Reflexions
The SoL Journal on Knowledge, Learning, and Change

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Humble Inquiry
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Communication is essential to healthy relationships, but too often when we interact with people, we end up telling them what we think they need to know. In the process, we miss the opportunity to build relationships based on curiosity and interest in the other person. In today’s increasingly complex, interdependent, and culturally diverse world, this inability to practice what Professor Edgar Schein refers to as “Humble Inquiry” can interfere with our ability to generate bold new ideas, avoid disastrous mistakes, and develop agility and flexibility as a team. In this excerpt from Humble Inquiry: The Gentle Art of Asking Instead of Telling, Schein contrasts Humble Inquiry with other kinds of inquiry and shows the benefits of Humble Inquiry in an organizational setting.

On Communication: Process Consultation, Helping, and Humble Inquiry
Edgar H. Schein

Throughout his career, Reflection’s Founding Editor Edgar Schein has sought to find the most effective ways to intervene in organizational challenges. He learned early on that clients don’t want advice – they want help in improving their interpersonal, group, and organizational processes. Schein came to understand the importance of asking the client what kind of help might be useful before rushing in with advice or action. This emphasis on asking instead of telling has implications for communication within an organization as well. As the world becomes more complex and tasks become more interdependent, coordination is crucial. Through “Humble Inquiry,” team members build the trust necessary for engaging in mutual learning.

Leading the Relational Inversion: From Ego to Eco
C. Otto Scharmer and Katrin Kaufer

In their recent book Leading from the Emerging Future: From Ego-System to Eco-System Economies, Otto Scharmer and Katrin Kaufer contend that meeting the challenges of this century requires updating our economic logic and operating system. We need to shift from an obsolete “ego-system” that focuses entirely on individual well-being to an “eco-system” that emphasizes the well-being of the whole. In this excerpt, the authors focus on a key element of this change: learning how to see ourselves through the eyes of others and of the whole. Three stories offer inspiration for creating the rich new forms of communication needed to build a more resilient, intentional, inclusive, and aware economy.

Disaster as a Springboard for Thriving, Resilient Communities
Bob Stilger

What happens when catastrophe fundamentally shifts the world we know? In March 11, 2011, the triple disasters of earthquake, tsunami, and radiation leak devastated northeastern Japan. In the aftermath of the tragedy, people from throughout the country began to gather not just to share their grief but to consider how they might create a new future together. Numerous initiatives have been launched to experiment with the structures, processes, and practices that create conditions for creativity and collective action. As we enter a time when the world as a whole may experience even more collapsing systems and disasters, the people of Japan – and especially of the Tohoku region – are showing us the way to build healthy and resilient communities.
Healthcare at Its Best: Southcentral Foundation’s Core Concepts Training

Katherine Gottlieb and Michelle Tierney

True transformation, particularly in an organization, is a rare occurrence. It requires unswerving commitment to vision, leadership that is willing to learn, and an organization determined to change in a way that is beneficial to all, not just a select few. To guide it toward achieving its vision of creating a community that enjoys physical, mental, emotional, and spiritual wellness, Southcentral Foundation (SCF), an Alaska Native-owned, nonprofit healthcare organization, worked with SoL to design and implement a foundational program, the Core Concepts Training. SCF’s story not only presents an exemplary model of change but perhaps more importantly illustrates what can be accomplished when people choose to control their own destiny.
Southcentral Foundation (SCF) is a nonprofit healthcare organization serving more than 60,000 Alaska Native and American Indian people in Southcentral Alaska. It was established in 1982 by Cook Inlet Region Inc. (CIRI), one of the Alaska Native regional corporations created by the United States Congress in 1971 under the terms of the Alaska Native Claims Settlement Act. CIRI founded SCF to improve the health and social conditions of Alaska Native people, enhance their culture, and empower individuals and families to take charge of their lives.

The Transition to “Customer-Ownership”
Over the last two decades, Southcentral Foundation’s workforce has grown from fewer than 100 employees to more than 1,600, and its operating budget has increased from $3 million to $227 million. This growth can be attributed in large part to a change in ownership of the Alaska Native healthcare system – from government control to “customer-ownership.”

