
Leadership Academy: Generative Thinking

Transcript

>> Andrea Falzarano: Welcome to the ASHA Leadership Academy webinar, Generative Thinking. This webinar content is appropriate for emerging and experienced leaders. I am Andrea Falzarano, Director of Association Governance Operations at the ASHA National Office. We planned today's webinar because the ability to use generative thinking is essential to being a leader in any work setting or organization. Each of you should have a copy of the handout, which includes speaker information and slides. If you do not have the handout, please pause the webinar now and access a copy from our website. You will need a copy for interactive sections of this presentation. At this time, I would like to welcome our presenters, Kevin Nourse and Alice Waagen.

Dr. Kevin Nourse is an executive coach, organization development consultant and facilitator with nearly 20 years of progressive experience in both for-profit and non-profit organizations. He is a professional certified coach through the International Coach Federation and has extensive experience coaching leaders in the areas of emotional intelligence, career planning and transition, influence, risk-taking, and strategic thinking. Dr. Alice Waagen is a business consultant who teaches management skills to business leaders. Alice has conducted hundreds of workshops and training classes at many of the country's top fortune 500 companies, non-profit organizations, and government agencies in the Washington, DC area. In just the last five years, more than 132 leaders from 26 regional organizations have graduated from her unique leadership development workshop series. Now let's begin. Over to you, Kevin.

>> Kevin Nourse: Thank you, Andrea. Welcome, everyone, to the Leadership Academy webinar on Generative Thinking. We're really happy to have you participate in the webinar, where we're going to be exploring the concept of generative thinking and provide you some tools and techniques to move forward and take action quickly with the topic. I would like to review our disclosure statements. I am Kevin Nourse, principal of Nourse Leadership Strategies, and I'm an independent contractor. I am being financially compensated by ASHA for the Leadership Academy webinars, and I do not have any non-financial interests with ASHA. My colleague, Alice Waagen, is a subcontractor to Nourse Leadership Strategies. She is also an independent contractor, financially compensated by ASHA for the Leadership Academy webinars, and without any non-financial interests with ASHA. We're going to get into the agenda in just a moment, but I did want to, um, point out that there's two audiences for our webinar today. We've got participants in the classroom we'll be engaging with, and then, of course, we've got those of you listening on the recording. For those on the recording, throughout the webinar, we'll be posing certain reflective questions to apply the content to your own worlds, and at that point, we'll introduce the question and then suggest that you hit the

pause button on the replay to allow you to capture some notes or reflections on your handout or in your journal. When you do that, take a moment, when you're ready to rejoin us, just hit the replay button and join us in action. So, with that, I'll toss to my colleague, Alice, who will take us through the roadmap for today.

>> Alice Waagen: Wonderful. Thank you, Kevin, and I want to thank everyone who is participating on this webinar today. Generative thinking is a very interesting concept, a unique concept, and one of great value to anyone who aspires to leadership, so we love to have it as part of our Leadership Academy. So, what are we going to do today? We're really going to talk about the fundamentals of generative thinking, really going to take sort of a high-level fly-by. We're going to start by talking about three concepts. Our three content areas are what are the three modes of governance, and then what are criteria to judge whether a topic is a good one for generative thinking, and lastly, how does one run a generative thinking session, what is the process and the setup to do generative thinking. Now, some of you on the webinar today might be in a leadership position right now in your work or profession, or you might be serving on a Board of Directors even. Others may be individual contributors. This topic can really be applied to anybody who really wants to explore future trends, issues, and opportunities that might be coming down the world that would impact you. So, it's a way of thinking and acting and processing that's really anticipatory. So, Kevin, I think you're going to give us some definitions next.

>> Kevin Nourse: That's right. So, let's start off, um, defining what we mean with certain key terms so that we all have a common frame of reference. Um, so, first of all, generative thinking, um, it's a fairly complex construct, or concept, but let me break it down into some of its parts. Really, it boils down to, um, a process for engaging groups to tap their collective wisdom, and ideally, that group would include multiple stakeholders who have an interest, say, in the organization, and, really, the bottom line, it occurs in the concept, or the construct of dialogue and questions. So, participants determine where to focus, what their observations mean, and, really, the implications for an organization. So, I think this definition succinctly defines it, deciding what do we pay attention to, what does it mean for us as, say as a board or a leadership team, and certainly, an organization, and what do we think we're going to do about it. So, a couple, um, nuances associated with it. Really, the idea of, um, in a perfect world, we would use generative thinking long before concrete plans or strategies or even decisions are made, but it really is kind of that, um, dealing with emerging trends and issues that are of really critical importance for the organization and how to get our best thinking, our thought leadership around what does it mean for us and what might we do with it. Also, in a perfect world, and ideally, this is something that happens on an ongoing basis, because the reality is, um, the world that we live in and with which organizations function is rapidly changing, so we look at this perspective of generative thinking and making sense of these things is really critical in terms of the viability of an organization.

Secondly, the second term there, governance, really, you know, that reflects the larger context of how, um, senior leaders and Boards of Directors guide the organization, and

they do that through policies and guidelines, assigning accountabilities, and just the overall leadership of an organization, and so as we'll explore more fully in a moment, generative thinking is one of those techniques or strategies that, um, organizational leaders can use as, you know, an example of governance, so governance is one mode of, um, you know, managing the organization. The third point there is sense-making, and you might think about it, sense-making is that process that a group goes through to interpret events and make meaning of them, or certain events or trends, and in some ways, generative thinking is a fairly structured approach to making sense, but doing it in a group context. Um, Alice, anything you'd like to underscore in our definitions before we move on?

