



Principles  
& Practices for  
Developmentally  
Aware Teaching  
& Mentoring

By Abigail Lynam

# Principles and Practices for Developmentally Aware Teaching and Mentoring in Higher Education

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**Abstract:** Understanding one's own development as an educator, as well as the developmental diversity of students can have a significant impact on how educators approach teaching, mentorship, and design learning experiences. Developmentally informed educators recognize the phases of development that students are likely to be in and adapt their teaching accordingly. Recognizing developmental diversity, they adjust the outcomes, processes, and mentoring to meet the students where they are developmentally. Without this awareness and knowledge, educational programs are more likely to teach for particular forms of development, which provide an appropriate stretch for some students but not for others. In addition, educators may be more likely to project their own developmental needs onto students, teaching who they are, rather than who is in front of them. This article offers a review of adult development theory, specifically O'Fallon's STAGES model, and its application to teaching and learning. It includes the results of research on the impact of learning about adult development for faculty and students in a graduate program and the findings of additional research on the meaning-making and perspective-taking of educators through the stages of development. It concludes with practical insights and principles for teaching and mentoring developmentally.

**Keywords:** Adult development, adult learning, constructive development theory, ego development, higher education, STAGES, transformative learning.

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## Introduction

Learning about adult development theory and practice has transformed how I approach teaching and mentorship possibly more than anything else I have learned in my twenty years of teaching. And since I first learned about adult development, my understanding and application of this learning has continued to deepen and evolve.

This article offers a review of adult development theory, specifically O’Fallon’s STAGES model and its application to teaching and learning. It includes the results of research on the impact of learning about adult development for faculty and students in a graduate program, the findings of additional research on the meaning-making and perspective-taking of educators through the stages of development, and practical insights for teaching and mentoring.

Five years into teaching for transformative post-secondary programs in sustainability leadership, it became evident that some students thrived in the curriculum, adopting the ecological and social justice values, perspectives, and related behaviors that the program taught towards, and others didn’t. After learning there are empirically-based maps of how adults develop cognitively, emotionally, behaviorally, and spiritually – I thought I had found the tool that would more effectively transform students’ worldviews. Ten years into research and study, I took a 180 degree turn. I no longer sought to transform another, but rather to meet students where they are in their developmental unfolding, and to support them on their growing edges. I also began to recognize my own and the programs’ tendencies to teach for a particular form of development and saw that this was only a fit for a portion of the students. And I saw my tendencies to teach to my own developmental edges; essentially to project my own developmental needs onto the students and to teach ‘who I was’, rather than to who the students were becoming.

During the process of learning about adult development and its application in education, I wanted to understand more about how development shapes teaching, mentorship, and learning needs. I also wondered how learning about development, one’s own and others’, might impact students and faculty in higher education. I conducted research to find answers to questions such as: How does taking a developmental assessment impact students and faculty?; How might learning about development effect an individual’s development?; How might learning about development effect student’s relationships with faculty and vice versa?; What happens when the developmental range of students is wider than the faculty? In addition to the research, I collaborated with Terri O’Fallon to create a STAGES specialty assessment for educators, which supported additional research into the meaning making and identities of educators. This article reviews the results of the research, and lessons learned from teaching developmentally, as well as teaching *about* adult development in professional and academic contexts.

## Adult Learning

Adult learning is a complex and diverse field of theory and practice and therefore can be challenging to define:

Perspectives on adult learning have changed dramatically over the decades. Adult learning has been viewed as a process of being freed from the oppression of being illiterate, a means of gaining knowledge and skills, a way to satisfy learner needs, and a process of critical self-reflection that can lead to transformation. The phenomenon of adult learning is complex and difficult to capture in any one definition. (Cranton, 1994, p. 1)

Developmental researcher and educator, O’Fallon speaks to this when she says “there is a different educational theory for every developmental perspective”, making the point that educators operating from different stages of meaning making are drawn to and enact different educational theories (2011, para. 3). There are multiple dimensions of diversity, including for example family backgrounds, learning styles, age, and ethnicity, all of which influence learning needs and interests. And there is a “hidden form of diversity” which Drago-Severson calls “the new pluralism” (2004a), that functions like an internal operating system in the individual. The developmental diversity of both the educators and their students, has implications for teaching and learning.

In addition to the diversity of individuals in a teaching/learning context, the rapidly changing contexts of our lives in the twenty first century also informs the needs and aims of adult education. The aims of adult education have often been stated as preparing adults to participate in the domains of work, family, and society (Merriam & Caffarella, 2006). However, accelerating complexity and the rate of change in our increasingly global world calls for “innovative habits of learning as a way to better manage work/life situations” (Goleman, 1997; Goleman et al, 2002; Heifetz, 1994). The ability to think systematically and to bridge differences through perspective-taking increasingly becomes an imperative if we are to thrive in our more interdependent global society and constructively engage with complex global issues (Harris, 2002).

## **Adult Development, Teaching, and Learning**

Adult developmental theory derives from 50 years of longitudinal grounded theory and probability research and offers insight into the particular developmental needs of students. It also contributes to understanding how an educators’ development influences and interacts with student’s development and how to work with the developmental diversity of a cohort of students to better support learning for all (Cook-Greuter, 2013; Drago-Severson, 2004; Kegan, 1994; O’Fallon, 2016).

Developmental patterns include widening frames of identity, care, and responsibility (from oneself, to one’s family or community, to all of humanity, the planet, and the cosmos). Thinking patterns move developmentally from black and white thinking, to either/or, to both/and, to paradoxical and integrative thinking. In addition, there are increasing perspective taking capacities (1<sup>st</sup>, 2<sup>nd</sup>, 3<sup>rd</sup>, 4<sup>th</sup> and beyond) and an iteration of learning patterns within each tier of development (O’Fallon, 2016). All of these patterns are applicable to teaching and learning.

Developmental researchers and practitioners refer to developmental maps as a spectrum of compassion (Cook-Greuter, 2013; O’Fallon, 2016), because the maps can support increased understanding and valuing of multiple ways of being in the world. Each developmental phase,

either active or latent as a capacity within each of us, offers both gifts and blind spots. The maps also offer insight into the developmental process – that there are times in a person’s life where they are opening to new ways of seeing, times where they are stabilizing and integrating new insights, and times where they are learning to be active in the world with these new capacities. Learning is fundamentally a developmental process and understanding more about these developmental patterns informs teaching and learning.

## Constructive Development Theory

Constructive-developmental theory is based on the assumption that everyone has a lens through which they experience the world, and this lens shapes the reality that each person experiences and the meaning they make of it. Research reveals that these meaning-making systems develop over time and with patterns that are relatively consistent across gender, socio-cultural context, and other personality differences (Cook-Greuter, 2013).

Constructive-developmental theory for ego development was created by Jane Loevinger (1976) and expanded upon by Torbert (2004), Cook-Greuter (2013), and O’Fallon (2016). It integrates cognitive (thinking), affective (being or identity), and behavioral (doing) development. According to Harvard professor Robert Kegan,

What gradually happens is not just a linear accretion of more and more that one can look at or think about, but a qualitative shift in the very shape of the window or lens through which one looks at the world. (2002, p. 148)

An individual’s developmental center of gravity influences how they make meaning, what they are aware of and therefore able to act upon, how they orient to feedback, their perspective-taking capacities, and their tendencies with regards to thinking patterns (Cook-Greuter, 2013; O’Fallon, 2016). Individuals’ stages of development also affect the kind of support and challenges that they need as learners. Table 1 details the differing stages names used by different theorists.

