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Emergent teaching movements in leadership development: Group relations, case-in-point, and intentional emergence

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Abstract

In a post-pandemic context, the need for leadership students to navigate ambiguous conditions and examine their automatic responses to authority has increased. Yet, common approaches to teaching leadership, such as group discussions and simulations, overlook the potential for using development spaces as living laboratories. This article explores three emergent-based pedagogies (group relations, case-in-point, and intentional emergence) that de-center the instructor, prioritize co-creation and emergence, and provide living laboratories for students to examine their assumptions and default behaviors related to leadership.

INTRODUCTION

Interactive approaches have long been accepted as important ways to teach leadership (Guthrie & Bertrand Jones, 2012; Guthrie & Jenkins, 2018). Activities such as group discussions, case studies, and simulations are often associated with experiential learning (Guthrie & Jenkins, 2018). However, there are several aspects of transformational leadership education that have been historically missing from the lists of engaged and active learning for developing leaders–specifically pedagogies that (a) make it hard for the facilitator or instructor to remain at the center of the learning process, (b) which prioritize the co-created emergent aspects of the environment, and (c) which reveal unconscious individual and group default responses to leadership practices. In a post-pandemic context, the need for a leadership student (whether they are in a coaching relationship, a classroom environment, a community-embedded experience, or other settings) to navigate ambiguous contexts, consider system-level implications for their actions, and examine their own

unconscious and default responses to authority and challenges has increased. Yet, traditionally, leadership development spaces still heavily reinforce a student's dependency on authority with an instructor in front of the classroom. At the same time, the early 2020s have taught us that we live in a world that requires us to embrace what emerges. The use of emergent teaching gives people the opportunity to learn how to navigate what is out of their control and to deal with what happens (Dalke et al., 2007). This learned skill also helps prepare individuals for an increasingly complex world where there may not always be similar or familiar answers.

This article examines three pedagogies that de-center the instructor/facilitator; emphasizes and creates space for co-creation and emergence; and provides living laboratories for students to interrogate their own assumptions and default behaviors related to leading. Historically, three leadership pedagogies that stand apart in these areas are group relations (GR), case-in-point (CIP), and intentional emergence (IE). The development of each of these pedagogies takes inspiration from one another and will be overviewed in the following sections to help better delineate between them and provide context to these pedagogies that are still in use today.

GROUP RELATIONS

Perhaps one of the earlier emergent pedagogies created for leadership development is *group relations*. Group relations were developed along the human relations movement of leadership development (Grint, 2011). The origins trace back to the contributions of Wilfred Bion and his seminal work with groups (Bion, 1952, 1961) in the 1940s at the Tavistock Clinic. Here, he observed dynamics that emerged in groups and noted the importance of group-level dynamics in addition to tending to the individuals in the group. He documented a style of working with groups that was inspired by Melanie Klein–direct, confrontational while void of social niceties. This helped the creation of what became the Tavistock Institute of Human Relations (TIHR) while the Tavistock Clinic began to shift its work in patient work as it joined the newfound National Health System in the UK null(Tavistock and Portman Foundation, n.d.)

It was from there that the TIHR and University of Leicester co-sponsored the first group relations conference (GRC), which was influenced by Kurt Lewin's experimental training groups and subsequent training laboratories (Hayden & Molenkamp, 2002; Miller, 1999). Lewin's training groups were developed out of the Massachusetts Institute of Technology's Research Center for Group Dynamics, which eventually led to the creation of the national training laboratory's (NTL) first human relations conference in 1947 in Bethel, Maine. These groups focused on the *here-and-now* and on the dynamics that emerged in groups (Yalom, 1995). The origins of these training groups, which were developed concurrently with the founding of the TIHR, aimed to show the benefits of democratic leadership (Lewin et al., 1939), perhaps a result of the impending world war occurring between fascism and democracy. Like these training groups, the focus of the first GRCs was no longer patient-focused or clinical but rather focused on the self-actualization of people and development of leaders. The first GRCs, directed by Eric Trist, employed similar groups named *small study groups* with at least nine and as many as 12 individuals (Miller, 1999) and with consultants interpreting any inter-group dynamics (Higgin & Bridger, 1964).