>> Alice Waagen: Yes. You know, I was pondering this whole issue of generative thinking, Kevin, the other day, and sort of an analogy came to mind. Um, I'm originally from the northeast, and, um, my family that's up there, you know, there's some pretty bad weather in the wintertime, and most people have taken to putting in place, um, home generators, so that when the power goes out, um, they can quickly recover and, um, heat their house and move on, and I was thinking, in a way, generative thinking makes me think of that, a generator. It's, you know, we're governing, um, using our normal tactics and processes and techniques, and yet something comes over the horizon that's totally unexpected, and that regular mode of governance isn't really going to work as effectively, or it may not work at all. Generative thinking allows us to really power up, I think, in a different frame of mind, to look at things differently and use that new things coming at us as a way to really enhance our thinking and our processes and programs. So, that was sort of my analogy of the day.

>> Kevin Nourse: Yeah, it's a really apt one. I think that's really relevant, because, ultimately, that's a challenge, I think for leaders and organizational boards. Um, the key is, you know, who's thinking about the future? Who's anticipating what may be coming down the pike? And that's really critical, and I think, again, how much the world has changed and what organizations face, um, to me, that's really imperative in this world, for, um, organizations to use this approach. Well, why is it so important for CSD professionals? Well, there's, you know, ideas there, but, again, underscoring what I just shared, ultimately, to be leaders, um, effective leaders, you know, for organizations, the key is anticipating what's coming down the pike, and so it's really important, from that perspective, someone needs to be thinking about that, but this, to me, is a really important skill for those on the leadership trajectory, so it really demonstrates your capacity to think both strategically and longer-term and bigger picture, which I think would be really important in terms of one's functioning as a leader, and also one's reputation. Okay, so, what I'd like to do is touch upon what are some of the emerging themes in the research associated with generative thinking. Um, so, there's a number of, um, threads. Sense-making and framing are two perspectives, um, and we're going to get into what framing means in a moment, but in essence, it really represents how we view an issue or a challenge, what frame or perspective might we want to use, so we see more research being done on that, but, um, one thing that stood out for me was, um, this study, evaluative research on generative thinking among boards, and it's interesting,

this researcher graduated from the same place I got my Ph.D, and this just came out in 2017, so, you know, my, I tip my hat to this new scholar who just finished her Ph.D and did a wonderful study looking at the impacts of, um, generative thinking among boards. So, really powerful, um, piece of research in terms of looking at the bottom line impact, and as a result, some strategies for improving how to use generative thinking to really incent boards and help them function better as it relates to anticipating the future. So, those are a few of our key themes associated with, um, the emerging research. So, I think at this point, Alice, um, you were going to take the first reflection question.

>> Alice Waagen: Yeah. Let's use this opportunity to kind of get our minds around these whole issues and do a reflection. So, again, those of you who are, um, accessing this webinar from the recording, um, let me set the stage for the question, and then definitely pause the recording so that you can make some notes and reflect on this yourself, and then you can join us when you're done, and those who are with us today in the classroom can contribute in the chat box. That would be wonderful. So, our question, what are some of the issues or challenges facing your organization that might drive a greater emphasis on generative thinking? So, what's out there that is keeping people up at night is the way I like to phrase it. What's out there that is a serious issue, that this concept of generative thinking might be a useful tool? So, again, recording webinar participants, just go ahead and pause and rejoin us when you're done, and those who are with us today in the classroom, if you could start to put some of your ideas in the chat box. Kevin, what's an idea that comes to mind for you that you think is in the world of business, healthcare, education, today that could be an interesting topic for generative thinking?

>> Kevin Nourse: Yeah, you know, it's interesting, I work a lot in the healthcare space, and, um, at the strategic level, and, of course, so many of the leaders I'm working with in that space are struggling with who knows what's going to happen with the Affordable Care Act, reimbursement models in the healthcare space, so that is creating a lot of anxiety among healthcare CEOs, as well as their Boards of Directors, um, and so much of a leader's role is, of course, to manage the anxiety of your bosses in terms of the Board, but the other perspective, things like, um, telemedicine is becoming a significant new trend in the healthcare space, where, you know, doctors or clinicians are able to intervene with their patients, um, kind of even the idea of nanotechnologies, so we can inject, um, materials into our bodies and use that to monitor and, in essence, report in how, for example, we might use our iPhones to capture data from a diagnostic tool inserted in us to send data back to a hospital. Um, you know, that kind of thing, as well as improving patient experiences, because in the healthcare space, competitions become pretty brutal among healthcare organizations, and so, again, it's a huge thing. All of those are really complex issues that no one's really figured out yet, and it's creating a lot of anxiety, and it's really creating a strong mandate for organizational leaders to get onboard with that. So, those are some thoughts I have. Anything that you, um, notice among your clients?

