

# *INTELLIGENT DISOBEDIENCE*

*DOING RIGHT  
WHEN WHAT*

*YOU'RE TOLD  
TO DO IS WRONG*

## *IRA CHALEFF*

AUTHOR OF THE INTERNATIONAL BESTSELLER  
*THE COURAGEOUS FOLLOWER*

FOREWORD BY

PHILIP G. ZIMBARDO, creator of the Stanford Prison Experiment

and author of *The Lucifer Effect*



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Doing Right When What  
You're Told to Do Is Wrong

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Doing Right When What  
You're Told to Do Is Wrong

Ira Chaleff



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# Intelligent Disobedience

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*To the young and the not so young  
who make decisions to obey or not to obey,  
conscious of their personal responsibility for the outcome  
regardless of which decision they make,  
no matter who gave the order.*

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## PREFACE

# How I Learned About Intelligent Disobedience

**W**HAT EXACTLY IS INTELLIGENT DISOBEDIENCE? I had the same question when I first heard the term. These are two words that don't usually fit together.

We know what obedience is: following orders or rules or established ways of doing things. Obeying usually keeps life running smoothly. Disobedience is a contrary response to these common obligations of life. Disobeying often results in unpleasant consequences. Those issuing the orders or setting the rules are inclined to enforce them, and they usually have the power to do so. Therefore, it's reasonable to ask, under what circumstances can disobedience be considered intelligent?

I suspect you would agree that those with the authority to issue orders or to establish rules are not infallible. You've experienced that reality, perhaps more often than you'd like. In some circumstances, the information on which authorities are basing a specific order or rule may be incomplete, old, or plain wrong. Their intentions may be excellent, but their assessment of the situation and their judgment may be faulty. Or the order may be ethically problematic. In these circumstances, implementing that order or rule would probably lead to an undesirable outcome, perhaps even a dangerous one. It would be better to question the order rather than obey it. That would be Intelligent Disobedience.

This seems like common sense, yet it can be a difficult thing to do. People like to believe they would have the courage to resist an order that would cause harm. Contrary to this belief, research

and history show us that in many situations the majority will obey. Depending on the circumstances, perhaps you would obey.

The purpose of this book is to help individuals at all stages of human development, and in all types of work, achieve the awareness and skills to avoid the “just following orders” trap. Regardless of the pressure we feel to obey those in authority, we are accountable for our actions. We need to be able to take a stand and do the right thing when what we are told to do is wrong. If we do this well, even those issuing the wrong orders will benefit from our having made the right choice.

I first heard the term *Intelligent Disobedience* when I was teaching a class on leader-follower relationships to a group of mid-level managers. We were at the point in the class where I introduce the question “When is it appropriate to obey authority and when should authority be questioned?” This is a central question for all of us who live in complex societies and who work or study in hierarchies in which other people have the authority to give us directions.

A woman seated to my left raised her hand and said,

*“I have an example of this under the table.”*

The whole class joined me in a moment of collectively being startled by her statement. What did she mean, “under the table”?

Her classmates had stopped paying attention to the unusual act of bringing a dog to class every morning. She was low key about it and the dog rested quietly, almost invisibly, at her feet. I taught only one day of the students’ two-week course. In my focus on making sure the room and equipment were properly set up, I had failed to register this student was accompanied by a dog. So much for my powers of observation!

She went on to explain,

*“I am helping to train a guide dog that will assist an individual who is blind. At my stage of training, the dog is learning to be comfortable in busy social situations and to obey all the basic*

*commands she will be given when working as a guide dog. When I finish this part of her program, she will go to a more skilled trainer who will teach her Intelligent Disobedience."*

My ears perked up more or less like a dog that has just heard something that grabs its attention!

"What do you mean by Intelligent Disobedience?" I asked, intuitively attracted to this term I had never heard before.

"Most of the time," she continued, "it's really important that the dog obeys the human's instructions. But sometimes it would be dangerous to do so; for example, when a man with limited sight gave the command to step off a curb just as a quiet hybrid car was turning into the street. The dog must know not to obey a command that will put the team—human and dog—in danger. Learning not to obey is a higher order of skill. It will require a trainer who is more experienced than I am."