While the development of these experiential learning models was synchronous, the influence of psychoanalysis and shifting designs of the GRC and the focus toward interpersonal relationships of NTL events led to distinct experiences (Rioch, 1970). Rather than the dual task designed by Harold Bridger, Eric Miller shifted group work toward a singular task focus. Further, A. Kenneth Rice proved to be a key figure in the addition of large study

groups (Miller, 1999) with Rice who added a focus on the nature and exercise of authority in the 1970s. After Rice's passing, he became the namesake of the A. K. Rice Institute for the Study of Social Systems, one of the two prominent group relations associations in the United States, alongside the Group Relations International. The history of the GRC has been documented by those who played a prominent role in its development including works by Miller (1999), Rice (1965), and Rioch (1970).

Group relations in leadership development today

Today, group relations as a method of leadership development is still utilized in graduate education as well as in leadership development contexts. For example, the Columbia University Teachers College hosts a conference series within its social-organizational psychology program, and University of San Diego (n.d.) currently hosts the Leadership for Change Conference series, which is a course incorporated in their graduate degree programs in leadership studies and their coaching certificate programs. Other universities continue to host conferences as a co-curricular opportunity or for additional credit such as Boston College's Law School (n.d.) and within California State University, Dominguez Hills'(2022) psychology program. The Tavistock Institute of Human Relations (through the A. K. Rice Institute for the Study of Social Systems) still sponsors and hosts conferences, along with numerous other international organizations such as the US-based Group Relations International.

Outside of full conferences embedded within universities, group relations methods, sometimes also referred to as systems psychodynamics, are also incorporated into management development programs. For example, Joseph et al. (2021) described how these methods were used to encourage dialogue about racism and anti-racism as a tool for equity training in Canada. RISE San Diego (n.d.) is another nonprofit organization that embeds group relation groups within their leadership development program. In these programs, here-and-now sessions are embedded within a larger program design, where staff take on the role of *consultants* and participants engage in a session with the task of studying the dynamics of the group as it emerges. Application and debrief groups are then conducted to make sense of the learning that emerged and applied to larger curriculum goals.

Using group relations requires proper training before applying the methodology. Because of the influence of psychoanalysis, confrontative nature of consultation, and sensitive nature of conversations that emerge in groups (Cooper, 1977), it is important that proper training and preparation are undertaken to employ these tools. Consultant training programs exist with national organizations such as Group Relations International and AKRI. Yet, to qualify for this training often requires having attended a conference. Universities frequently allow participants to attend alongside graduate students to experience this method. Perhaps due to the experiential quality of these conferences, attending them first to understand how it can be applied could be beneficial. Alternatively, consulting with individuals who have prior group relations experience also serves as a way of identifying strategies of incorporating group relations either as a full conference or stand-alone sessions into programs.

CASE-IN-POINT

Case-in-point (CIP) is a teaching practice developed by Ron Heifetz and colleagues at Harvard University's Kennedy School (Heifetz, 1994) as a way to teach the adaptive leadership framework for leadership education, training, and consulting purposes. The CIP

premise is "what goes on in the classroom itself is an occasion for learning and practicing leadership within a social group" (Parks, 2005, p. 7). CIP teaching practice has roots in experiential learning pedagogies that leverage case studies and group relations to yield learning outcomes. The case study approach, commonly used in business and law schools, provides students accounts of lived experiences to simulate problems that learners may not have experienced themselves (Parks, 2005). Cases offer a powerful diagnostic lens for students. Yet, relying on past cases that are semblances of reality can overgeneralize and be difficult for students to connect to their own experiences (Yawson, 2014).

Like case-study teaching, CIP hinges on learning from a case. In CIP teaching, though, the case emerges in real-time. At the moment, an opportunity to learn about exercising leadership can emerge and be facilitated by a teacher. That moment for learning occurs in a *holding environment* that Heifetz refers to as "any relationship in which one party has the power to hold the attention of another party and facilitate adaptive work" (1994, p. 105). In a formal learning environment, that can occur when a teacher approaches the class as a social system that is available for teachable moments about leadership (Green & Fabris McBride, 2015).

To grow leadership capacity, CIP leverages disequilibrium (Hufnagel, 2015). Learners are invited into a space of ambiguity and uncertainty that can be disorienting. The disorientation mirrors the very conditions that make exercising leadership on adaptive challenges difficult. Often, a provocative action is employed to disturb a pattern, that is, prevalent in the room (Fern & Johnstone, 2023). During these experiences of disequilibrium, a key move in CIP teaching includes pausing the action and *getting on the balcony* to make sense of the action in the room (Heifetz & Linsky, 2002). Debriefing on what is happening in the room is a fundamental aspect of CIP learning. Debriefing opens up space to apply the learnings in the room to one's adaptive challenge. Another way to understand *getting on the balcony* is as a practice of critical reflection. Kniffin, Priest, and Clayton (2017) note that *critical reflection* is a moment when an espoused theory (ideal value) is contrasted by a theory in use (lived value). Critical reflection offers opportunities for participants to explore the gap between those values.