**Table 1.** Comparing Developmental Stage Names.

| Kegan<br>Stages of Development            | Cook-Greuter<br>Ego Development<br>Stages (1986, 2002) | Torbert<br>Action Logics<br>(1991, 2004) | O’Fallon<br>STAGES: Person<br>Perspectives (2016) |
|---|--|--|---|
|   |  |  | 6.5 Illumined                                     |
| Stage 5: Inter-<br>individual/Post-modern | 6 Unitive  | Ironist                                  | 6.0 Universal                                     |
|   | 5/6 Construct-aware                                    | Alchemist                                | 5.5 Transpersonal                                 |
|   | 5 Autonomous   | Strategist                               | 5.0 Construct Aware                               |
| Stage 4: Institutional/<br>Modern         | 4/5 Individualist                                      | Individualist                            | 4.5 Strategist                                    |
|   | 4 Conscientious  | Achiever                                 | 4.0 Pluralist                                     |
|   |  |  | 3.5 Achiever                                      |

|  |     |                |             |                   |
|--|-----|----------------|-------------|-------------------|
| Stage 3: Interpersonal/<br>Traditional | 3/4 | Self-Conscious | Expert      | 3.0 Expert        |
|  | 3   | Conformist     | Diplomat    | 2.5 Conformist    |
|  |     |                |             | 2.0 Rule Oriented |
| Stage 2:<br>Imperial                   | 2/3 | Self-defensive | Opportunist | 1.5 Opportunist   |
|  | 2   | Impulsive      | Impulsive   | 1.0 Impulsive     |

## Core Assumptions

Constructive-developmental theory shares the following summarized assumptions (Cook Greuter, 2004, McCauley, et al. 2006, p. 636):

- People actively construct their understanding and ways of making sense of themselves and the world.
- Growth occurs in a logical progression of stages, evolving from less to more complex.
- Later stages are reached only by journeying through earlier stages—each stage transcends and includes previous stages. The movement is often likened to an ever-widening spiral of development.
- Each later stage is more differentiated, inclusive, and integrated—and capable of more optimal functioning in a complex and changing world. Later stages are not better in any absolute sense, but may be better (i.e., more adequate) in a relative sense.
- As development unfolds, tolerance for difference and ambiguity increases, while defenses decrease.
- Development occurs through interplay between the person and the environment, not just one or the other.
- A person’s stage of development influences what someone notices or can become aware of, and therefore, what they can describe, articulate, reflect on, influence. and change.

## Caveats

When discussing development, it is important to remember that humans are complex beings and how they think and behave is influenced by a variety of factors, their stage of development being only one of these factors. Don Beck who researches the development of value systems, talks about a value system being like a musical note while its expression is more like a chord or a melody (1996).

Developmental psychology, while discovering patterns that appear to be cross-cultural, is also an approximation of complex phenomena that may never be fully understood. It is essential that this theory, like all theories be held lightly, with the awareness that even while it offers insights, it is also partial in its understanding. The intention is not to box or limit people to a particular stage, but to support their liberation by understanding where they are and meeting them there in a way that can support growth and transformation. Additionally, as Cook-Greuter (2013) notes, these models and their stages are idealizations of how adults develop. The actual lived and embodied expressions of these developmental stages are different from the idealizations.

A foundational developmental ethic is that later levels are not intrinsically better than earlier levels, nor is someone a better person just for having a more complex meaning system. There are unique capacities that emerge with later stages that may be more adequate for addressing the complexity of a particular context. However, it is essential to recognize that every stage of development and the variety of ways that people express these, has critical contributions and unique perspective to offer society. For instance, understanding more nuanced complexity can add insight, but it can also get in the way of more practical and expedient action. Another example is the unique support that rule-oriented collectives can offer people in times of stress or breakdown. Every stage also has both strengths and “stage-specific vulnerabilities and new forms of unhealthy expression” (Cook-Greuter, 2013, p. 17). All stages of development are inherently valuable and worthy of respect and care. Additionally, the unfolding of developmental perspectives is not predictably evident along the lines of age, gender, nationality, or affluence.

Developmental research finds that there is stability to the stage of development that a person assesses at, which is called their ‘center of gravity’ by some practitioners and researchers. It can also take a number of years to move from one stage to another. However, research also shows that development isn’t fixed, meaning that different contexts evoke different expressions of the self, and that we are likely to move up and down the developmental spiral throughout any one day. For instance, how one behaves with their family of origin, their spouse, an esteemed colleague or a trusted friend can evoke different developmental capacities, as can being more relaxed or more stressed. Under stress, we often revert to developmentally earlier patterns of thought and strategies of behavior that reflect less complex ways of interpreting our reality (Torbert, 2004; Livesay, 2013). In addition, our development can also be uneven, in the sense that we can be more developed cognitively, than emotionally, or kinesthetically. In other words, developmental capacities and their expression through a unique person is a complex, and varied phenomena, and at the same time there are recognizable patterns to these expressions, that develop in relatively consistent ways.

## **STAGES Model**

The STAGES model is an adult developmental framework and assessment methodology developed by Terri O’Fallon. Built on the lineage of Loevinger and Cook-Greuter, STAGES identifies underlying repeating patterns (or parameters) in development and adds two additional later-level stages to current models. It “reveals a natural sequence of deep ‘vertical’ structures, as well as iterating, wave-like patterns of development” (O’Fallon, 2018). Loevinger’s 1976 ego development model was built on the work of Erik Erickson (1963) and was based on research using the Washington University Sentence Completion Test, one of the most widely utilized and



researched developmental assessments (Loevinger, 1976). Susanne Cook-Greuter then refined the sentence-completion test instrument as well as the level descriptions, adding the distinction of perspectives and two later level stages to Loevinger's work (Cook-Greuter, 2013).

Stages of human development are typically identified by interviewing or observing samples of people, recording their responses, and organizing these responses into categories. Researchers then sort these categories into a sequence of developmental stages. The STAGES model defines underlying patterns or parameters for describing developmental stages, rather than only using categories. The model and the research validating it, suggests that these patterns are fundamental attributes that lead to development in the first place.

STAGES defines three primary patterns that shift as people transit the stages. The first is on the objects of awareness. The question asked is "What kind of object is arising in awareness: a concrete object (family, car, work, rules, interior and exterior senses); a subtle object (metacognition, ideas, abstract theories, goals, contexts, systems, awareness); or a MetAware object (awareness of awareness, immanence, sea of manifestation)? Each of these: concrete, subtle, and MetAware – represent the three major tiers of development, each with 4 stages. The second pattern is the Individual/Collective polarity. The question asked is, "Is the emphasis on individuals (all about "me") or collectives (all about "we")? This pattern iterates twice in a tier. The third pattern refers to the four learning styles. The question is: Is the experience or meaning-making orientation receptive, active, reciprocal, or interpenetrative? With the third pattern, development unfolds through 4 learning styles in each tier: passive-individual (Receptive), active-individual (Active), passive-collective (Reciprocal), active-collective (Interpenetrative). These patterns and the associated stages of development are illustrated in Figure 1 (below).

These patterns define the three tiers, each with two major shifts in perspective-taking (1st person, 2nd person, etc.), and each of the person perspectives with one shift in the learning style (receptive, active, reciprocal, or interpenetrative), for a total of 12 stages across three tiers. The stages are numbered for their person perspective-taking capacities (1.0 and 1.5 referring to early and late first-person perspective, 2.0 and 2.5 referring to early and late second person perspective, etc.). The STAGES assessment has been statistically grounded (with a high level of reproducibility) to correlate with the SCTi-MAP, the most widely used and researched assessment tool of adult human development (O'Fallon, 2016).

In the first-person perspective, one is in a concrete 'I' stage. In the STAGES model, these are the receptive 1.0 Impulsive and active 1.5 Opportunist stages. In these stages, it is 'all about me' and there is no understanding yet of a 'We'. One can see others but does not have a truly unique identity separate from others, nor does one see others as unique in their own right. The focus is on one's concrete needs and wants.