Here was an example right under my nose of what I had been thinking and writing about for fifteen years! It is part of the socialization process in any human culture to teach our young to obey. Some cultures do it in harsh, authoritarian ways, and others do so more gently. However it is accomplished, children must be responsive to formal authority as they grow into adulthood. As adults, they must be responsive to the formal authorities in their organizations' chains of command.

If the kindergarten teacher asks everyone to rest quietly for fifteen minutes, the students must do so and not pester the kids next to them whose eyes are closed. If the football coach says no partying the night before the game, a player must resist temptation from peer pressure to party or face being sidelined. The examples are endless of how we teach and reinforce the obedience that the culture requires.

But how do we teach obedience without teaching it *too well*? This isn't a question that is sufficiently considered. There are enough

examples of young people acting out in *defiance* of authority that, understandably, the attention goes to correcting or penalizing this deviance. Though the defiant might create social nuisances at times, they are not necessarily a danger. They may even prove to be productively rebellious innovators!

The danger lies in teaching obedience too well, so the habit of unquestioning obedience is carried into adulthood. We see the results of this when employees in corporations, government agencies, the military, and elsewhere bow to pressure to do things that cover up problems and create unnecessary risk or damage. Even more disturbing are the number of historic events in which crimes against humanity have been committed because people were “just following orders.”

This book will examine how the skills of Intelligent Disobedience can be taught and exercised in a variety of settings and why they are, literally, a matter of life and death in many of those settings. It will show why the smart parent, teacher, or organization leader will value Intelligent Disobedience and how they can foster it. Whatever your own role, it will help you develop the skills and strategies to do right even when under social pressure to do something you believe is wrong.

A guide dog that is entrusted with the safety of a human being cannot afford to make a serious error even once. Without knowing when and how to disobey, guide dogs would lose their value of keeping the team safe. We have something important to learn from the training given to these best of man’s best friends and how to adapt it to human development.



## FOREWORD

FRENCH PHILOSOPHER PAUL RICOEUR introduced the concept of the “servile will” in *The Symbolism of Evil*, (1960).<sup>1</sup> The servile will is the will that makes itself a slave to authority. It diminishes human nature. Such a mental state, although seemingly extreme, is more commonplace than we would like to believe. There is a sense of freedom in liberating oneself from a will that is enslaved.

From our earliest socialization, we are rewarded for obeying all authorities: parents, teachers, religious leaders, politicians, and more. Nowhere in our educational system, or even our social system of values, is there training in appropriate disobedience or simply to distinguish between obedience to just authority and defying unjust authority.

In our private and public institutions, we see perennial catastrophic results of this failure among adults who should know better, but conform, comply, and obey anyone who conveys a sense of authority. In the schooling of our young, we see patterns of obedience being formed that lead to misplaced obedience when they become the adults in those institutions. Where do we turn to for fresh answers to striking the right balance between obedience to authority and independent choice?

We can turn to two places. First we turn to traditional social sciences for research-based answers and maybe solutions. Then we turn in a totally new direction, to be revealed to you in this remarkable book, about what we can learn from the training of trusted guide dogs who are taught what is called Intelligent Disobedience.

It has been a half century since the great social science experiments on authority and obedience, first by Stanley Milgram at Yale

University in the 1960s, then followed by my Stanford Prison Experiment in the early 1970s. Milgram's work revealed that among ordinary citizens, two-thirds were willing to deliver painful shocks at the insistence of an authority who was a stranger to them. The good news in that research program was that when participants observed people like themselves refusing to deliver the painful shocks, then 90 percent of them refused. That means we are prone to obey authority, but also affected by the behavior of our peers. Thus we are all social role models, and what we do—for good or for bad—has a ripple effect when other people observe us.

My research at Stanford University extended the Milgram paradigm away from a single authority issuing commands to having participants embedded in a social context where the power resided in the situation. Normal, healthy college students, randomly assigned roles of prisoner or guard, lived in a simulated prison setting—prisoners did so day and night, the guards for eight-hour shifts. We intended the study to run for two weeks but had to terminate it after six days because it had run out of control.

