

SENIOR FELLOWS AND FRIENDS

Relaxed, yet attentive.



https://commons.wikimedia.org/wiki/File:Kayakers_in_Redwood_City,_California.jpg

Recap of 8/30/19 Give-and-Take with Adrian Wolfberg: Boundary Crossing for Leaders

Dear Senior Fellows and Friends,

Last Friday afternoon, we gathered by Zoom with Dr. Adrian “Zeke” Wolfberg to discuss his continuing research on boundary crossing. Zeke created and led the crosscutting Knowledge Lab at Defense Intelligence Agency from 2005 to 2010. His work has appeared in publications as diverse as the International Journal of Intelligence and CounterIntelligence, KM Review, Government Executive, and The Society for Organizational Learning's Reflections journal (“Speaking Truth to Power: Nurturing a Reflective Culture at the U.S. Defense Intelligence Agency,” co-authored with Nancy M. Dixon).

Suggested pre-reads were [Problem-Solving in Complex Settings: Techniques for Crossing Organizational Boundaries](#) and “Crossing Boundaries to Build Change,” available at <https://seniorfellowsandfriends.org/portfolio/adrian-wolfberg/>. The idea is to maximize knowledge transfer, cooperation, and collaboration occur across siloed organizational structures in order to facilitate needed change – not easy. Because academic research is not always easy to relate to, either, the session interaction was designed to occur in more frequent

bursts than usual to avoid losing people. The enthusiastic participation that ensued helped Zeke adapt his teaching to a more general audience as he responded to the questions that emerged from our most interesting mix of participants.

Questions and statements that sparked discussion:

What's the big deal about boundaries? How can we overcome the challenges?

Boundaries create distinctions that separate one group from another. It's not a value judgment; it enables work. An example is zip codes, which were created to make addresses more findable and mail delivery faster.

The problem comes when goals change – boundaries prevent renegotiation when things change. Instability becomes a threat to established boundaries.

Words such as **“transfer”** imply that something can be heard by someone else exactly as the speaker meant it. An example of when it may follow that “transfer” works is a business process template that is closely followed, as in a McDonald's franchise. However, what is more common is translating from one language into another, translating between different business functions, or translating concepts across different sectors. In these cases, an exact equivalency doesn't necessarily follow, transfer loses the intended meaning, and translation is needed which is more complex than knowledge transfer. An example of how **“translation”** works is when someone in an organization has an ear to what is going on outside that organization that may initially seem irrelevant, but actually is relevant, and that knowledge needs a facilitator (e.g., a boundary spanner) to help make the outside knowledge absorbable and useful to the inside people. And, even more extreme cases exist when power interests and resource-intensive agendas are so divergent that translation will not even work. Then, you have to find a strategy where a new process or procedure is acceptable, but one that does not threaten interests or agendas. An example of how **“transformation”** works is how people, regardless of interests or agendas, recognize and adhere to traffic safety standards, like traffic lights at intersections.

The role of relationship came up here (see next subheading.)

The role of creating rapport in design thinking (creating a space within which you're speaking the same language) and aligning by means of use cases was described by Lara Lyberg, whose Lab of Forward Thinking at John Hancock is working on a shared goal in “the team sport of blockchain” with colleagues from competing insurance companies. Zeke characterized this as complex (Different insurance organizations, same profession; competitors with different agendas), and saw the use case as a fascinating way to work through the complexity while maintaining integrity and flexibility.

Failure to see the need to or to diagnose the nature of the problem is common. It's very difficult to do the daily work of the organization *and* be innovative. Innovation is destabilizing, unless you're in an innovative organization or one that has carved out space for innovation.

The role of aligning narratives came up here (see next subheading.) Zeke said that innovation can also come from *not* being aligned. This is threatening to some organizational leaders.

John Bersentes, who is working with federal agency partners as a talent management system contractor, observed that generational misalignment is also a source of instability that can threaten the organization and prevent the innovative ideas of fresh mindsets from being taken up.

Connie Berhane, Army Force Management, asked whether the multiple generations in the workforce had any impact on boundary crossing. Zeke said he hasn't studied this. His thinking about generations has focused on the constraints that being a digital native imposes on their capacity for *controlling their own time* and for *using critical thinking*.

After a time check at 1 hour 30 minutes, over half the group elected to continue for another 15 minutes. Zeke's concluding thought was that we don't spend the time and resources to really understand the boundary context, and that by doing so, we could identify the right tools to be used at the right time in the right sequence.

Contributed by Daniel Hultner, USAF:

Article I wrote recently on the Air Force suicide problem, which is largely about facilitating organizational alignment around an aligning narrative and facilitating "weak signal detection" via relationships:

<https://www.linkedin.com/pulse/few-thoughts-air-force-suicide-problem-daniel-hultner/>

Article I wrote for the Strategy Bridge which is about facilitating flexible structure through ground-level autonomy based on alignment to and clarity of organizational values:

<https://thestrategybridge.org/the-bridge/2019/7/8/keeping-off-the-grass>

Some books I brought up that I thought were relevant:

One Mission by Chris Fussell - Almost entirely about facilitating boundary-spanning. A wonderful book that demonstrates the process of creating a team of teams through process/structure/relationships.

Measure What Matters by John Doerr - A beautiful description of how structure (combined with habits of communication and relationships) can facilitate organizational alignment driven by measurable milestones.

Loonshots by Safi Bahcall - I believe it overstates the importance of structure, overly differentiates between innovators and non-innovators, minimizes the role of culture, and fails to adequately capture the non-structural elements that facilitate innovation, but it has some really good stuff in it too.

Participant affiliations:

ASPA National Capital Area Chapter
Department of Commerce (Census Bureau)
Department of Commerce (NOAA Fisheries)
Cornerstone on Demand (talent management software)
Defense Intelligence Agency
HHS contractor
John Hancock Financial Services/Lab of Forward Thinking
U.S. Air Force
U.S. Army

Participants joined the conversation from the DC-MD-VA metro area, Pittsburgh, PA, Colorado Springs, CO, Anchorage, AK, and Honolulu, HI.

Discussion with Zeke will continue.

Since we barely scratched the surface of this critical topic, I'm pleased to announce that Senior Fellows and Friends will host further discussion with Zeke on a quarterly basis. Invitations will arrive via MailChimp as usual.

Participation requires joining via the link in the invitation with computer audio and video enabled, either through your web browser or via the free Zoom app available for phone or tablet. The nonverbal aspect of communication enhances understanding and trust, helping to create an atmosphere like that of the past 15 years' dinner salons in DC. Need help with special circumstances? Contact me when the invitation comes out. Please consider joining us in the future.

Regards,
Kitty Wooley