For 50 years, Alaska Native people in Southcentral Alaska received their healthcare as patients of the Indian Health Service’s Native hospital. It was a large, bureaucratic system centrally controlled from Washington, D.C., 5,000 miles away. Patients had to wait weeks to get an appointment and saw different providers each time. Treatment was inconsistent, care was impersonal, and patients were identified by numbers not names. There was an obvious disconnect between care of the mind and care of the body. Departments and programs acted independently. Patients weren’t happy; employees weren’t happy. Health statistics were bleak.

Under these grim circumstances, many patients left the Alaska Native system to find better care. Along with American Indian people, they began advocating for a voice in program planning and service
In response to this demand, in 1994 Congress passed legislation in favor of self-determination. The new law opened the door for tribes to choose between ownership of their healthcare service or dependence on other entities to deliver the services. For SCF’s Alaska Native leadership team, self-determination was an opportunity to redesign the tribal healthcare system based on Alaska Native values and needs. It was an opportunity for innovation.

By 1999, Alaska Native people were no longer “patients” of a government-run system, but rather self-determined “customers” and “owners” of their tribally managed healthcare system. Alaska Native people were now in control of decision-making and administration. Along with this new status of customer-ownership came a set of responsibilities requiring informed choices, not only for setting priorities for the healthcare system but also for working to sustain the system for future generations. The effort that followed produced a customer-driven overhaul of Native Alaska healthcare delivery and a culturally based redefinition of its philosophy and values. As a result, Southcentral Foundation now has what is known as its “Nuka System of Care,” an integrated healthcare system created, managed, and owned by Alaska Native people with the goal of achieving physical, mental, emotional, and spiritual wellness for all.

Southcentral Foundation’s Vision and Mission

**Vision**
A Native Community that enjoys physical, mental, emotional, and spiritual wellness.

**Mission**
Working together with the Native Community to achieve wellness through health and related services.

**Key Points**

*Shared Responsibility*
We value working together with the individual, the family, and the community. We strive to honor the dignity of every individual. We see the journey to wellness being traveled with shared responsibility and in partnership with those for whom we provide services.

*Commitment to Quality*
We strive to provide the best services for the Native Community. We employ fully qualified staff in all positions, and we commit ourselves to recruiting and training Native staff to meet this need. We structure our organization to optimize the skills and contributions of our staff.

*Shared Vision and Mission*
Southcentral Foundation’s Nuka System of Care reaches beyond merely providing treatment and health education. The system is designed to optimize relationships with individuals, families, and households by supporting them in reaching their multidimensional health and wellness goals. The mission statement emphasizes getting there by working with (not doing to or for) the Native community. It requires looking many years ahead to ensure that improvements in wellness sustain from one generation to the next. The system is as much about prevention and maintaining health as it is about treating symptoms and regaining health.
Service Delivery
In order to achieve its vision, Southcentral Foundation provides a wide range of health and social services. These services include primary care, home-based services, dentistry, optometry, audiology, outpatient behavioral health, residential behavioral health, traditional healing, complementary medicine, health education, and more. Southcentral Foundation measures its progress through a robust data collection effort, benchmarking with other healthcare organizations, and tracking health disparity data at the local, state, and national levels.

Most services are provided “prepaid,” based on legislative agreements and funding requirements to members of 229 federally recognized tribes who live in Anchorage, the Matanuska-Susitna Valley, and 55 rural villages. This service area stretches about 2,000 miles from west to east.

Results
Over the past 14 years, SCF has demonstrated dramatic achievements, with over 70% decrease in hospital admissions and hospital days, and over 30% decrease in outpatient visits. SCF clinical outcome performance exceeds the performance of more than 75% of other healthcare organizations, as measured by the Healthcare Effectiveness Data Information Set (HEDIS).

Customer-owner and staff satisfaction has remained above 90% for many years. SCF’s Nuka system is recognized by the National Committee on Quality Assurance as a Patient Centered Medical Home™ Level Three – the highest level. SCF also received the prestigious Malcolm Baldridge National Quality Award in 2011 from the US Commerce Department. Because of its success, the Nuka system has attracted the attention of healthcare leaders around the world. SCF has been asked to partner with groups from New Zealand, England, China, Sweden, Norway, Australia, and Scotland, among others.