>> Alice Waagen: Well, um, on the other side of the scale, the world of education is equally facing a lot of challenges. Higher education is seeing costs escalate, and yet, um, as tuition is raised, the number of available students drops. Of course, the crisis with the student loans and debt and all that means in terms of universities being able to get a good, strong student body, and in elementary and secondary, the tug-of-war between, um, you know, charter schools and public schools and that whole arena, I think has got people seriously worried. Um, our participants today, Margot says plans to move several audiology clinics into a new facility where these clinics will be together in a common space. Oh, wow, that could be a very ripe area for some generative thinking. Um, working to build camaraderie and teamwork. Very, very interesting. Sarah says changes in healthcare causing staff dissatisfaction and decreasing staff retention. Yeah, so many of the healthcare professions are seeing, again, a drop of people wanting to go into them for careers, because they're seeing it's not as rewarding as they might have thought it was. Marilyn, also, staff changes. Nad says shift of hospital framework from public government sector to more privatization. Interesting. This transformation requires participation on all levels. Yeah, um, Nad, you know, you cause me to think also of what I see in the healthcare arena. So many of the smaller hospitals merging or being acquired by larger ones, total shift of mindset and delivery of service from the way they're used to. Excellent. Well, I think we've got our brains in the right mode to begin to tackle this as a useful tool for leadership. Kevin, you want to start us off?

>> Kevin Nourse: Yeah, that sounds good. So, our first, um, building upon what we've talked about, we start to think about this idea of modes of governance. So, I talked about governance as really a key, um, process, um, that organizational leaders take responsibility for, you know, guiding the organization. Really, within that, you can think in terms of three modes of governance. So, we start, um, again, long a continuum. So, the continuum is from more operational, day-to-day, current realities, very, very defined issues. The other extreme is big picture, very amorphous, issues associated with organizational identity or our core values, what we stand for, future possibilities, um, both challenges and opportunities, and very ambiguous, so it's very, very, um, you know, not defined, very nascent. So, we can think about different forms of governance sliding along this continuum, and we've got three specifically. I'd like to define those. We start, first, at the fiduciary mode, and, you know, think about the root of the Greek word, fiduciary, it's trust. We have a trusting fiduciary responsibility with our accountant, or our tax advisor, so someone who's going to look out for our interests. So, fiduciary typically is focused on making sure that the organization's resources are used appropriately and in accordance with the mission. Um, so, for example, making sure that, um, your organization, um, is in compliance, say, with federal or state laws in terms of tax reporting, or managing your revenue and expenses according to the budget, which is really the organization's wishes around what really is important in priorities, we think about that. Um, or even, you know, making sure that, um, organizational leaders act ethically, and ethical leadership, which is really a huge part of the fiduciary mode. So, all of those are examples of very defined issues happening today, um, to some extent, operationally-oriented. We then move up a notch, more toward that, um, more

amorphous state of a strategic mode, and you might think about that strategic mode of governance as, really, the essence of it is gap analysis, which is where are we at now as an organization, what is our intention for the short-term in terms of our goals or priorities, and then how do we fill that gap, and you might think about, um, the classic organizational, um, method of strategic planning. You know, we go through a strategic planning process every few years, typically, in organizations, to really help focus the organization and define more succinctly exactly how are we going to get from A to Z.

Um, for example, you might think about, um, I know ASHA's got a very, very well, um, well-defined strategic plan that's also very well-communicated, but, for example, ASHA's identified eight strategic objectives, such as, um, enhancing service delivery across the continuum of care, or increasing, um, members' cultural competence as the world of, um, audiologists and speech-language pathologists evolves. So, those would be examples of functioning in the strategic mode. Um, generally, what you'll find is, you know, a lot of organizations function at the fiduciary mode, and many of them do function at a strategic mode, which is important, because, again, in this wildly, um, tumultuous environment that most organizations work, um, you know, having a clear sense of where we're going is so essential. So, then we think about the generative mode, which is, you might think about it almost like the peak of the pyramid in terms of functioning. My experience has been that a lot of organizations don't get there, and, um, just tip my hat off to ASHA for really using a generative mode in terms of its engagement and interactions between the Board and association leaders, that not a lot of organizations use that, and in fact, they really do need to. So, we can think about, again, generative mode, building upon my definition of we're exploring critical ideas, issues, factors that may ultimately impact the organization. For example, um, ASHA, like a lot of associations, um, really needs to focus, and very much is, by virtue of this Leadership Academy, how to grow and groom future leaders for the association. Um, or, you know, considering the role of artificial intelligence on the professions of audiology or speech-language pathology, but let me give you an example of something that is so vivid and so recent that I think it just makes a really good example of the generative mode.

Um, National Public Radio, just relatively recently, did a story about the NAACP, which is a very historic organization in terms of, um, equal rights for people of color in the United States, and it surfaced this concern or this issue that really screens for a generative conversation. The association, NAACP, is really struggling with how to remain relevant for its members. Um, if you think about, um, so, what appears to be happening is that you got younger members that are associated with more activists-oriented social justice groups, such as Black Lives Matter, and they're really unclear about the role of the NAACP. Um, in addition, historically, the NAACP, which has a lot of members who, for example, knew Dr. Martin Luther King, Jr. personally, you know, so they grew up in that era in terms of the social, um, justice movement, um, but you've got, um, so, in this environment, um, typically, NAACP traditionally chose, um, a reverend or a pastor to lead the organization, um, built on a premise of preaching to the membership. However, there's different perspectives now, and some schools of thought among their stakeholders is that the current environment calls for the greater need for the leader of

NAACP to be an organizer, and so the idea of who needs to lead the organization in light of the current realities faced by people of color is really a critical one, and it's the kind of thing that really needs a generative exploration, um, to get clarity about what is the future looking like for that. Okay, so, that, just to summarize then, we've got our three, along the continuum, three different modes of governance. All are critical, and it's particularly important to, um, make sure that all are present in terms of how the organization is governed. Relatively, few organizations, my experience has been, get to that generative mode. They will certainly do a strategic plan, but when it comes to those nascent, emerging issues that do need some thought leadership among their key stakeholders, again, I think it's typically your more evolved organizations, like ASHA, that do get to that point. Alice, anything before I move to the second graphic that you want to highlight or point out?