In addition to debriefing and reflection, CIP teaching involves diagnosing what is happening in the room at four different levels of attention (Green & Fabris McBride 2015).

1. Individual (What is the person doing, and why?;
2. Interpersonal (What is the pattern of behavior between individuals, and why is it occurring?;
3. System (What dynamics and patterns are at play in this room?; and
4. Context (What outside forces are affecting this group?

These levels of attention serve as ways to orient learners to a different, fuller diagnosis of the adaptive challenge. CIP teaching has been used in a variety of leadership development contexts. Heifetz, Linksy, and the Cambridge Leadership Associates (Heifetz & Linksy, 2002) have employed CIP with clients in a variety of private and public sectors across the world. It has also been adopted into the curriculum of university leadership programs, including University of San Diego (n.d.) and Kansas State University (n.d.) amongst others. The Kansas Leadership Center (KLC) offers a case-in-point training that has produced hundreds of alumni that use CIP in community leadership programs, in-house organizational development trainings, leadership coaching sessions, governmental agencies, and formal educational institutions.

Exercising leadership on adaptive challenges is risky. Inviting people to learn about leadership through a real-time experiential learning method is also risky. Program demand,

end-of-program evaluations, and stories of people progress on adaptive challenges suggest that CIP teaching is worth the investment and risk. However, little empirical research exists on the teaching practice itself (Weng & Hubbard, 2022). In addition to calling for more research on the topic, significant training is needed to practice CIP. The resources in this text provide content that can be used to scaffold the CIP learning experience in ways that meet people where they are in learning about leadership. Moreover, the above-mentioned training opportunities and an active *Adaptive Leadership Network* are available to develop the capacity of leadership educators.

INTENTIONAL EMERGENCE

In 2006, the Leadership Minor faculty and staff at the University of Minnesota began working with Dr. Sharon Parks on how the ideas in her book, *Leadership* can *be Taught: A Bold Approach for a Complex World* (2005) could be adapted to support the needs of undergraduate students. The ideas in Park's book were based on Ron Heifetz's CIP teaching at Harvard and had been carried out with graduate students–many of whom were mid-career, authority figures in their own work contexts. The core ideas of CIP, such as using the classroom as a living leadership laboratory where students can take small risks and run leadership experiments in real-time, addressed gaps that faculty and staff at the University of Minnesota Leadership Minor were concerned about. However, the faculty felt the level of heat/tension that Heifetz starts within his classes was too high and too immediate for undergraduate learners who were not as far along in their leadership identity development process.

David Hellstrom, a professor within the University of Minnesota program, in collaboration with the Leadership Minor Director, Linnette Werner, ran the first version of this experimentation in 2007 (Werner & Hellstrom, 2021; Werner et al., 2016). Their goal was to use as much case-in-point philosophy as possible but to add elements to better support undergraduate students in slowly learning to tolerate the tension and ambiguity that are naturally part of emergent-based pedagogies. Student evaluations showed positive results and more students were retained in the program than had been before the pedagogy experimentation. Over the next several years, Werner and Hellstrom codified the approach, trained other faculty, and expanded it to other sections of the program. The results were similar to the initial experimentation–higher course evaluations and better retention from the first course into the second course. In 2015, a group of Leadership Minor faculty members published the initial results of their work on the model (Werner et al., 2016), seen in Figure 1, and found students who participated in the program were six times more likely to persist toward graduation.

Intentional Emergence Model

The model is based first on the understanding that instructors are formally responsible for the rigor of a space (whether it is academic or not) and this responsibility includes content development, learning outcomes, readings, and assessing learning and outcomes. These traditional responsibilities make up the *intentiona*l part of the model as Figure 1 demonstrates. The *emergence* side of the model represents those things that influence what happens in the leadership development space, but are often unseen, unintended, unconscious, or otherwise not intentionally developed. Examples of what might emerge in a classroom are patterns of attendance, microaggressions, world events, spontaneous behaviors, etc.