The Seeds of Change:
The Family Wellness Warriors Initiative
In the early 1990s, Southcentral Foundation developed the Family Wellness Warriors Initiative

Southcentral Foundation’s Nuka System of Care is designed to optimize relationships with individuals, families, and households by supporting them in reaching their multidimensional health and wellness goals.
FWWI, which became the foundation for what is known as the Core Concepts Training. FWWI is a prevention program designed to address the needs of adult survivors of domestic violence, child sexual abuse, and child neglect.

The goal of the FWWI program is to end domestic violence, child sexual abuse, and child neglect in the state of Alaska in this generation.

The initiative brings together leaders who represent the Alaska Native community, the faith community, regional corporations and agencies, and healthcare providers in an effort to break the vicious cycle of abuse. Based on a culturally centered resiliency model, the training focuses on identifying protective factors such as social connections, stable family relationships, and community support to help prevent abuse, build resilience, and reduce risk factors. The program gives Alaska Native people an opportunity to experience their history, their stories, their challenges, and their pain. At the same time, it allows them to celebrate successes, healing, and growth by providing intensive training and education community by community in order to gain the trust and commitment of local leaders. As a result of the FWWI training, more than 3,300 people in Alaska stand ready to work toward eliminating all types of abuse within the population.

FWWI's psycho-educational process includes tools and skills that are critical to domestic violence survivors. Being emotionally self-aware, making safe choices, focusing on self-care, understanding how to enter safe and supportive relationships, learning and implementing protective factors, observing and practicing effective boundaries, and embracing empowerment and choice are just a few of the principles taught so individuals can start healing and moving toward healthier relationships. The power of “story” is another critical tool that helps participants evaluate and address the root cause of their behaviors and motivations. A psychologically safe environment is provided so that they may dig down to the depths of their pain and rise up to healing and redemption.

The trainings also work toward eliminating the shame and guilt felt by people harmed by domestic violence; reestablishing the role of parents as protectors of families; making one’s own story coherent; and using spiritual beliefs to reestablish moral and ethical direction. After attending FWWI
trainings, participants report a greater sense of satisfaction and less stress and conflict within the family. “Arrigah House” and “Beauty for Ashes” are initial trainings that provide participants with the opportunity to recognize the impact of trauma, abuse, and neglect in their communities. These intensive programs not only address how to interact with, work with, and respond to those whose lives have been impacted by abuse, neglect, or domestic violence, but also teach how to build protective factors and resiliency skills so people can deal effectively with these chronic issues.

Positive change is evident among FWWI training participants. Participants report a decline in depression, substance abuse, trauma symptomology, and anxiety. They also report an increase in the ability to control anger and a decrease in the risk or threat of intentional harm (either to self or others). Evaluation findings indicate significant positive changes associated with key protective factors, including enhanced family cohesion, cultural connectedness, self-esteem, and spiritual well-being. As a result of FWWI’s instructional approach, participants indicate a high level of content understanding and skills development after completing the training and for the year following the program.

**Development of the Core Concepts Program**

Based on the success of the FWWI program, in 2006, SCF began to develop the Core Concepts Training Program as a way to train employees and transform the organization as a whole. For more than 18 months, SCF worked through the development process, using the ADDIE (Analysis, Design, Development, Implementation, and Evaluation) model.

Southcentral Foundation also developed a partnership with the Society for Organizational Learning (SoL) after several of SCF’s leaders attended SoL’s Core Competencies Course on Organizational Learning. Many of the tools and processes introduced in that course informed the development of the Core Concepts Training.

The development process included several pilots with different populations to ensure that the program would be applicable and well received across the entire organization. Gathering feedback from participants and integrating it into the curriculum of the program was a particularly effective element of the training.

**Analysis**

The first step in developing the training was to determine its purpose and goals. During the first phase, a gap analysis of current state versus future state was completed. The results of that analysis showed a need to enhance employees’ skills so they would be able to support the integration of the FWWI philosophy into Core Concepts and also to create and maintain effective relationships. Healthcare employees have knowledge and expertise in science and medicine – skills that they continually practice throughout their training. But the knowledge, skills, and abilities to create and maintain effective relationships often fall outside of the more traditional healthcare education curriculum. We determined that in order to fully realize our mission and vision, we would have to provide training that included a common language to be used throughout the organization.