>> Alice Waagen: No, I think that was a great example, um, what is facing the NAACP, I think is facing, from my experience, almost every association today, and that is the values, the products and services that were of value to their members years ago are becoming less and less of value to the younger members coming in now and how to evolve with that, how to rethink what is the association's role in the lives of their members, I think is really a critical generative topic for today. Yeah.

>> Kevin Nourse: And even, you know, those of you, some of you listening to this webinar may not be on a board or at a senior level, um, but, again, I think it's relevant. For example, I just recall, um, I spent a number of years as a human resource director with a big consulting firm and created a new function called employee relations, and, you know, it was the kind of thing that, um, I could have used a generative conversation with some of the key stakeholders, because nobody really knew who we were and what value we created, and, um, so we needed to get some clarity about that, and so that concept of issues of identity and what we stand for and our values, um, again, that construct can be used at different levels of the organization, not just at the most strategic level, although that's where we're focused in terms of, um, the conversation now. So, again, I think it's that concept of finding a way to have conversations that matter about issues that are very, very deep around identity. So, let's talk about, um, the idea of how we allocate our time. It's so fascinating, I find, as an executive coach, I work with a lot of senior leaders, and every one of them tells me, I really want to think more strategically, I want to think bigger picture about emerging trends, in essence, I want to think more generatively, and I go to their calendar with them, and I say, well, point out on the calendar where you're going to do that, because it's all well and good to talk about it, but, you know, where's the action. So, you might think about it in terms of time allocation. So, at different levels of the organization, and this is just representative, not a precise, you know, prescription for time allocation, but at a staff level, you know, the bulk of, you know, individual contributors would be focused on more fiduciary-level types of governance issues. Little bit on strategic and a little bit on generative.

Now we move into a manager role, a formal manager role, and you can see that the equations start to shift a bit, or an organizational leader, where there's now much more

of a spread, and then, um, organizational board, who should ideally be focused largely on generative topics and generative focus. Um, so, I think this is just a good rule of thumb and an important question for all of us to ask ourselves; in light of our role, to what extent are we, um, demonstrating our commitment to thinking generatively and, um, how we invest our time, because someone really does need to be thinking about these bigger picture issues that are very poorly defined, because they eventually may impact the viability of the organization. Um, anything you want to underscore on that, Alice, before we move on?

>> Alice Waagen: Well, it's always about trade-offs, right? If I am a leader and I get pulled into the fiduciary mode extensively, I am trading that off for being able to be strategic or generative, so it's making the conscious choices to be in the right place, with the right mode, I think that's the definition of leadership, really.

>> Kevin Nourse: Yeah. So, I've had leaders do time audits. That would be a very interesting thing, to code your calendar over the next two weeks, how you're allocating your time among these three modes of governance, to, say, have a senior leader do that could be very eye-opening. The data speaks for itself in that regard. So, let's continue. I wanted to, um, make this even more real for you, and let's talk about modes of governance, and this is a pretty specific example from ASHA. Um, so, what's key here is that, um, so, an issue emerged, um, within, um, ASHA, and how the three different modes of governance are manifest, so I just want to point out in a concrete way that everybody would understand, um, that kind of perspective, but I also caveat it. Generative conversations don't necessarily, um, always equate to a strategic conversation and/or a fiduciary one, so I think it's important to have generative conversations, but, again, there's not always a clear linkage or sequential step into strategic and fiduciary, but in this case, there were components that ASHA went through with both. So, really, it started off with, um, a board discussion about the continuum of care and cost effective service delivery. So, the discussion, in terms of the generative discussion, led to, in essence, more clarity and commitment among board members, that, in fact, ASHA should advocate for members to practice, say in a more intentional way across the continuum of care, and that would be in the form of determining what services they can provide and then appropriately delegate to lesser-trained staff. So, very big issue that's been out there awhile, but it was a very powerful conversation among the board.

So, in this case, it did lead to a strategic, um, perspective, so this generative discussion led to the decision to incorporate this concept as part of the strategic plan, and it incorporated into the strategic pathway as a specific objective, in this case, um, an objective was enhance service delivery across the continuum of care to increase value and access to services. Um, finally then, we look at, like, how would that be represented from more of a fiduciary perspective? Well, ultimately, a little preliminary plan in terms of costs and resources around credentialing for assistance, um, to bring it to a little bit more specificity. So, again, the bottom line is that, um, while critical for overall effective governance, and it's a critical role for senior leaders, generative thinking may not always

lead to specific strategic priorities and tactical actions represented in fiduciary, but it's absolutely critical that senior leaders, as well as board members, have that kind of conversation, because we don't always know where it's going to end up. Um, before I move on, what would, anything you want to add or underscore, Al?