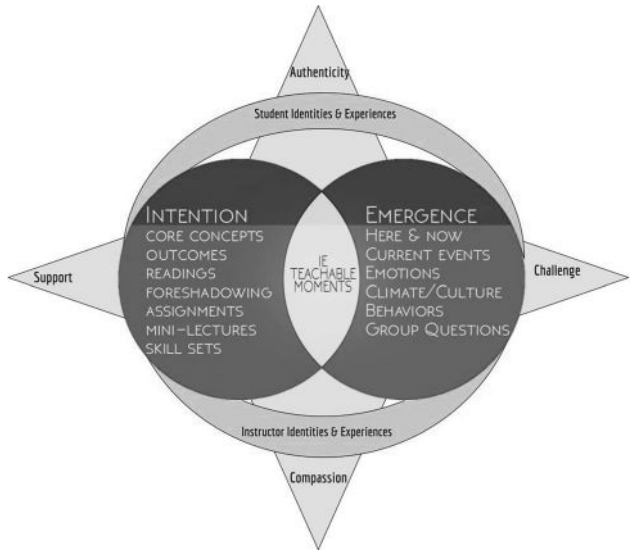

FIGURE 1 Intentional Emergence Model Copyright 2022 by Linnette Werner, reprinted with permission.

When an instructor's intention for a leadership lesson joins the reality of what actually happens in that space, there are often moments that arise that become effective teaching moments to bridge the gap between leadership theory and practice. Unfortunately, many instructors are not taught to embrace what naturally arises in a classroom, but instead try to minimize or exert their authority to control what emerges instead of using it as the laboratory opportunity it could be to have students experiment with their own leadership styles.

Additionally, the intentional emergence model (Werner & Hellstrom, 2021) asks instructors to consider how their own identities, and the identities of their students, affect arising patterns and the leadership responses that follow from the group. Since the body is the instrument of leadership, identities, and identity politics matter. Being aware of how the identities and lived experiences of the people in the room affect leadership is an important part of the way the IE pedagogy is carried out.

Finally, the IE model is grounded in values: compassion, authenticity, and the individualized balance of challenge and support for each student. Recognizing how the model was created to support the tolerance of increased tension, stress, ambiguity, and other *heat* factors accompanying acts of leadership, these values are foundational in creating a container robust enough to hold the emotional and psychological needs of developing adults as they bring forward unconscious ideas and critically examine their role in effective leadership. The guiding values represent the gentle scaffolding of experiences needed to bring emerging adults along on a transformational experience instead of starting with high levels of disorientation and heat that might trigger them to shut down or go into fight or flight mode.

How intentional emergence is used in leadership development today

Intentional Emergence is used in several leadership development programs and spaces across the United States today. It is often selected as a leadership development approach for three key reasons: (1) It keeps students engaged and showing up to class (which helps with retention and recruitment; (2) There is a smaller gap between theory and practice because the development space becomes a living leadership laboratory; (3) IE offers a

more gentle on-ramp both for students and instructors than other emergent approaches have in the past; and (4) It offers a concrete way for instructors to begin to deal with (and eventually embrace) the natural disruptions in their classrooms which are becoming increasingly common (e.g., attendance issues, trauma, microaggressions, distractions such as phones/social media, etc).

In their book, *Teaching from the Emerging Now*, Werner and Hellstrom (2021) outlined many tools instructors and facilitators can use to embed an IE approach into their leadership development practices. The three most commonly used approaches are:

1. **Plan like hell and let it go**: The idea that planning plays a huge role, but once class begins, the plan has to become secondary to being present to what is emerging and what can be engaged to deepen the learning.
2. **Stop the action**: The ability for anyone in the space to stop what is happening at the moment and ask questions or call out patterns of unconscious behavior that the group is exhibiting. Giving permission for this to happen and then modeling the behavior is key for reassuring students that it is worth the leadership risks to try it.
3. **Planned spaces for co-creation along with naturally emergent moments**: As part of planning class, instructors look for spaces in the agenda where they can give the work back to the students or allow them to help co-create the space or content. In addition, IE instructors look for spaces where something is naturally emerging (e.g., a deep question about content from the last class that merits allowing a lot of space for the group to explore).

SUMMARY

Emergent pedagogies offer educators and practitioners opportunities to facilitate leadership learning beyond the traditional, and often better document strategies, employed (Guthrie & Jenkins, 2018). In some ways, this style of learning can often counter the very expectations of the academy and program design. Instead of forcing outcomes and determining activities a priori, the beauty of emergent pedagogy is in its fluid and dynamic nature. It calls on those in front of the classroom to be prepared to link to what happens in the now across all the contexts of it—the now of the mind, the now of the classroom, and the now of the world. Adrienne Maree Brown (2017) reminded us in *Emergent Strategy* that change is constant at all levels of the world, our bodies and our minds. In this world that is constantly changing, one of the ways leadership educators can be best equipped to meet the learning needs of our classroom is to allow the learning to emerge from the moment at hand.

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