The second person perspective stages foreground the concrete 'We'. These stages are the reciprocal 2.0 Rule-oriented and interpenetrative 2.5 Conformist stages. In the second person perspective, one sees that others see them and that, in order to satisfy their needs, they must work with others and make and follow rules together. In these 'We' stages, the 'I' is present and understood, but backgrounded, or deprioritized, in favor of relationships and groups.

| PP  | Question 1:<br>Is the object<br>of awareness<br><b>Concrete, Subtle,</b><br>or <b>MetAware?</b> | Question 2:<br>Is the experience<br><b>Individual</b> or<br><b>Collective?</b> | Question 3:<br>Is the experience<br><b>Receptive, Active,</b><br><b>Reciprocal,</b> or<br><b>Interpenetrative?</b> | STAGE NAME      |
|-----|---|--|--|-----------------|
|     | TIER  | SOCIAL<br>PREFERENCE   | LEARNING<br>STYLE  |                 |
| 1.0 | Concrete  | Individual   | Receptive  | Impulsive       |
| 1.5 | Concrete  | Individual   | Active   | Egocentric      |
| 2.0 | Concrete  | Collective   | Reciprocal   | Rule Oriented   |
| 2.5 | Concrete  | Collective   | Interpenetrative   | Conformist      |
| 3.0 | Subtle  | Individual   | Receptive  | Expert          |
| 3.5 | Subtle  | Individual   | Active   | Achiever        |
| 4.0 | Subtle  | Collective   | Reciprocal   | Pluralist       |
| 4.5 | Subtle  | Collective   | Interpenetrative   | Strategist      |
| 5.0 | MetAware  | Individual   | Receptive  | Construct Aware |
| 5.5 | MetAware  | Individual   | Active   | Transpersonal   |
| 6.0 | MetAware  | Collective   | Reciprocal   | Universal       |
| 6.5 | MetAware  | Collective   | Interpenetrative   | Illumined       |

**Figure 1.** The STAGES Matrix (O’Fallon & Barta, 2018).

Students in the 2.5 Conformist stage view the teacher as the ultimate authority. They expect and need highly structured learning environments to either conform to or rebel against. They want to know what the rules are. They are challenged to speak up individually in class except to get the answer to a question right. They struggle to think outside of the collective norms or to do group work. Individual feedback can be very threatening, and they are not likely to challenge the teacher directly. In following learning traditions, they value clear hierarchy. Status, appearance, material goods, reputation and prestige are also valued.

## Description of the Person Perspectives and Implications for Teaching and Learning

The next stage represents a shift from the concrete to the subtle tier. The third person perspective gives rise to subtle ‘I’ stages, where a person realizes they have a subtle self – the thoughts, emotions, and independent mind of rational consciousness. It includes the receptive 3.0 Expert and active 3.5 Achiever stages. This is an I-oriented space again, but the ‘we’ is present and backgrounded. The ‘We’ that is present, however, is the concrete collective; groups and their norms and rituals, since no new subtle ‘We’ has yet been discovered. The ‘I’ that is formed is a new, subtle self, not identified with the body and concrete appearances, but with the thinking and

feeling mind. This is a significant developmental shift and can be very disorienting in an individual's life and as a result takes time to stabilize. Although the shift into the subtle tier can occur in late high school or early college for some, others can live much of their adult life in this developmental stage, as is true of the late concrete stages and all of the subtle stages. Research suggests that a majority of adult in North America are between the 3.0 Expert and 3.5 Achiever stages. However, it appears that an increasing number of adults in Western European and North American contexts are moving into later subtle stages including 4.0 Pluralist.

Students at the 3.0 Expert stage of development tend to be black and white thinkers and are likely to dismiss feedback from anyone not considered to be an expert in their field. They are awash in new ideas of their own, independent from the groups they identify with but have a hard time prioritizing their ideas. This is a receptive stage, and so the individual is receptive to the newly arising subtle self or ego. They have a hard time reflecting on or thinking about their own thoughts and feelings, and may struggle with self-direction, time management, and completing assignments on time. This stage of development often emerges in late high school and early college students, although many adults in the Western world can live their whole lives in this stage of development. Authority and expertise are very important to this stage of development, as is an individual emphasis on figuring things out, and determining the 'right' and best way to do things.

3.5 Achiever students are actively goal-oriented, think in either/or terms, are more single-system, and results-oriented, and are establishing their skills and capacities as self-directed learners. Achiever learners accept feedback and will collaborate with others if it helps them to achieve a goal. They reflect on and evaluate theirs and others thinking to advance efficiency and value logical and objective processes to achieve results. They aren't yet aware of their own and others subjectivity, nor that working harder will not necessarily yield the expected outcomes. The developmental capacities of this stage include independent objective thought, self-direction with an internal locus of control, and a sense of agency with goals and a future plan. These reflect the conventional goals of college education in Western European countries:

Achiever is the target stage for much of Western culture. Our educational systems are geared towards producing adults with the mental capacity and emotional self-reliance of the Achiever stage, that is, rationally competent and independent adults. (Cook-Greuter, 2013, p. 40)

However, this expectation in higher education has more recently shifted to a post-conventional, post-modern or pluralistic expectation with the critical deconstructive perspectives of the next stage of development.

In the shift to the fourth person perspective, the subtle 'We' is foregrounded. The subtle collective consists of the perception of one being situated in and arising out of a plurality of contexts. This includes the receptive 4.0 Pluralist and active 4.5 Strategist stages. The 'We' isn't then a specific group, but it is a space of subtle ideas and systemic complexity. It consists not only of outer manifestations, such as the physical environment, the systems in which the context is embedded, the cultural context and form, but also inner manifestations, such as the attitudes, beliefs, assumptions, states of awareness, and ontological dispositions of the collective.

Students at 4.0 Pluralist are likely to be interested in their own authenticity separate from society's expectations, seek creative and unique approaches to their work, are aware of social contexts (their own and others), want to hear everyone's voices including faculty's, welcome feedback to discover their authentic selves, and may be strident about their pluralism and other socially critical ideologies. These students are both/and thinkers and recognize the subjectivity of objective perspectives.

Strategist 4.5 students tend to be more complex systemic and paradoxical thinkers and are aware of and passionate about their own and others' transformation and development. They are action-oriented, interested in taking multiple perspectives, may be impatient with excessive sharing and processing, and may be critical of a mentor or program that is in their own eyes, not transformative enough. They can step outside of systems and contexts and see how they have the capacity to shape contexts and systems, and thus are no longer subject to the experience of being created by contexts and systems. They also begin to see that the subtle things they see in others, are also within themselves. This capacity to recognize projection is the mature or later part of the Strategist stage.

The next stage involves a transition from the subtle, to the MetAware tier. This a big leap developmentally and can take time to stabilize in someone's life. At the fifth person perspective, individuals awaken to their ever-present awareness beyond the ordinary, subtle self, as the ground of their own being. This is awareness no longer identified with the concrete and subtle selves, or what we might conventionally refer to as the personal ego. Individuals in these stages begin to identify with this being as a new self, which is both empty and full, transcendent and immanent. In these stages including the receptive 5.0 Construct Aware and active 5.5 Transpersonal, the 'I' is foregrounded but the subtle 'We' remains as a context for this I. The 'I' is however not what we conventionally think of as 'I' – our concrete bodily self or our subtle thinking or narrative self, but rather our causal self, the limitless open horizon of awareness that we paradoxically seem to share with everyone and everything.

5.0 Construct Aware and 5.5 Transpersonal students are aware of the constructed and developmental nature of perspective taking, and they are flexible and adaptive in their communication and actions. Their thinking, which may be perceived as complex, includes both paradoxical and one-within-another ways of thinking. They may source their way of doing and being from a transpersonal experience of encountering a "vibrant and alive" world. These students may not feel seen or understood, and because of the relative rarity of these stages, it is less likely that there would be other students or faculty with similar developmental capacities (Cook-Greuter, 2013; O'Fallon, 2016).