>> Alice Waagen: No. I think it's a great point, and it's a great graphic here. It's not a one, two, three step, it's not a process, it is a mode, and, so, you're right, generative, um, mode could generate fabulous ideas that are not ready yet to get into the strategy or the fiduciary world. Um, there's still good conversations to have.

>> Kevin Nourse: That's right.

>> Alice Waagen: So, I think --

>> Kevin Nourse: I think I'm going to take it. We'll go into a reflective question at this point.

>> Alice Waagen: Sure.

>> Kevin Nourse: Okay, so, the reflective question, again, would be to think about these three modes of governance, um, and where you play, perhaps, a leadership role. Um, how can you and your colleagues allocate your time to all three modes of governance? Think about how you allocate your time, and what would that look like, to be able to allocate, you know, effectively, depending on where you're at in the organization, your time against these three modes of governance. At this point, for those that are on the recording, if you want to hit the pause button, take a minute and reflect on, again, how can you allocate your time to all three modes of governance, and what does that look like, are there any barriers associated with that. Let's hit the pause button for you all, and then, um, we'll resume in just a moment. Alice, anything that, um, occurs to you, again, thinking about leaders that you've worked with and their time allocation?

>> Alice Waagen: Well, I think one practice that is ironclad, as you mentioned earlier, is actually put it on calendars. So, the generative discussion, you know, take a regular senior leader meeting and say the third meeting of every month, we're, you know, extending it an hour, and we're going to bring to the table what's out there, we should be having our eyes and ears on. If not, the pull, the drag back into the tactical, the fiduciary, is just too strong.

>> Kevin Nourse: Mm-hmm. You know, it also reminds me, I'm working with a senior executive who's, um, on the way up, he's been tagged to ultimately take over his boss' role and maybe move towards CEO, and when I collected feedback for him, by and large, the largest suggestion for his development was the need to do what they, in their culture, call transformative thinking, that really very much is generative thinking, and so with this client, what he's been doing is he's going to, um, trade shows and conferences, even, he's a real estate developer, beyond his specific industry, to better understand that, um, what's happening in other related fields that may impact his organization. He's

also, for example, brought in, he found a scholar, researcher, who's done some research about business development, things like that, property development, and he's bringing them in to do some knowledge-sharing among the senior leaders so that he can really champion that. So, he's very much making time for this and engaging and really thinking about how to engage key stakeholders, in essence, in having these conversations that matter. So, I think it was a really good example. Um, so let's just look and see what the group has identified. Marilyn, absolutely, putting meetings on the calendar, again, with the ground rule of trying to navigate going into the weeds or trying to prevent that. Allocating time, as we talk about. Sarah's planning a half-day leadership retreat so we can be more strategic on how to deal with the changes in healthcare. Absolutely. So, getting that on the agenda, and kind of almost like forcing people to have that, lock the doors, we're going to really focus on these kinds of strategic or generative conversations that matter. Okay, so, um, I think we're ready to move on, Alice.

>> Alice Waagen: Yes. Let me, um, start us off on our next area of thought, which is what criteria can we use to determine if an issue or a challenge would be good for a generative discussion. So, in our, um, example here, we've got five criteria. I want to walk through them one at a time. They're pretty, um, self-explanatory, but I think that they're good to focus on. The first one, ambiguity, um, you know, ambiguity is we don't know what the right answer is, we don't know what the direction should be, and there are many different views or many different ways of looking at an issue, so that, you know, in the case of the NAACP challenge, there were multiple views, because there were multiple key stakeholders who had deeply-held views of what they should look like going forward. Our second criteria, saliency, is how important is it to the key stakeholders or to the public. You know, is it relevant enough and important enough to merit the time and attention that generative thinking would give. The third issue, stakes, the issue is critical and holds implications for, really, the core elements, or the heart of the organization. The stakes are high. Um, not thinking this through could have serious, far-reaching implications, and, again, to go back to Kevin's example earlier, NAACP, or as I had mentioned, other associations are facing this, the stakes are extremely high. If, indeed, they don't rethink relevancy to a younger generation, they simply will cease to be. Um, strife, we could rename this the pain degree, you know, how much conflict/confusion is there around this issue. And lastly, irreversibility, and I like this one in particular, because it means that whatever we decide, we can't back out of.

Now, I think you can see that if an issue is hitting the bells on all five of these, it would be incredibly important to be used as a generative discussion, or to be in the generative mode of working on. I would find that, also, by the way, in the business world, there's other thoughts around this. Back in the 1990s, the U.S. Army War College coined the term VUKA. What had happened, with the end of the Cold War, is the whole world of defense shifted tremendously. For decades, the focus was on the containment of communism, and that just literally went away almost in a blink. So, what does VUKA mean? The issues are volatile, uncertain, complex, and ambiguous. Very similar to the five you see here. If these criteria are in place, it definitely is something to spend the

time, to invest the resources and the energy, to put on the table in a thoughtful discussion. So, Kevin, I think you've got us moving into a reflection here.