Our goal was to create the mindset in these college student participants that they were real prisoners and real guards in a real prison. That goal was accomplished far beyond what I could imagine when we began. In the contest between good people and evil situation, humanity lost and the situation won. Put differently, the dispositions of the individuals predicted nothing about how they behaved in either condition when overwhelmed by a powerful, novel social setting.

Even I was caught up in the power of that situation by mistakenly playing dual roles of principal investigator and prison superintendent. In the latter role, I became indifferent to the suffering of these young men, allowing the guard abuse that emerged to continue much longer than it should have. The takeaway message from this study is that human behavior is more under the control of situational influences



than we want to believe, as we continue to cherish the concept of freedom of the will and inner determination of our behavior.

More recently, I have been conducting research in the Netherlands and Sicily, with my colleague Piero Bocchiaro, to illuminate the conditions that can lead to disobedience to unjust authority. We introduce the concept of productive disobedience, an act of peaceful noncompliance with laws or norms or the demands of authority that, if followed, would hinder the moral progress of society.

What happens when a scenario is described to college students that clearly depicts an authority figure making unethical and unjust demands on student participants, and they describe how they would react? The vast majority report they would rebel; however, when their classmates are actually put into that very same situation, just the opposite occurs—more than 80 percent blindly obey! This again reveals the power of situational norms to dominate moral reasoning.

Our only bright light was discovering that those high on the anti-authoritarian personality trait were best able to be defiant. We found disobedience could be enhanced when in the presence of student rebels and when obedience had a high personal cost. The overall high rate of obedience to authority was, however, distressingly high.

Despite my proselytizing these messages for many years, humanity is no closer to having absorbed the lessons of these experiments than it was before they were made part of our social consciousness. In our private and public institutions, we still see perennial catastrophic results of this failure among adults who should know better. It is evident in the schooling of our young where we see patterns of rigid obedience being formed from day one by teachers and officials. This leads, in turn, to misplaced obedience when these students become the adults and taxpayers supporting those institutions. Nowhere is there any attempt to teach the fundamental difference between just and unjust authority, the former earning our respect, the latter justifying disobedience and rebellion.

Where do we turn for fresh answers for striking the right balance between rigid, mindless obedience to authority and independent choice? Our society gives lip service to creating independent thinkers as a primary result of all education. But so far, there is not much to show for the success of that ideal.

I was surprised to discover the answers I was seeking in this remarkable book by Ira Chaleff. He offers us a metaphor and an effective model from “man’s best friend.” It is clear that we painstakingly teach guide dogs how to discern between when to obey and when to resist in order to avoid causing harm if given dangerous commands. Surely, we can do the same in the acculturation of our young and the development of our professionals in the highly sensitive roles that our society gives them to make things run properly. Whether training teachers for classroom management, guards for the security roles that have become ubiquitous, or information specialists who control our privacy and the protection of our identity, it is crucial to develop new ways of distinguishing between appropriate obedience and rightful disobedience.

Reading this remarkable book has given me new hope for the prospect of humanity finally learning the overdue lessons needed to cope effectively with the many urgent challenges of our times. I do hope that you, dear reader, will also learn and apply the vital messages contained in *Intelligent Disobedience*. It is our communal responsibility to see that its lessons will be taught in relevant ways at every stage of human and professional development—to our youth, as well as to our social, religious, business, and political leaders.

*Philip Zimbardo*  
*Creator of the Stanford Prison Experiment, 2014*

## INTRODUCTION

# Creating Cultures that Do the Right Thing

*I*NTELLIGENT DISOBEDIENCE IS ABOUT finding the healthy balance for living in a system with rules and authorities while maintaining our own responsibility for the actions we take.

In recent years, a school of thought emerged regarding different types of intelligence. Knowing when and how to obey or disobey authority can be considered a form of intelligence that incorporates both interpersonal skills and moral grounding.

Obedience is often a reflex, not a rational decision. There is a primal instinct to obey authority, reinforced by a steep price for violating social norms. Reflexive rather than thinking obedience sooner or later leads to poor or damaging outcomes.

The project of this book is to examine how to change that reflexive habit into a conscious choice of whether to obey or to dissent in a specific situation. On a larger scale, its aspiration is to encourage the culture to embrace Intelligent Disobedience as a valued aspect of one's identity and an antidote to authoritarianism.