At the sixth person perspective, this new 'I' is again backgrounded as it lets go into a much larger, MetAware 'We.' In the sixth level stages (6.0 Kosmic and 6.5 Illumined), the 'We' is all of concrete, subtle, and causal manifestation itself, the Kosmos, the utterly full and empty existence, eternal and beyond time, infinite and beyond space. Here individuals experience themselves as this whole, with their apparent (even causal) 'I' birthed by and birthing the whole. There is a keen interest at the sixth level in living as this larger collective, which has its own sense of 'We', and in allowing the intelligence of the whole, and that which births the whole, to express one's existence (Fitch, 2016; Lynam, Fitch, & O'Fallon, 2020).

In addition to learning more about the developmental patterns of students, educators are also actively constructing meaning of their experiences and viewing their identities as educators and their student's development through their own developmental lens. Developmental patterns around the identity of educators and their related practices and behaviors will be examined in greater depth in subsequent sections. However, it is important to remember that understanding development is also a subjective process, as we are always bringing our own meaning-making to the phenomena. You might pause in your reading and consider, how I am perceiving this material and how might my perceptions be shaped by my own developmental lens? The next section reviews literature on adult learning and adult development.

## Literature on Adult Learning and Adult Development

The research at the intersection between adult development and adult learning has predominantly made use of Kegan's subject-object developmental model, and to a lesser extent the ego development and action-logics frameworks (Cook-Greuter 1999, 2004; Kegan 1982, 1994; Torbert 2004, 2013). The research is focused in a few main areas: teacher development or preparation particularly for K-12 educators and school leaders (e.g., Garvey Berger, 2002; Hammerman, 2002; Hasegawa, 2004), and the application of a developmental lens to examine the impact on students' development or the learning outcomes in a particular learning context, or curriculum (Guilleaux, 2011; Harris, 2002; McCallum, 2008). I found only one study reported by Drago-Severson that examined the impact of learning about adult development itself (2012).

Levine (1980) used adult development theory to assess the personal and professional development of teachers in an elementary school. More recently, Helsing et al. (2008) argued for that a developmental perspective can improve professional development for educators. Sutton et al. (1996) used the constructive developmental framework of Belenky et al. (1997) to understand the epistemological beliefs of beginning teachers. They suggest that an understanding of adult development would likely improve such education.

Garvey Berger (2002) looked at the link between teacher belief and practice. She examined the way twelve novice teachers understood and believed they had enacted their experience of the Harvard Teacher Education Program (HTEP). Berger's findings suggest that teachers with different developmentally-related capacities vary in their abilities to withstand the socializing forces of their school contexts. Moreover, developmental capacity predicted transference of learning from the HTEP into their classrooms, as well as the likelihood of finding or creating communities of practice with their colleagues.

Hammerman (2002) researched how math teachers' meaning-making affected their ability to apply their learning from a professional development institute to their teaching. Hammerman described the epistemological demands made on experienced teachers by curricular and pedagogical innovations in mathematics education and found a strong link between the stage of development of the educator and how well they were able to integrate and work effectively with constructivist pedagogical reforms. Hammerman found that Kegan's self-authoring stage (3.5 Achiever to 4.0 Pluralist stage) was the minimum stage of development needed to effectively learn and ultimately practice the concepts of constructivist thinking implicit in the pedagogical reforms.

Drago-Severson (2004a) investigated how development influences what principals need to sustain their learning from professional development and to support the development of educators in their schools. She examined how a particular head of school “exercised her leadership on behalf of promoting adult growth. How does this head understand and experience her role? What are the attitudes, beliefs, and values that appear to govern her actions? How are her ideas translated into action?” (2004a, p. 80). Drago-Severson’s study reinforced the usefulness of adult development theory as a research tool.

Guilleaux (2011) also studied the development of principals. He found that introducing adult development theory as a frame for leadership development supported students’ learning. It gave them a language to assess themselves, articulate their learning, and determine their learning goals for becoming principals.

Hasagewa (2004) examined the way teachers’ developmental stages affected the way they experienced the shift into a teacher leader role. She found that the more mature the complexity of meaning-making was, the easier it was for the teacher to shift into taking more leadership responsibilities.

In addition to teacher and school leadership development, adult development theory has also been used to examine adult and post-secondary student experiences of curriculum and how development influences learning needs and outcomes. A number of recent studies (Harris, 2002; McCallum, 2008; Nicolaidis, 2008) all point to meaning-making as a significant influence on what and how students learn, and the developmental supports they might need for their learning to be more effective, successful, or transformative.

Harris (2002) found that students at earlier stages of development were less likely to experience transformative learning than those at later stages. She made the point that transformation can happen at all levels of development; however, course design might preference transformation at a particular level (4.0 Pluralist) and often the later stages (4.0 Pluralist /4.5 Strategist). She also found that a student’s developmental stage influenced the nature of the support they required and their use of particular learning strategies.

McCallum (2008) explored the relationship between participants’ stages of adult development and their learning experience in a Group Relations Conference. His research found that the participants’ stages of development account in part, for their capacities to learn from their experiences in this particular learning context. He also found that participants’ developmental maturity affected how quickly they were able to recover from behavioral regression brought on by the complexity and conflict they experienced in the learning process.

Nicolaidis (2008) looked at the relationship between adult development and how someone experiences and describes ambiguity or uncertainty. She found distinct forms of meaning-making in the participants’ relationships with ambiguity. The Pluralist inquired into ambiguity, the Strategist learned their way through ambiguity, and the Construct Aware surrendered to ambiguity. Finally, the Ironist (an ego development stage which includes Transpersonal) generated ambiguity in order to discover the creative potential that it promises.

The research on adult development and adult and transformative learning demonstrates the significant implications of understanding developmental differences in meaning-making, and the corresponding learning support and challenges needed at different developmental stages. The following section reports on developmental research including data on the developmental diversity of students and faculty in higher education, as well as research on the impact of introducing faculty and students in graduate education to a developmental perspective.

## **Developmental Research in Higher Education**

Three different areas of research are reported on in this section. The first is aggregate data from stage assessments in different higher education contexts. The second reports on developmental patterns in meaning making about education and the identity of educators. The third shares the findings from doctoral research that sought to understand more about how development shapes teaching, mentorship, and learning needs, and how learning about one's own and faculty/student development in graduate education impacted the educators and the students developmentally, personally, and professionally.

### **Developmental Data on Faculty and Students**

Although limited in sample size, research on ego development suggests that the developmental range of undergraduates is generally 2.5 Conformist through 4.0 Pluralist. Research conducted on two cohorts of students in an upper division (junior and seniors) undergraduate program in sustainability (n=20) found that the developmental range was from 3.0 Expert through 4.0 Pluralist, with the majority of students assessing at 3.5 Achiever and with a lesser number of 4.0 Pluralist and 3.0 Expert on either side of the majority (Lynam & O'Fallon, 2017). Other data sets in undergraduate education find a similar distribution with the majority assessing at 3.5 Achiever. See table 2 below.

Research conducted in PhD programs (n=40) found a developmental range from 3.5 Achiever through 5.5 Transpersonal, with the majority of students falling at 4.5 Strategist (Lynam, 2018). The majority of this sample is self-selected and therefore is likely to be later developmentally than if more students were included. Research with PhD faculty (n=10) found a range from 3.5 to 5.5 with a majority at 4.0 Pluralist (Lynam, 2014).

This data is significant in a number of ways. One is that the learning needs and learning styles of students is significantly different at these different stages of development. Based on the data and my observations of students, it is common to have a span of at least three developmental stages within a cohort or community of learners. The perspective-taking capacities, meaning making, and learning needs of students differ significantly across the stages. This presents opportunities and challenges for designing curriculum, assessments, and adapting teaching styles to address the developmental diversity.