**Design**

The second step was to design a training consistent with our mission and goals. During this phase, we focused on developing the objectives,

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**Southcentral Foundation’s Core Concepts**

The Core Concepts are:

- **W**ork together in relationship to learn and grow
- **E**ncourage understanding
- **L**isten with an open mind
- **L**augh and enjoy humor throughout the day
- **N**otice the dignity and value of ourselves and others
- **E**ngage others with compassion
- **S**hare our stories and our hearts
- **S**trive to honor and respect ourselves and others
techniques, tools, structure, materials, and resources needed for successful implementation. We began by identifying existing trainings whose philosophies were consistent with ours, and used those as a basis for building and customizing our own programs.

During the design stage, SoL consultants introduced us to new tools and concepts, including the effect of creative tension, Chris Argyris’s ladder of inference, and David Kantor’s four-player model, which we readily incorporated into our training. SoL also helped us think through our design, engagement, and delivery process for the training and provided guidance to our internal facilitators on teaching and applying its tools and methods.

**Development**

The development phase consisted of producing the training materials and facilitator guides, and running pilot programs. The first pilot included senior executives who we knew would be tough critics but who we also knew were not opposed to the new initiative. We ran three pilots and made significant revisions as a result. We included a cross section of people in each pilot – people of different ages, gender, cultures, and professions. These heterogeneous groups included people who were able to share their stories easily but also those who were more reluctant. The pilots were also instrumental in training our group leaders.

**Implementation**

The next step was implementation, which included the initial roll-out and its evaluation. All SCF leaders participated in the first official training. If the training was to be successful, our leaders would have to demonstrate their support of it by applying what they learned to the day-to-day management and operation of the organization.

**Evaluation**

The final step in the process was evaluation, using Donald Kirkpatrick’s Four Level Evaluation Model for instructional design.

**For Level 1, How well the learners like the process:** We asked participants to complete a survey at the end of the training. In addition, we conducted a large-group debrief, during which participants sat in an open circle. Each participant was given an opportunity to comment. Typically, participants reflected on how meaningful the training was for them personally.

**For Level 2, Learning:** We sent participants a survey within a week of completing the training, to assess what they had learned.

**For Level 3, Behavior:** This evaluation was more conceptual and focused less on the content that managers and employees had learned and more on how they perceived certain behaviors in the workplace. It was done through an employee
For Level 4, Results: We collected customer feedback specifically related to the skills and abilities that comprised the Core Concepts. These surveys included feedback from customer-owners immediately after a visit to a clinician, from an annual survey assessing the overall organization, and from focus groups and one-on-one interviews that identified areas for improvement. Questions focused on how effective people in the system were at listening, responding, connecting, and caring.

As a result of the success of the training, SCF’s Nuka System of Care received the highest level of recognition from the National Committee for Quality Assurances as a Level 3 Patient Centered Medical Home (PCMH). Receiving this award was one indication of how effectively the Core Concepts program supported SCF’s mission, vision, and operational principles.

Key Elements of the Program
Several components were essential to the success of the Core Concepts design. One was that the highest-ranking person in the organization was willing to lead the training. Over the past six years, SCF President and CEO Katherine Gottlieb demonstrated a strong commitment to acting as the lead facilitator of the training.

Another essential component of the training was the willingness of employees to share their personal stories with their learning circles. Because some found doing so difficult or awkward, senior leaders started by sharing their own stories. Katherine Gottlieb shared her personal story on the first day of every training session. By doing this, she served as a role model and a source of encouragement so that employees felt more comfortable and willing to share their own, often painful, stories. This component required an especially strong commitment from the CEO and proved to be essential to the success of the training. While the story itself is an important component of building relationships and trust, the main goal is for everybody to get a better understanding of why they think and act as they do. This increases each person’s capacity for generative listening, compassion for one another, and productive collaboration across all parts of the organization.

An essential component of the training was the willingness of employees to share their personal stories with their learning circles.

The process of reinforcing the training was another key element in the program’s success. This was done by incorporating standards of behavior based on the Core Concepts in job descriptions, in interview questions, and in performance evaluations. An example of this is the expectation that all employees are able to develop, foster, and maintain positive relationships with coworkers and customer-owners. In addition, managers were required to lead groups. They used Core Concepts

Participant Comments

“I feel fortunate to work for an organization that gives me the time and tools to understand myself.”