Nearly daily, we find stories in the media of individuals and whole departments who went along with programs or orders that came from higher levels in- or outside their organization that defy common sense, our values as a people, or the law of the land.

No segment of our culture is immune, from politics to sports, from federal agencies to religious institutions, from the education system to law enforcement, from health care to transportation, from food production and distribution to communications, from the military to financial services, from energy to social services.

You've read these stories or seen them in the media and, like me, wondered, *How could they have done that?* The question now is *How do we change this?*

Change will be achieved by teaching and rewarding the skills to differentiate between programs or orders that should be embraced and those that should be questioned, examined, and at times resisted. The capacity to do this should be an integral part of risk management strategies, which exist in all sectors.

If we distill Intelligent Disobedience down to a formula, it would look something like this:

1. Understand the mission of the organization or group, the goals of the activity of which you are a part, and the values that guide how to achieve those goals.
2. When you receive an order that does not seem appropriate to the mission, goals, and values, clarify the order as needed, then pause to further examine the problem with it, whether that involves its safety, effectiveness, cultural sensitivity, legality, morality, or common decency.
3. Make a conscious choice whether to comply with the order or to resist it and offer an acceptable alternative when there is one.
4. Assume personal accountability for your choice, recognizing that if you obey the order, you are still accountable regardless of who issued the order.

Formulas give us a sense of where we are going but are not sufficient to transform deeply seated cultural patterns. Transformation requires first understanding the powerful social mechanisms that produce and reward obedience, regardless of the merit or lack of merit in what is being obeyed. Then strategies and tools for overriding these mechanisms and retaining independence of thought and action are needed.

I did not start writing this book because I had the answers for how to do this. I began writing because I wanted to learn more about the answers. That requires a journey. When an author embarks on such a journey, in a sense the author is in service to the book. As the book unfolds, it insists the author look more deeply into the matters under investigation.

The author can report a symptom, but the book demands to know what is the underlying disease? The author can identify the disease and the book insists on knowing what caused it? What are its triggers? The author digs deeper and identifies causes for the disease and the book says, now what? Are there cures for this disease? If so, please share them with the reader. If not, how can we manage the disease until a cure is found? What are lines of investigation the reader and other researchers can follow to develop better ways of managing and ultimately curing the disease?

This book has taken me on such a journey. Professionally, I work as a consultant and a coach to adults who make our government agencies, armed services, corporations, professional service firms, nonprofit associations, and universities run. I have seen these organizations from the bottom and from the top. I know the pressures that exist at different levels and the difficult choices that have to be made about what is the right thing to do in different situations.

I could have written this book to solely address these professional environments. The reader would have recognized the book as a work about organizational behavior and ethical and operational choices. But if I left the book at that level, we would have been examining the symptoms or, at best, the disease. We would not have explored the causes of the condition and the remedies for those causes.

Let me put it this way: no executive, manager, front-line worker, administrator, principal or teacher, officer or foot soldier sprang fully formed from Zeus's head. They—you—were raised in a family that was embedded in a culture, and each family, culture, and subculture within that culture developed ways of socializing its young, including you.

In contemporary society, socialization occurs most intensively in a formal school setting. If we include preschool and kindergarten, most of us spend nearly two hundred days a year for at least fourteen years in a system that is not only expected to educate us, but requires us to recognize and obey the authorities and rules of the system. When behavior shows up in our adult life at work, in the military, in our citizenship, it has been shaped to some degree by social forces that run deep. This book is going to take you diving below the surface of your working world into these formative conditions. Why?

There are at least three compelling reasons for you to accompany me on this journey. First, it is the intention of this book to help you as an individual alter some of the conditioning that is not serving you or your workplace well; it is difficult to do this without understanding the nature of the forces that are holding existing behaviors of obedience in place.

Second, if you are an executive, manager, supervisor, officer, minister, teacher, or anyone with others in your care, and you want to create an environment in which individuals hold themselves personally accountable for doing the right thing, you need to understand the underlying, shaping forces working against this in order to transform those forces.