The meaning that students make of their learning and the topic of study will be significantly different across developmental stages. Understanding these distinctions can help educators adapt curriculum and scaffold the learning. For instance, recognizing that development shapes one's capacities for critical reflection and systems thinking can help educators adapt accordingly.

Finally, the data shows that the developmental span of students in graduate education can be wider than the developmental span of faculty, meaning that some students are developmentally later than their faculty. This presents some unique challenges which will be addressed later in the article. The following section presents findings on how meaning-making and the identity of educators is different for each of the developmental stages.

**Table 2.** Comparison of percentage stage distribution in 6 different samples (Cook-Greuter, 2013; O’Fallon, 2018; Lynam, 2018; Thomas, 2018).

|                    | 535<br>Leaders,<br>UK, pre<br>2000<br>Torbert &<br>Cook-<br>Greuter | 497<br>Leaders<br>USA, pre<br>2000<br>Torbert &<br>Cook-<br>Greuter | 4510<br>Mixed<br>adult<br>population,<br>USA, 1999<br>Cook-<br>Greuter | 20<br>Upper-division<br>Undergraduate<br>students, 2018<br>Lynam | 40<br>Graduate<br>students<br>(self-<br>selected),<br>2018,<br>Lynam | 55<br>Undergrad<br>uates, State<br>University,<br>2018,<br>Thomas |
|--------------------|---|---|--|--|--|---|
| Conformist         | 1.7   | 8.2   | 4.3  |  |  | 4   |
| Expert             | 21.1  | 47.8  | 11.3   | 4  |  | 9   |
| Achiever           | 33.5  | 34.8  | 36.5   | 11   | 6  | 33  |
| Pluralist          | 23.4  | 5.0   | 11.3   | 5  | 5  | 7   |
| Strategist         | 13.5  | 1.4   | 4.9  |  | 18   | 1   |
| Construct<br>Aware | 5.6   | <1  | 1.5  |  | 5  | 1   |
| Transpersonal      | .09   | <1  | .05  |  | 4  |   |
| Universal          |   |   |  |  |  |   |

### Research on Meaning Making about Education and the Identity of Educators

Based on the responses of educators who took a STAGES developmental assessment focused on education, it is striking to notice the developmental differences in meaning making around education and the identity of educators. Table 3 presents direct quotes of how individuals responded to sentence stems about education and what they consider to be a good educator.

**Table 3.** Select responses to the sentence stems: Education... and A good educator... (O’Fallon & Lynam, 2018).

| Developmental Stage | Meaning Making about Education   |
|---------------------|--|
| 2.5 Conformist      | <b>Education...</b> to maintain the past and respect tradition, by being good, disciplined and following the rules you have a guaranteed place in society. |



|                     |  |
|---------------------|--|
| 3.0 Expert          | <p><b>Education...</b>to assure the future. Become an expert on something so that you can be of service to society and build useful things.</p> <p><b>Education...</b>is very important to me and is the key to success.</p>   |
| 3.5 Achiever        | <p><b>Education...</b>is the lifeblood of society, as we learn we grow and enhance our ability to achieve our dreams and desires.</p> <p><b>Education...</b> is the key to propelling our society forward.</p> <p><b>Education...</b> is incredible! I have a constant thirst to keep learning new things. I'm finally learning to view success in terms of my own self-developed goals, rather than what the teacher thinks about me or what the grade says.</p> <p><b>A good educator...</b>(1)understands his/her students and their needs; (2) values and respects every student in the classroom; (3) delivers information at a level that the student can absorb; (4) is deeply knowledgeable in the subject he/she teaches</p>  |
| 4.0 Pluralist       | <p><b>Education...</b>is intrinsically satisfying. For me, true education is less about facts (though valuable) and more about discovering the great principles of what life is about.</p> <p><b>Education...</b> enables freedom and choice in our modern society; but there are many disadvantaged groups that do not have access to education; it seems important that education be available for everyone.</p> <p><b>Education...</b>, the system I work within, is being reimagined and transformed as a learner-centered and dialogical process.</p> <p><b>A good educator...</b>is a good listener, adaptive, curious, experienced, humble, well-read, forward and past thinking, able to consider different possibilities, and willing and able to connect with students where they are intellectually and developmentally.</p>  |
| 4.5 Strategist      | <p><b>Education...</b> Is vital, the more people are aware of what is happening in the world, how our actions impact others, the environment, etc., the more likely we can continue to expand the understanding that we are all interconnected and our life is dependent on how we treat the Earth and its inhabitants.</p> <p><b>Education...</b> is a critical aspect of our development (in all its forms, institutional campuses and from "life") and only really ends when you've made the grave mistake of assuming you "understand it all".</p> <p><b>A good educator...</b>offers students developmentally appropriate challenges, support to meet those challenges, and a container in which to explore their developing capacities; is fundamentally changed by the act of teaching.</p> <p><b>A good educator...</b>joins self, subject, and students in the fabric of life because they teach from an integral and undivided self; they manifest in their own lives and evoke in their students, a "capacity for connectedness."</p> |
| 5.0 Construct Aware | <p><b>Education...</b>comes divinely with every moment -- be it emotional, conceptual, spiritual, extraterrestrial.... I want to receive with the humor and grace that open me beyond my current understanding.</p> <p><b>Education...</b>is every moment when we are awake to this Life; we're only not learning when we're lost in our self-repeating loop of the thoughts we've thought a million times before.</p> <p><b>A good educator...</b>exists on a myriad of levels, each educator has a particularity that by the very fact of itself communicates something that is received every second of our lives; the most "effective" educators see this</p>  |

about themselves, his or her particularity, and embraces it with love and, in turn, the particularities of each student, and some educators see themselves as beyond the boundary of good/bad/effective/ineffective--that there is something beyond any conceivable curriculum that is happening here.

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In the examples of responses of educators to the sentence stems there is a developmental progression from seeing education as a way to maintain the past (2.5 Conformist), to assuring the future and a key to success (3.0 Expert), to a way to achieve goals that are internally referenced (3.5 Achiever) and to teach in a way that delivers information and recognizes the value of each student. At 4.0 Pluralist education becomes more about freedom, authenticity, and is learner centered, and at 4.5 Strategist education starts to take into consideration the interconnection of multiple system including the Earth and its inhabitants, and is developmentally responsive, creating containers for development. At 5.0 Construct Aware the meaning of education shifts yet again to move beyond the bounds of what it typically considered education to include moment to moment experience and being awake to life. Evident in this developmental progression is the widening of circles of identity, responsibility, and care, all of which translates into different approaches to the process of teaching and learning.

## **Research on the Impact of Learning about Development**

Doctoral research I conducted in 2014 sought to understand how development shapes teaching, mentorship, and learning needs, and how learning about one's own and faculty/student development in graduate education impacted the educators and the students. It explored a number of questions including: How does learning about development, one's own and others', impact students and faculty in higher education, developmentally, personally, and professionally? How does development shape teaching, mentoring, and learning needs? How might learning about development effect student's relationships with faculty and vice versa? What happens when the developmental range of students is wider than the faculty's? The research addressed gaps in the literature of adult and transformative learning, concerning the role that ego development (Cook-Greuter, 2013; Torbert, 2013; O'Fallon, 2016) plays in perspectives and practices around teaching, mentorship, and curriculum design. The research examined the impacts of introducing ego development to faculty and students in a post-secondary program in sustainability education and leadership development. It also examined the relationships between stage development and student's experience of the curriculum, teaching, and mentoring.

The site of study was a Ph.D. program in Sustainability Education, and the participants included four faculty and seven students. The study was mixed-methods and included pre and post semi-structured interviews; a five-month action inquiry process involving reading, reflective writing, and group discussion; and a pre and post developmental assessment and debrief through the use of the SCTi-MAP and STAGES assessment (Lynam, 2014).