>> Kevin Nourse: That's right, and I would just add that these five criteria, um, are based on the work of the book *Governance Is Leadership, Reframing the Work of Non-profit Boards*, so that's in your book of additional reading, so if you'd like more information on these, um, criteria. So, yeah, at this point, let's do a reflective look. So, the reflection question is think about one of the issues that you identified earlier in the webinar that might be a good focus for generative conversation. Um, to what extent does that example embody any of the five criteria? And let's just see what we come up with. Again, the premise is not that it has to meet every one of the criteria, but, in essence, it's really thinking about is this substantial enough that it would be worthy of a generative conversation, and let's see what you come up with. For those listening to the recording, if you want to hit the pause button and reflect in your journal or in your handout and then replay when you're ready to begin. So, um, I don't know, do any of these stand out, Alice, for you when it comes to some of the issues you see, um, in your clients, especially among senior leaders?

>> Alice Waagen: Well, yes. You know, um, for instance, I think one of the burning issues out there, both in the non-profit and the for-profit world, is we are blessed right now to be in a time of very low unemployment, um, and that said, that makes filling critical positions even more difficult, and I know organizations have been doing a lot of generative thought and transformative thought about the whole recruitment and retention process, because they, with vacancies, without the right talent, they can't achieve mission, and if they can't achieve mission, we kind of get into a downward spiral. So, I think, um, that that, in my mind, hits, definitely, all five of these.

>> Kevin Nourse: Mm-hmm. Yeah, I was thinking about, um, again, some of the issues I'm seeing in healthcare around, um, telemedicine that they're starting to deal with, and the stakes are very high, you know, in terms of life and death instances, in terms of public health and people's physical well-being, and, so, um, you know, the use of technology, again, as we all know, is a blessing and a curse. When it works well, it can be life-saving. The flip is also true. So, let's just see what, um, some of our participants have shared. Um, let's see, we've got Nad who talks a little bit about, um, let's see, um, transformation toward privatization example. Very much so, Nad. I'm working with a medical center here in southern California that's actually going through that. They left the county, and a for-profit took them over. It is substantial in terms of their thinking, suddenly going into maybe a profit orientation, accountability to their stakeholders, that whole, it's a huge shift in mindset, and I think a classic example that touches on, really, all five of these, so I think it's really a great observation. Yeah. Okay, um, very good. So, I think at this point, we'll continue, and we'll talk about application of generative thinking and take it to the next level. So, when we think about applying generative thinking, really, four key steps in the process. Really, it starts with, um, to what extent you need to educate, you know, some of your stakeholders within your team or organization about what generative thinking is, how it fits into the three modes of

governance, and really, what does it comprise, what, really, is the essence of it. Secondly, we then start to think about, well, what are some of the generative topics, and ideally, we would do this more than just once, but I think starting off, what are the list of topics and issues that really should be considered. Again, it's taking what we intuitively know, applying some of the evaluation criteria to figure out is this really a critical issue that we need to clarify and get some thought leadership going and engage some key stakeholders. We then start to better define these issues, by framing them, exploring them, getting more clarity about them, and then, finally, reflecting on the process, because, you know, to think transformatively, I think there needs to be a reflective process about how are we doing with this, what are we learning, and is this process working for us. So, with that, I think, Alice, you're going to take it to the next level and talk about, um, the next stage of applying.

>> Alice Waagen: Yes, and this is kind of where the rubber meets the road in this webinar. I mean, we've been talking about it, how do you do it? How do you do it? So, first of all, we have to follow our steps for identifying the issues. You're going to have a meeting, you're going to bring people together to have a generative discussion, the first question should be who should be in the meeting, who are the appropriate people. You definitely want representatives of the key stakeholder areas, you want people who are thoughtful and willing to contribute, people that are very comfortable thinking broadly about issues. Um, when you bring these folks together, you need to set ground rules, just like any meeting, get the ground rules out there. Some very useful ones, I think, for a generative discussion is, um, reduce judgment, sort of open your mind, listen openly to the other points of view. Um, everyone is there for a purpose, and everyone needs to contribute. You don't want people in the meeting to take a back-seat, so how can you do that, how can you manage that. Then you jump into brainstorming possible topics, and one of the challenges I find when I facilitate teams and the word brainstorming is out there is, um, sometimes, people are not very good at brainstorming. They want to pause and discuss things, or they want to explain things, so, possibly, with your ground rules, or at this point, you know, describe what brainstorming is. It's a rapid generation of a wide variety of ideas that are out there and then to be whittled down, which is step four, after you've generated these topics, let's reduce it down, maybe use a priority scheme or some way to put the most important ones on the table. You know, one of the issues, I think, in facilitating or running critical meetings like this is the thoughtful use of powerful questions, and, so, you might want to, before the meeting, look at the ones, the samples we have here, or even generate some of your own, depending on the areas you'll be discussing.