Third, you are not only your professional role. You are a whole person. I am writing to the whole person. You may have, or expect to have children, or you may be an aunt or uncle, a mentor, a coach, or otherwise a steward of the next generation. How are those children being raised? Will the meta-messages they are getting in the current system equip them to be strong adults who can take difficult stands and to be strong citizens who can protect the values of our culture? You cannot “outsource” their moral development to the formal education process or even to the religious education process. You are part of their moral development, and you are their advocate in the system to which you entrust their development.

I am asking you to join me in an inquiry. We will:

- ◆ Look at the cultural forces that implicitly and explicitly value obedience over the higher level skill of discerning when it is and is not right to obey
- ◆ Glean scarce but useful lessons from education and training that support knowing when and how to intelligently disobey
- ◆ Examine critical research on reducing the pressure for individuals to conform and obey when they should not
- ◆ Look at cautionary examples of individuals who obeyed when they should not have and the price they paid for doing so
- ◆ Learn from uplifting examples of individuals who did the right thing when told to do the wrong thing
- ◆ Meet wise and accomplished leaders who have developed the capacity to do the right thing in those whom they serve
- ◆ Consider how the attributes of Intelligent Disobedience are central to a culture that values accountability, human dignity, and creative innovation

This book will flow among different levels of our lives—our work lives, our education lives, our home lives, back to our work lives. Understanding appropriate obedience and Intelligent Disobedience at each level will reinforce our capacity to create the right balance between these at the other levels. Throughout the journey, the image of the guide dog will accompany us, utterly devoted to obeying when doing so serves the common good and to disobeying when doing so prevents avoidable harm. We will look closely at the “secret sauce” that goes into guide dog training and distill what of this can be transferred to human development and cultural change.

There is one cautionary note I must make, though I find doing so painful. In the United States, and undoubtedly in other countries,

the dominant culture is given more leeway to disobey than are others. As we have seen far too often in the United States, when people of color, and especially young men of color, even hesitate momentarily to obey, they can pay a very steep price at the hands of those with authority, especially when that authority is armed. I caution anyone reading this book to be mindful of unwritten cultural norms and factor those into your decisions on when to obey and when and how to intelligently disobey.

Although this book explores the social roots of obedience, it is primarily a book intended for application. I am not generally a fan of distilling complex dynamics to actionable bullet points. I have nevertheless done so at the end of each chapter to aid application. In many of the chapters, the research and lessons examined contain too many riches to easily retain in one reading. Rather than risk letting them be lost, I chose to risk oversimplifying them. The task falls to you to integrate these summaries meaningfully into your thinking and actions.

You now have a map for the journey you will be taking from the workplace to the school room to the dinner table, back to the workplace, and ultimately to the responsibilities of a free citizenry. Let's start the inquiry by looking at a concrete example. It is critical to take this material out of the theoretical and the ideal into the hard realities of the world in which they play out—in other words into your world.





## CHAPTER ONE

# The Pressure to Obey: What Would You Do?

I WAS TEACHING A CLASS on courageous followership to a group of doctoral candidates at a Methodist university. Courageous followership is a way of being in relation to leaders. It requires giving those in leadership roles genuine support and building relationships with them that will allow those in follower roles to speak candidly when needed to prevent or correct leadership failures. It was a great class with lots of lively, engaged dialogue. During a break, one of the students came up to me and told a story that made a deep impression on me. This story happened twenty years prior to our conversation.

*She had been a young nurse, fresh out of nursing school and assigned to a hospital emergency room. A cardiac patient was rushed in. After a quick assessment, the emergency room physician ordered her to administer the medication he judged the patient needed. She was stunned because she had been taught that this particular medication carried grave risks for a cardiac patient.*

For a moment, put yourself in her shoes—in those days, probably uniform white shoes. This was an era when nearly all physicians were male, all nurses female, so the gender-based inequality of power was pronounced. The physician was older and more experienced, so this added to the perceived power differential. And, after all, he was a physician, with years more training than she had! Can you feel how many social forces were at work pushing her to snap to and do what she was told? Can you sense the time pressure to act one way or another with a cardiac patient's life at stake?