## **Findings**

Within the sample of students, there was a developmental diversity that ranged from 3.5 Achiever through 5.5 Transpersonal. The faculty's development ranged from 3.5 Achiever through 4.5 Strategist. Each developmental stage has unique capacities, strengths, challenges,

and needs as learners/educators. Additionally, whether an individual is newly emerging into a stage or exiting their present stage of development, also informs the kind of mentoring that is likely to better support them.

The findings demonstrated that learning about adult development was transformative developmentally, personally, and professionally for both students and faculty. The research suggested that integrating a developmental awareness into post-secondary education may support transformative learning and growth across the developmental diversity in a community of learners. It may also support the development of the educators themselves and their skill development for working well with diverse groups of learners.

## **Learning about Adult Development**

To support learning about development, the participants took a developmental assessment, received an hour-long developmental debrief, participated in a 5-month action inquiry process including a workshop about adult development, readings, reflections, and dialogue with other participants in their constituent groups (students or faculty). Regarding the developmental impact of the study, six of the eleven participants assessed at a later developmental stage in their second assessment, two participants' assessments showed more than one full stage of developmental growth, and two participants assessed at half to one stage earlier developmentally. Regarding the personal impacts, all participants described some positive impact (eight out of the eleven describe significant impact) in their personal lives including greater self-awareness and self-knowledge; increased compassion, understanding, and acceptance of differences with others; communicating in ways that are developmentally responsive and aware; and more careful listening. In their professional lives, all participants described positive impact, and seven out of eleven described significant professional impact. These included that learning about development influenced their research design and analysis, mentorship, communication, teaching, and curriculum design.

## **Developmental Awareness and Transformative Impact**

There were significant developmental differences in how students described their learning and transformation in the program and how faculty talked about their approaches to teaching and mentoring. The findings suggest that applying a developmental perspective to the teaching, mentorship, and curriculum design in a post-secondary program may deepen the transformative impact.

The student participants assessed at 3.5 Achiever and 4.0 Pluralist described the program as significantly transformative; however, the 3.5 Achiever participant spoke of challenges in maintaining some of the learning with increasing distance from the program. Participants assessed at 4.5 Strategist did not describe as much transformation and were critical of aspects of the program and the mentoring they received. 5.0 Construct Aware and 5.5 Transpersonal students spoke of transformation, but only partially as a result of the teaching, mentorship, or program design. The students also shared that thinking about their faculty developmentally supported more reciprocal relationships and helped them to understand their experiences with faculty in new ways.

In addition, faculties' developmental stages were shown to influence how they teach, mentor, orient to the program's focus on sustainability, and design learning experiences. Faculty assessed at 3.5 Achiever and 4.0 Pluralist were more likely to promote a particular worldview or values development and may be less likely to understand or effectively meet their students' developmental needs. 4.5 Strategist faculty have greater capacities to understand and perceive their students' development and therefore are more likely to mentor in developmentally responsive ways. Learning about the developmental range of the students was eye opening for faculty. It helped them to consider how to meet the students' developmental needs, and to grapple with the disorienting dilemma of working with students who are later developmentally than the faculty. Interestingly, I observed that the faculty often had an intuitive sense of which students might be later developmentally, as they had recognized in these students an increased capacity to engage with complexity. Learning about development helped them to make sense of this intuitive recognition in a way that added insight and understanding for how to work more effectively with these students (Lynam, 2014).

## Teaching and Learning Developmentally

Developmentally aware and informed teaching and mentorship works in multiple directions at once. Understanding how adults develop supports educators to design curriculum and mentor in ways that meet students where they are developmentally and support their next steps. It illustrates and values the diverse ways in which students make meaning, and their perspectives and practices with regard to the content or focus of learning. It can also inform the self-awareness and development of the educators and leaders themselves, as well as inform ways of working more effectively with the developmental diversity within a learning community (Cook-Greuter, 2013; Drago-Severson, 2004; Kegan, 1982; Torbert, 2013; O'Fallon, 2010, 2016).

According to O'Fallon, without an understanding of their own development, educators may be more likely to project their own developmental needs onto students, teaching 'who they are', rather than who is in front of them. This can include teaching for a particular developmental transformation which would only be appropriate for a some of the students. Understanding the developmental process also supports educators to engage in their own development, once they have a sense of where they are and what might be next in their developmental unfolding (O'Fallon, 2010).

The research demonstrated that there are significant developmental dimensions to teaching, mentoring, and learning. Students have different needs developmentally. By learning how to identify and meet these distinct needs, educators can more effectively support student success. Developmentally aware mentoring can also support the development of faculty. In turn, this suggests the importance of engaging in developmentally informed professional development that encourages listening for and integrating student's psychological development in program design, mentoring, and curriculum.

## Practical and Research-based Insights for Developmentally Informed Teaching

A first step is recognizing that adults develop through stages of meaning-making and perspective taking in ways that are relatively consistent and reliable. This is relevant for understanding the developmental diversity that is likely to be present in a community of learners, for recognizing the developmental needs of particular students, and how to design learning experiences to address the varying development needs.

Identifying a student's stage of development can predict that which they can comprehend, attend to, and accept responsibility for, and that which they are likely to find interesting, worthy of exploration, and learning. Identifying a stage of development can also predict the type of "holding environment" that will facilitate further learning and development. This can include the setting, the types of relationships, and the set of support services and systems that will provide a secure foundation for further exploration (Kegan cited in Boyer, 2005, p. 782).

Understanding developmental patterns is also helpful in considering one's own development as an educator and how this might shape teaching styles and habits.

### Perspective-Taking and Thinking Patterns

As was reviewed earlier, perspective-taking is a central pattern of the developmental process. Kegan examines the subject-object move at the center of constructive development theory; that when someone is subject to something, it has them rather than them having it. In other words, they are not able to see whatever the "it" is (for example one's beliefs or internalized sense of privilege) and therefore cannot yet work consciously with it or change it. However, once we see our own beliefs or values for instance, we can reflect on them and even change them. With ego development and the STAGES model, perspective-taking capacity expands throughout the stages from first through sixth person perspectives and beyond. Perspective-taking shapes thinking patterns and thereby the teaching and learning process.

In review, in the STAGES model there are three tiers of development, concrete, subtle, and MetAware, where the objects of awareness change from concrete objects (what you can perceive with your interior and exterior senses, and simple emotions, rules, etc.), to subtle objects (metacognition, ideas, abstract theories, goals, feelings, contexts, systems, etc.), to MetAware objects (awareness of awareness). Within each tier there are 2 person perspectives, for instance 1<sup>st</sup> and 2<sup>nd</sup> person for the concrete tier, 3<sup>rd</sup> and 4<sup>th</sup> person perspective for the subtle tier. Each person perspective has two stages, an entry level stage such as 3.0 Expert and a late exit level stage such as 3.5 Achiever for third person perspective. And finally, each of the 4 stages within a tier represents a learning style which are receptive, active, reciprocal, and interpenetrative or integrative.

To explore the relevance of these patterns to education, we will examine the developmental shift between the 2<sup>nd</sup>, 3<sup>rd</sup>, and 4<sup>th</sup> person perspectives. Individuals at the 2<sup>nd</sup> person perspective recognize that there are other human beings with feelings and thoughts of their own. They see that they have a separate self (concretely) and that others can see them. In order to satisfy their

needs, they recognize that they must work with others to make and follow rules together. With the development of the 3<sup>rd</sup> person perspective, a subtle self arises which means the individual begins to perceive a world of subtle objects such as thoughts and feelings, plans, and abstract ideas. At the early part of the 3<sup>rd</sup> person perspective, 3.0 Expert, the individual can ‘see’ the collectives that they are a part of, but they are receptive or subject to their own thinking. In other words, thinking about thinking, evaluating thinking, or thinking reflectively is rudimentary at this stage. It isn’t until the late 3<sup>rd</sup> person perspective of 3.5 Achiever that an ability to observe one’s thoughts and think reflectively becomes more fully developed. When someone is subject or receptive to their subtle thoughts and feelings, their thinking is one-sided. At the 3.5 Achiever stage the individual is able to consider their views in light of others but is still inclined to pick the view they prefer, in what is often called either/or thinking.