You know, start with a trend analysis. You know, one of the things I like to do in my world is, um, especially after the first of the year, is Google trends in various professions and see what are some of the key thinkers out there thinking about. You know, are any of those relevant to the work we're doing here? You know, what challenges are specifically facing our organization? Maybe take a look at the specific plan and the long-term strategy, are there items in there that maybe, again, are ambiguous or uncertain that you want to look at through a generative lens? Um, I just love this third

one. Ten years from now, will we regret not having the courage or political will to act on some critical, again, crucial issues, what are those issues. What are we shying away from? What are those, as Kevin said earlier, those elephants in the room, that everybody knows is there, and nobody wants to talk about. Um, what's happening in other professions? Maybe we have, um, sister professions or brother professions that are grappling with things that may impact us, or we may have parallel issues to some of the things that they're looking at. And relevancy, yeah, are we still relevant, um, to all of our members. One association I'm working with now is doing a concerted effort to segment their member population in terms of life cycle in the profession, so they're looking at their early career, they're looking at their mid-career, and then they're looking at those members that have gone into leadership, because, really, the issues and needs of those three are vastly different, and if you're not addressing the early career, you're going to see a drop-out of membership. If you're not addressing the mid-career, again, they're not going to renew and be active in the profession, and if you're only addressing the profession as an individual contributor and not in leadership, that group can get disenfranchised. So, lots of ways to look at this, um, but, you know, structure the process, pay attention to the steps, and then look to having these, um, discussions. Kevin, anything you would like to add to that?

>> Kevin Nourse: Yeah. You know, I had a chance to facilitate a conversation, um, using this approach, and one of the things that we did was, um, when we brainstormed possible topics, I passed out post-it notes, and instead of verbalizing it, um, you know, some people think better quietly and, you know, without a lot of noise, I had individuals capture on post-it notes, again, separate topic for a separate post-it note. Then it allowed us to summarize and focus the topics by having all these ideas up. We could reorganize them and sort them and look for commonality and common themes, so in terms of a process and some techniques, to me, that worked out really well. We also then had some proceedings we could summarize more readily after the meeting, which, as we know, is so critical for, um, team effectiveness and group effectiveness. Yeah.

>> Alice Waagen: All right. Well, I think, Kevin, you're going to talk to us next, again, furthering this issue of applying generative thinking.

>> Kevin Nourse: Yep, that's right. So, we've got a number of issues, and, um, we're ready then to do maybe a deeper dive in them, and this may be something we do, again, on an ongoing basis. So, briefly, when we think about what are the steps involved with that, so, again, we may want to identify the focus, who needs to be in the room, any prework that needs to happen prior to the meeting. For example, if we're looking at, um, the issue, say, of future leaders of our association or organization, um, we might think about that as a focus, who could be, you know, important stakeholders that need to be involved. You know, maybe it's some members, maybe it's some board members, maybe it's people who are no longer members of our association, that left for whatever reason, so we can start thinking broadly about that, and then maybe there's some prework, so maybe there's some reading associated with it or some research that went out to inform, you know, to help build knowledge of this topic from different perspectives.

We then, once we come together, we start to explore the underlying why, asking the question why is that, why should we care so much about leadership, why do we worry about a pipeline of leaders, because we get a lot of good wisdom, and we surface a lot of assumptions that will really help us in terms of building alignment around, like, a common frame or a common underlying rationale for why this is such a big issue.

We then start to think about different frames for the issue, in other words, what's the perspective I think about, again, those of you who have done, um, doctoral research, you know part of it is figuring out you've got a topic, but what frame do you want to take? So, for example, I studied, um, resiliency, um, in New Orleans after Hurricane, or during Hurricane Katrina. Do I want to take a psychological frame of how leaders functioned? Do I want to take a social psychology frame and look at the group interaction? Do I want to take more of a sociological frame and look at the larger, um, societal impact of the storm? That kind of thing. So, we try out different frames. What does that open up for us? What does it close down? And then summarize our insights and perspectives. Again, this is as much a learning process as it is a discovery process. So, at this stage, I think, Alice, you were going to take us into an example in terms of asking the question why.

>> Alice Waagen: Yes. Yes, Kevin, and you set this up as a sample idea before, which is, you know, building a pipeline for future leaders for our association. There's an exploratory process we call the five why's. You basically keep asking why over and over again to get to some of the underlying underpinnings of an issue like this. So, in this example, why should we build a pipeline? Well, because when building a pipeline of future leaders, we're creating advocates for our association, people out there that are, you know, promoting the association and its value. Um, we ensure we have members who are ready to step up. I mean, that's what a pipeline is, so when there is a vacancy, we can grab the person immediately and don't have a gap. Um, we can also be enhancing members' careers in their own organizations, if we're building leaders for the association, they can take that learning into their own association. Um, obviously, it's a great attraction and retention tool, and, most importantly, it avoids stagnation, because you're bringing in people with fresh and new ideas. So, again, it's a way to flesh out the value of this issue for further discussion. How important is it? Why should we be paying attention to it? So, Kevin, I think you've got an example of framing for us.

>> Kevin Nourse: Great. So, we've, now we better understand the perspective of the rationale for this topic, now we can start to think about the framing process, and again, we can use a brainstorming approach to this. So, we've got the challenge in the middle, or the key question that we're living with, and notice that we've got different frames, and embedded in each frame is a set of assumptions about underlying cause or potential solution. There's no one right frame, and I think, to me, really, the key is to brainstorm and get as much fresh thinking. That's why when we do generative thinking, having diverse groups with a variety of stakeholders, to me is so essential. So, this gives you, if you think about frame two, how can we identify, so, sourcing potential leaders is different from frame three, which is the developmental process that we go through, or frame four,

which is incentives, and so we know that there's a lot of people that probably would be very good volunteer leaders, however, they lack incentive. Why do they want to do it? It may be more work, but what's in it for them? And that could really speak to incentives or communication that we need to explore. Um, or even determining future skill needs.