*She confided that she did not know where the needed courage came from to speak back to this authority figure. She told the doctor that she had been taught that particular medication could be fatal in this patient's situation.*

What was the doctor's response? As is so often the case with someone in authority, he bristled at the questioning of his decision and in a raised voice, with a stern glare told her, "*You just do it!*"

Imagine yourself in that moment. You are in an emergency room. You chose nursing as a profession to help people. You want to be a competent, caring professional. If you act against your training and administer the medication and the patient dies, how are you going to feel? How will you face the patient's family? How will you face a review board that examines actions that were taken? There is no "do-over." But what if the doctor is right and you disobey? What if your refusal to act endangers the life you are trying to save? How will you live with that? And what will be the repercussions of disobedience on your career that you have just spent several years preparing for?

*There's no time to hesitate. What would you do?*

Seriously, what would you do?

We don't face such obvious life and death choices like this every day, but it is just such a choice that requires us to think about our accountability for obeying or disobeying, regardless of who gave the order. And it gives us a chance to mentally rehearse what it feels like to be under great pressure from an authority figure to do something we feel may be wrong, or even very wrong. When under pressure like this, our ability to make rational or moral calculations may freeze as we are flooded with stress hormones. Our ability to think outside the two choices—obey or disobey—may shut us off from productive alternative responses. The decision to question a forcefully given order usually must be made in a situation of high emotional stress.

Will that excuse the choice you make? Will that allow you to fall back on “I was just following orders”?

If you’ve allowed yourself to feel what this young nurse must have been feeling, you realize that you’re at the point where you are going to need to take a deep breath, pump some oxygen to the brain, and quiet your fear sufficiently to make a principled decision.

So I invite you to actually do that now, to keep experiencing what she must have felt like. Take a deep breath. Take a moment. Think about alternatives to responding to the situation you suddenly find yourself in.

Now let’s return to the emergency room to see what the young nurse did. This is a paraphrase of what she told me:

*“I hooked up the IV bag to the patient, and I injected the medication the doctor had ordered into the bag. Then I called the doctor over and told him the medication was ready to be administered. All that was needed was to open the valve on the IV bag, but that I couldn’t do it because it violated my training. He would need to open the valve himself.”*

Do you see how she found a stance that was neither obeying nor disobeying, but stayed true to the principles she had been taught? Most of the groups to which I tell the story at this point let out low sounds of admiration for the way this newly minted professional found the composure to hold her ground. I certainly do. I am not at all sure that I would have had the presence of mind to generate the option she chose in that intense situation. That is the value of sharing stories. They mentally rehearse us for times when we find ourselves in similar, intense situations.

What was the outcome of this story?

*The nurse’s requirement that the doctor himself open the valve, if he was indeed convinced that his order was correct, stopped him in his tracks. It was enough to get him to rethink the risks and the other*

*options that were available. He changed his order to administer a different medication, which the nurse promptly did. The patient recovered fully.*

What was going on here? Was this an incompetent doctor? Probably not. Just as we put ourselves in the nurse's shoes, we need to put ourselves in the doctor's shoes. He may have been doing his residency at the hospital, a requirement for all physicians. Hospital residencies are infamous for the brutally long hours they require, particularly in the period this occurred. It could be that he was sleep deprived and that his own mental processes were operating at a reduced level. Emergency rooms can be particularly hectic places where the patient load suddenly spikes as several ambulances arrive at once, or violently ill patients begin retching or having seizures in the waiting area. Maybe the doctor himself had a touch of illness he was working over.

None of these conjectures are to excuse bad decisions; they are offered to humanize the authority figure. Whether a doctor, factory manager, fast-food supervisor, school principal, financial executive, or athletic coach, sometimes those in authority are not at their best, yet the responsibilities of their position require them to act. We must be able to see them as both having legitimate authority and human frailty, and at times be prepared to question them, correct them, or even disobey them. Because we can't say "we were just following orders."

Remember that nurse. There is one great role model, whatever your profession.

A few initial lessons we can glean from our engagement with this story:

1. The need for Intelligent Disobedience can arise suddenly and demand a high order of poise to respond appropriately within the compressed time the situation demands.
2. We must give our own perceptions, training, and values equal validity to the perspectives of those in authority when weighing the right course of action.
3. There are often options other than “obey” or “disobey” that can lead to better outcomes.
4. If we take a deep breath and pause to think, we may be able to offer alternative creative responses that satisfy the authority and better meet the need of the situation.



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