An example of the difference between either/or and both/and thinking was demonstrated by a class of freshman and sophomores learning about globalization. The students were learning about the concept of global citizenship. I asked them to consider the value and importance of global citizenship in today’s increasingly global world. Many of the students said that they couldn’t be global citizens because that would cancel out or threaten/undermine their national citizenship. They were perceiving the issue through either a one-sided or either/or frame of thinking.

After much discussion, one student in the class had an ‘aha’ moment where he recognized that he could be both a global citizen and a national citizen and that each could potentially complement or be used in service of the other. It appeared that his (and some of his classmates who agreed) thinking had shifted from seeing the two as opposing or contradictory, to both/and complementary.

Reflective and critical thinking is a goal of undergraduate education; however, it is particularly challenging for students at the 3.0 Expert stage of development common among early undergraduates. Students operating from this stage of development may be prolific at generating new ideas but will have a hard time reflecting on and evaluating their own thinking, nor see the purpose of doing so. Critical reflection becomes easier at the 3.5 Achiever stage of development, especially if it is clearly tied to goals and outcomes. Self-reflection can be a developmental overstretch for 3.0 Expert students, but a developmentally appropriate stretch for 3.5 Achiever students.

Another common goal of postmodern higher education is social deconstruction and critique. This capacity isn’t naturally available until the context-aware capacities of a 4<sup>th</sup> person perspective. It is at 4.0 Pluralist that individuals recognize the subjectivity of thinking and how thoughts are shaped by internal and external contexts such as family, culture, gender, and other intersecting identities. At this stage, which is also a collective stage with a reciprocal learning style, 4.0 Pluralist thinking becomes both/and. Individuals here see that thoughts are shaped by contexts, and that we can understand (and deconstruct) a particular view or value by understanding the systems that shaped it.

Reflective thinking, systems thinking, and the ability to recognize subjectivity are all developmental capacities. Recognizing this helps educators develop and scaffold learning

activities to support the progression of these capacities in a group of developmentally diverse learners. Conversely, expecting outcomes that are beyond a student's developmental capacity puts them in over their heads and might be experienced as an over-stretch. It is important to understand the developmental supports that different students might need and integrate these into the design of curriculum. It is equally important to be attentive to the epistemological demands and assumptions that classes make on students and to recognize that if a student cannot engage successfully in an activity, it might be because it is beyond the capacities of their current way of making meaning (Cook-Greuter, 2006; Drago-Severson, 2004a, 2004b; Kegan 1982, 1994; O'Fallon, 2016).

Perspective taking and the related thinking patterns are illustrated in Table 4.

**Table 4.** Patterns of Thinking (Cook-Greuter, 2004; O'Fallon, 2016).

| Developmental Stage | Perspective-Taking and Polarity Patterns   |
|---------------------|--|
| 2.5 Conformist      | Late 2 <sup>nd</sup> person perspective: In relationship with another. "See others seeing them" concretely. Concerned about socially expected behavior, approval, avoids conflict, loyalty to chosen group. Wants to belong. One right way thinking. Can't question group norms. Uses hierarchical thinking to distinguish between levels of morality and appropriateness (good better best)   |
| 3.0 Expert          | Early 3 <sup>rd</sup> person perspective: Stands back and observes two others interacting and 'objectively sees what is happening' on a subtle interior level. Beginning recognition of one's own ideas separate from social groups. Interested in expertise, procedure, and efficiency; what's logical. Has a hard time prioritizing ideas because they are all good. Black or White thinking; knows the answer and only sees one side of an argument. Tends towards perfectionism. |
| 3.5 Achiever        | Late 3 <sup>rd</sup> person perspective: Interested in rational scientific analysis, success within a system, thinking about thinking. Prioritizes ideas for effectiveness and goal-oriented results. Either/or thinking. Tends to talk at, rather than with. Critical reflective thinking is useful to for being more effective completing tasks and achieving goals.   |
| 4.0 Pluralist       | Early 4 <sup>th</sup> person perspective: Stands back and sees that the observer is situated in a social context, and therefore subjective. Can see others seeing them on a subtle level: Reciprocal. Knows others can see things in them that they can't see in themselves and has the courage to delve into what others may see, even if they don't like what they hear. Has a hard time prioritizing contexts – relativism. Both/and, it depends thinking. Metacognition.         |
| 4.5 Strategist      | Late 4 <sup>th</sup> person perspective: Understands and prioritizes interior and exterior contexts, sees developmental unfolding, shapes contexts to support development of self and others. Works with dynamic systems and paradox, linking theory and practice. Sees that what they judge in others is held within themselves – Interpenetrative, one within the other, paradoxical thinking.   |

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|                     |  |
|---------------------|--|
| 5.0 Construct Aware | Early 5 <sup>th</sup> person perspective: Stands back and see the previous pattern of observing observers observing, awareness of the constructs we hold, the complexity of meaning-making, witnesses the emptiness of words and illusion of meaning. Has a hard time prioritizing constructs. |
|---------------------|--|

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Another example of developmental progression that is relevant for curriculum design is how feedback is perceived through the stages of development. As can be seen in Table 5, in the earlier stages (Expert, 3.0 and earlier), feedback can be experienced as threatening and may only be accepted from those considered to be an authority in the community or field of study. Student-to-student and collective feedback and assessment processes can be threatening and not very effective at the 2.5 Conformist and 3.0 Expert stages of development.

**Table 5.** Stages and Patterns in Relation to Receiving Feedback (Cook-Greuter, 2004; O’Fallon, 2016).

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| <b>Developmental Stage</b> | <b>Feedback</b>   |
|----------------------------|---|
| 2.5 Conformist             | Receive feedback as disapproval, or as a reminder of norms. Deflect feedback that threatens loss of face. Unable to give feedback to others. Cannot question group norms. |
| 3.0 Expert                 | May take it personally, defend own position; dismiss feedback from those who are not seen as experts in the same field  |
| 3.5 Achiever               | Accept feedback especially if it helps them to achieve their goals and to improve   |
| 4.0 Pluralist              | Welcome feedback as necessary for self-knowledge and to uncover hidden aspects of their own behavior, to discover their authentic self                                    |
| 4.5 Strategist             | Invite feedback for self-actualization; conflict seen as an inevitable aspect of viable and multiple relationships  |
| 5.0 Construct Aware        | View feedback (loops) as a natural part of living systems; essential for learning and change; and take it with a grain of salt.   |

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## Learning and Teaching Styles

In the STAGES model, each tier of development has four learning styles, one for each of the stages in the tier. These also translate into teaching styles and habits. In the subtle tier, most relevant to higher education, the first stage 3.0 Expert is a receptive stage, where the individual is receptive to the subtle self or ego, the realm of ideas, thoughts, feelings, abstractions, and plans. As the individual gets to know the contours of this new dimension of self, they are receptive to



these new capacities, and not yet able to direct and focus them. An example of this is students that produce large volumes of work, but have a hard time reflecting on the work, or prioritizing their ideas and deciding which might be relevant to the intended outcomes. Also, there are perfectionistic tendencies at 3.0 Expert, and so students can have a hard time completing something or deciding that it is good enough.

At the next stage of 3.5 Achiever, they learn to be active with subtle ideas, thoughts, and feelings, resulting in prioritization and focus for more effective outcomes. However, both the 3.0 Expert and 3.5 Achiever are individually oriented stages, not yet reciprocal with these capacities, and therefore they tend to engage in one way talking, or to talk at someone rather than with.