“I know the story behind the eyes of leadership and they are more human to me.”

“My life is better because of my time working for South-central Foundation. The things I learned at Core Concepts and Beauty for Ashes make me a better father, son, and spouse, and I thank you.”
tools consistently in meetings and in conversations to help them succeed in this role.

Refresher training for staff was also essential for reinforcing new learning and behaviors. In other trainings that used learning circles and sharing story as tools, Core Concepts tools were added to support and build on the common language that reinforced SCF’s mission and vision.

By continuing to be open to modification, we were also able to keep the training fresh. While we did not make significant changes once we began implementation, we did tweak around the edges and make some mid-course corrections. The structure and process of the training, which is mandatory for all employees, supported who we were as an organization. The training intentionally included the practice of working in multidisciplinary teams. For example, rather than having a training exclusively for doctors, each training included employees from all areas of the organization – physicians, administrative support, board members, senior leaders, and other healthcare and technical professionals. This approach demonstrated and underscored what we meant when we talked about shared responsibility and team.

Curriculum
The training is hands-on and interactive. Over the course of three days, every activity and training element prepares participants for sharing stories with their learning circle. This approach has been especially effective for transferring meaning and creating alignment among SCF employees.

Learning occurs in a variety of ways: individually, in pairs, in learning circles, and in large-group discussions. Learning circles, which consist of no more than seven participants and a group leader, are a critical design feature because they create an environment in which participants have time and space to engage and respond. Because participants are able to bring their own knowledge to each session, over time, the role of the group leader/trainer has gradually shifted toward more of a facilitator role. This shift gave the group even more ownership of the process.

A host of other activities were also designed to support learning. We feed the soul with inspirational readings and feed the body with hearty breakfasts and lunches. We also include wellness activities to bring participants back to the program refreshed and ready to reengage. For example, the game musical chairs encourage playfulness; team Pictionary reinforces positive mental models; and energetic aerobic exercise celebrates the experience.

More Than a Training Program
Core Concepts is more than a training program. It is central to the way SCF functions as an organization and therefore requires a commitment from the most senior leaders of the organization. CEO Katherine Gottlieb spends three days with every employee as they share story and learn about how to relate and communicate with each other. She is the first one to share her story, and she leads the training. Leaders are expected to manage and lead in a manner consistent with

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Core Concepts Training Objectives

The objectives of Core Concepts Training are:

- Understand how we impact others by:
  - Understanding your relational style
  - Understanding how your experiences contribute to how you approach others
- Learn how to articulate your story from the heart
  - Understand the power of empathy and compassion for yourself and others
- Understand your personal and professional aspirations
  - Align your aspirations, intentions, and behaviors
  - Understand how you can create shared vision
- Learn methods for good dialogue and productive conversations
  - Understand the impact of intentions
  - Understand how to listen effectively
  - Understand how good dialogue and productive conversations will affect SCF
  - Explore tools for having good conversations
Core Concepts principles and practices. They are also expected to serve as learning circle leaders at least every 18 months and to attend quarterly leadership sessions led by the CEO to refresh and improve their skills. As a result, all employees have the same language and are aligned with the organization’s values.

The last exercise in every Core Concepts program gives each participant the opportunity to share a thought with the whole group. The comments from the employees are inspiring and heartfelt. Employees express feelings of belonging to a family, an organization, and a mission; of feeling heard, valued, and appreciated by their leaders; of understanding and knowing each other and the leadership team on a personal level; and of their commitment to the organization’s vision.

The Core Concepts training was developed to support employees in achieving the organization’s mission and vision. Any organization planning to embark on implementing this kind of training program must understand that it is more than a training. It requires a significant commitment of time, resources, and passion. Top leaders are the role models and the example of what is being done to carry out the organization’s vision. Leadership isn’t a hand-off; it is hands-on in trying to keep systematic and sustainable change moving ahead. Leaders have to put themselves into the effort. At SCF, we believe the effort is worth the investment.

Katherine Gottlieb, MBA, DPS (h.c.), is president/CEO of Southcentral Foundation. She is a tribal member of the villages of Old Harbor and Seldovia, and is an honorary member of Eklutna. In 2004, she was a recipient of the MacArthur “Genius Award.” In 2005, Katherine received an honorary doctoral degree from Alaska Pacific University in recognition of her extraordinary public service.