So, to me, this is an example, we would probably want to go beyond four frames to figure out, again, what are different perspectives when it comes to this. I wanted to cite a different example. It's interesting, I live in Palm Springs, and I've been volunteering with the Palm Springs pet shelter because I love animals, and I've been looking at how different shelters handle this issue of just ramped animals, and fortunately, this is a no-kill shelter in Palm Springs, but I found this very interesting, um, shelter in Los Angeles. They looked at it a very different way, and I think what's embedded in this is they asked a very different question or use a very different frame. So, typical, um, pet shelters will look at ways to increase the adoption rate, reduce the time in, um, while these animals are at the shelter, looking at social media, you know, all the typical ways to get visibility for pets, and I know the local shelter does a wonderful job at highlighting the pets using the media and whatever, but what I loved was this one shelter. So, instead of looking at it through that lens, their frame was how can we prevent the need for, um, adoptions in the first place, and specifically, how can we help people that are really struggling, maybe financially, to hold on to their pets. So, it alleviates the need for pet shelters so that if we can intervene with families, for example, that maybe are struggling financially or can't afford the vet bills, and we can provide services, in the long run, you know, it's going to pay off, because it's less likely they're going to give up their pet for adoption. So, very innovative ways to think about it, and, again, really, that's the key. I think generative thinking can have a huge linkage to, really, innovative solutions, um, beyond the conventional wisdom, but looking at it from a very, very different perspective. Alice, anything you want to underscore in terms of our concepts of framing?

>> Alice Waagen: I love that example, being a dog-lover myself, because it's pushing the problem up the stream, so to speak. You know, having too many pets up for adoption is a result, and then going to the cause and dealing with the cause, that is a great example. I think everybody can relate to that.

>> Kevin Nourse: Great. Well, I think we're ready for our final reflection question at this point. So, moving into action, the question is what strategies do you think you'll use to conduct a generative thinking or generative discussion within your organization, your sphere of the organization? Maybe a few names or roles of who should attend. If you want to do a pilot, maybe, to test it out. What's the specific topical focus you think might be relevant? And does one ground rule occur to you that you might want to use? Who will facilitate? So, we'd ask those that are in the classroom maybe to focus on a couple things. One would be who should attend, and maybe a specific topical focus. If you could share in the chat, um, chatroom those ideas. For those listening to the recording, go ahead and hit the pause button now, capture some thoughts about how to move into action with generative thinking, and then replay it when you're ready to join us. So,

Alice, do you have any ideas in terms of any of your clients you think could benefit from, um, moving into action with generative thinking?

>> Alice Waagen: Oh, yeah, absolutely, especially the examples I used earlier of my clients who are associations, who are facing, you know, a loss of membership or membership that is very inactive. You know, they may be paying the dues every year, but they're not going to conference, they're not, you know, using the services, and, so, I think that's a huge area. Um, you know, one thing I'll just highlight on your list here, this, by the way, would be a great worksheet for people to use as a planning worksheet for generative discussion. Um, the last thing, who will facilitate, I think that's a really important thing, that if all the people who are attending have strong views on the issue, find a neutral third-party who can keep an eye on the ground rules, on the focus, on the process itself. I always call a good facilitator a process cop, you know, to make sure things don't get out of hand.

>> Kevin Nourse: Great perspective. Yeah, I think about my client who's struggling, um, with the need to become more transformative in his organization as a leadership development path and how he could use this, but let's look to our participants and see what thoughts they have. Um, let's see. So, um, Margot points out, in her case, representative from all the other clinics, preferably more than one from each clinic so there's multiple views represented, there's different disciplines, clinical specialties, how to get their voices in the room. Um, work group for employee satisfaction, Sarah, that's a great example, how to get those voices, um, from different, it could be different generations, could be less tenured, more tenured, um, people of different, um, ethnic or cultural backgrounds. Absolutely, to get different perspectives, we're all kind of looking at the issues through different lenses, so I think those are really great examples. Okay, so, it looks like we're just about ready to wrap-up. Alice, I think you'll take it and, um, move us on here.

>> Alice Waagen: Absolutely. Well, what we hope today is this introduction to generative thinking shows you what a powerful skill it is for leaders to develop. Um, we've given you the definitions, we've given you the process. Definitely, um, use this in your leadership toolkit to really advance the thinking of your organization or the team that you're currently on. Lastly, we love to give you assignments coming out of here. Um, you know, interview three leaders in your organizations to assess what they know about generative thinking. Is this a tool that's in their toolkit? If not, it might be something you might want to introduce. Experiment yourself with a generative thinking approach in your team, um, and especially with the concept of framing, I think that's a very useful concept to use, and also, there is more reading that you can do in the back to further your development. With that, I'd like to pass the mic back to Andrea to wrap us up today.

>> Andrea Falzarano: Thank you, Kevin and Alice, and thank you, everyone, for joining us. This webinar is part of a series in ASHA's Leadership Academy. For more information, including information on continuing education credits, visit www.ASHA.org

and search Leadership Academy. We also encourage you to join the ASHA Community, focused on leadership topics. Go to [ASHA.org](https://www.asha.org) and search Leadership Academy. You will find the link to the online community on this page. This concludes the ASHA Leadership Academy webinar on Generative Thinking. Good-bye from the ASHA National Office.

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