Michelle Tierney, MPA, is vice president of Organizational Development & Innovation at Southcentral Foundation. Michelle served for many years on the Board of Examiners for the Malcolm Baldrige National Quality Program. She holds master’s degrees in Public Administration and Human and Organizational Systems, and is currently a doctoral candidate.
All too often the job of building an organization’s capacity to better serve its customers, beneficiaries, and workforce is seen as something to be outsourced. The organization’s leaders may give little sustained attention and sponsorship to these efforts beyond formal public introductions, exhortations, and appeals for participation. No matter how well intended these efforts, the lack of deep understanding of what the journey will require from the people who make up the institution – and the failure by senior executives to role model the very values and behaviors they seek to instill in others – sadly diminish or negate the positive impact these initiatives are intended to achieve.

From an organizational learning standpoint, the elements required to build sustained capacity for performance, learning, and growth in a human system are personal and collective aspiration, the ability to have productive conversations – especially when deep and legitimate differences arise – and the capacity to account for multi-temporal systemic and cultural interdependencies in formulating strategies and taking action.

In the case of Southcentral Foundation (SCF), a simple and profound reframing of these elements based on Confucius may be more representative of the context within which the Core Concepts Training initiative took place:

**Virtue:** Having a benevolent purpose and acting ethically in all transactions

**Compassion:** Understanding the implications for people’s lives and focusing on benefit for all

**Action:** Considering multiple perspectives and timeframes and then acting decisively

To understand how these elements affected our work at SCF, we need to appreciate CEO Katherine Gottlieb’s extraordinary commitment to the well-being of the Alaskan Native population. Her commitment stemmed from an intimate understanding of the source and nature of the suffering this population was experiencing as well as a profound belief in the power of the human heart to overcome challenges and realize the promise of a brighter future. This understanding and the deep relationships she had developed over time included both the more traditional tribal culture of the SCF owners and the western cultural dimension of many of the SCF faculty and staff. Katherine’s sense of compassion assured that any program created on her watch would recognize, respect, and account for individual and collective perspectives and benefit the whole. In addition, because Katherine’s personal life story had elements that were deeply rooted in the history of the community and because she was an executive with a strong track record of delivering sustainable results, she was able to engender a condition of trust that was the underpinning of the staff’s willingness to engage.

The design process we embarked upon for the Core Concepts Training, led by Michelle Tierney (SCF’s VP of Organization Development and Innovation), was characterized by ongoing connection to and communication with the
larger SCF community, including key staff members and the executive team. This approach assured that the program we produced would be relevant and effective. We also wanted to be sure that the process we used to design the program reflected the values and behaviors we wanted to create in the organization itself. Pilot and delivery dates were established to generate creative tension and to keep the team focused on delivery. Key design principles, including the selection and creation of human-centered tools and methods and the active participation of senior leaders at each program, were established.

In fact, senior leaders were required to share elements of their own life stories at critical times in the program. Their stories described what made them who they are today, the challenges they needed to face and overcome, and their reasons for choosing and continuing to choose to be members of the SCF family. The design principle of having senior leaders participate in key development programs is well known in the field. However, because it requires a deep commitment and a willingness to speak from the heart rather than delivering well-meaning expressions of altruistic platitudes that do little to build relationships and alignment, it seldom succeeds to the degree it has at SCF.

The stated goal of the Core Concepts Training is to provide employees with the knowledge and tools needed to integrate the core concepts of the Family Wellness Warriors Initiative (FWWI) throughout Southcentral Foundation. I think the program fully accomplishes that goal. I also see the training as a journey that articulates, in a culturally appropriate way, the spiritual and emotional essence of what it feels like to be an honored, generative member and leader in a human community. By participating in the development of this program, I have received infinitely more than I have given and am honored to have been part of SCF’s extraordinary journey.

**ABOUT THE AUTHOR**

Robert Hanig is director of RLH Consulting and a founding member of the Society for Organizational Learning. He currently designs, directs, and delivers management and leadership interventions and programs for the World Bank, the International Finance Corporation, and the International Monetary Fund.

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