In terms of teaching styles, someone at the 3.0 Expert stage values expertise and highly refined knowledge in their area of expertise. Teaching is likely to be in the form of direct information delivery without much interaction, a traditional ‘sage on the stage’ approach. At the Achiever stage, it is still generally a one-way approach with an emphasis on best practices, outcome-based learning, and assessments. However, there is a greater likelihood to include some active and applied project-based learning and sometimes self-directed and self-paced learning (Lynam & O’Fallon, 2017).

4.0 Pluralist is a collective-oriented stage that is reciprocal with their subtle capacities and awareness, and so teaching becomes learning, with more of a ‘guide on the side’ mentoring approach. There is a shift towards collaborative and non-hierarchical learning environments, which are often student-centered and dialogical. The shift towards student-centered learning environments can lead to faculty (especially in higher education) backgrounding their own expertise and direct teaching, so much so that it can potentially hamper or limit students’ learning. This can also come as a request from the students, particularly in graduate school, that want to be reciprocal and more like peers with faculty.

4.5 Strategist is an integrative, one within the other approach, that integrates outcome and process, teacher and student, self-direction and teacher-direction. At the Strategist stage, there is an inherent recognition of the developmental process and an interest in identifying principles of transformative learning and creating contexts or containers for development (Lynam & O’Fallon, 2017; O’Fallon & Barta, 2018).

Recognizing these learning/teaching style tendencies, educators can attend to including all 4 of the learning styles in their curriculum, as well as noticing what their own tendencies are and adjusting for any imbalances. Just as noticing the developmental patterns of students can support compassion, understanding, and effectiveness, noticing the same with teaching colleagues can also support an increased understanding and ease of working together. There are often ideological conflicts between these different teaching approaches (outcome based versus process-oriented, teacher centered versus student centered, individual rather than collaborative learning, etc.), and understanding how development contributes to these differences can help reduce tension, and potentially increase collaboration or recognition of the relative merits and limitations of each (Lynam & O’Fallon, 2017; O’Fallon 2016).

| Structure Pattern | Receptive<br>New Identity                   | Active<br>Identity fixes<br>(Sees old ego)                 | Reciprocal<br>Identity/groups<br>(Ego collectivizes)    | Interpenetrative<br>Identity<br>Authenticated<br>(Ego loosens) |
|-------------------|---|--|---|--|
|                   | One way seeing<br>Unstable<br>Sees one side | One way seeing<br>Parallel play<br>Agree to disagree       | I see you see me<br>Reciprocal relativism               | I see you are me<br>Integrated                                 |
|                   | Horizontal<br>Individual cause & effect     | Hierarchical<br>Individual cause & effect<br>Universalizes | Horizontal<br>Collective cause & effect/<br>fundamental | Hierarchical<br>Collective cause & effect/<br>fundamental      |
|                   | Fuzzy                                       | Focused  | Aware   | Aware & Focused  |
|                   | Early <b>Individual</b> STAGE               | Late <b>Individual</b> STAGE                               | Early <b>Collective</b> STAGE                           | Late <b>Collective</b> STAGE                                   |

Figure 2. Learning Styles (O’Fallon & Barta, 2018).

## Developmental Teaching Principles and Practices

The first principle is recognizing that there is developmental diversity in a community of learners, and as was mentioned previously, there is often a span of 2 or 3 developmental stages. Understanding the likely developmental span can make a big difference for designing learning experiences. One thing that can help is to pay attention to the developmental outliers in a group, on either end of the developmental diversity of the group. Those earlier developmentally may need additional support and those on the later end may need more challenges – support in a different form.

It also helps to listen for different thinking patterns and help to translate student’s comments so that they are more likely to hear each other and to help integrate the different perspectives into a larger whole. If there is a student struggling with a learning exercise, or you find them hard to understand, it can be helpful to consider where they might be developmentally and how the learning or instruction can be adapted to meet their developmental needs. For instance, in a group of graduate students...

The second principle is to consider whether a student is entering a new stage, needing to stabilize new capacities, or ready to exit a stage and needs help reaching for what is next. When someone is ready to move into the next stage, they often reject or push against where they just came from developmentally and can be frustrated by or judgmental of others’ views from the previous developmental stage. It is also important to provide additional support when students are shifting from one tier to another, such as the shift from 2.5 Conformist to 3.0 Expert, or the shift from 4.5 Strategist to 5.0 Construct Aware. These are big shifts that can be very disorienting and take time to stabilize in people’s lives.

The shift from an early part of a person perspective to the late part, such as from 4.0 to 4.5, is much easier than the shift into a new person perspective. Berger (2004) recommended three important steps to effective developmental teaching: “helping students recognize the edge of

their meaning-making; being good company at the edge; and helping to build a firm ground in a new place” (p. 346).

A third principle is for educators to pay attention to their own development and how it might shape teaching styles, as well as one’s view of students. To support this, educators can take a developmental assessment to learn more about their own development. Educators can also inquire into how development shapes teaching styles. Are they teaching to their own developmental edges, rather than the students? Do they tend to teach who they are, rather than who is in front of them? In the STAGES model, there are iterative patterns between the tiers, and so for instance 3.0 Expert has some similar patterns to 5.0 Construct Aware, as does 3.5 Achiever, with 5.5 Transpersonal. The similarities can make teaching others in the same stage in the prior tier easier. Conversely teaching students one stage prior to where you are developmentally, or one stage earlier in the prior tier, can be challenging. This is because of the tendency to push away from the previous stage in an effort to differentiate, as was mentioned previously. It is important to notice these challenges and work to correct for them.

A fourth principle is to work with developmental shadows (unintegrated parts of the self) and the blind spots of each stage. Challenging or even traumatic events in one’s own life, can make one susceptible to triggers and shadow with students at the same stages. Doing shadow work on these areas can have a tremendous impact in teaching and support educator’s development as well. In addition to working with a therapist, counsellor, or developmentally informed coach, educators can start to notice what they struggle with. They can identify some of their trigger points or sensitivities with students or colleagues, and then reflect on how they might also have these tendencies or behaviors in themselves. They can also consider where these triggers or sensitivities might have come from in their childhood. When an educator has a strong judgement of a student they can ask, how is this quality also in them? Or whether they allow themselves to express something a student is expressing, and therefore find themselves struggling to tolerate it?

In addition to an educator’s own unconscious and unhealed shadow, each of the developmental stages has both gifts and blind spots. By recognizing some of the limitations of each stage, we can work to minimize the impact these might have on students. For example, 3.0 Expert can emphasize one right way thinking, while 3.5 Achiever can pursue goals and outcomes in ways that can overstretch others or create unachievable expectations. Individuals at 4.0 Pluralist can promote values of inclusion that exclude those that don’t yet hold those values and 4.5 Strategist can create formidable expectations for development in their passion to transform others.

A fifth principle calls for developmental humility and practicing developmental ethics. Developmental ethics preclude not preferencing or idealizing later stages. Teaching is not aimed at driving development, so much as aiming to meet someone where they are developmentally and support them on their growing edges. Developmental growth does not necessarily imply goodness, efficacy, balance, or health. Ethical practice also calls for continued personal development work to uncover blind spots or shadow that may express hidden agendas in practice.

Finally, the sixth and perhaps most important principle of all is to approach teaching and mentoring with the reverence it deserves. Developing unconditional regard for students (and fellow educators) is likely to have a greater impact on the teaching/learning and thereby developmental process, than any other practice or stance. Teaching developmentally is paradoxical in that by understanding where someone is developmentally, means not putting them in a box or ranking them in a hierarchy of values. Rather, it means having profound respect for another's life journey, including their inherent dignity and value while endeavoring to offer a balance of support and challenge for who they are becoming. Held this way, adult development research and practice can truly act as a spectrum of compassion, supporting the liberation of self and others through the teaching, learning, and mentoring process.

## Conclusion

As our world experiences social polarization and ecological breakdown, developmentally informed teaching can support increased capacities for perspective-taking, bridging differences, and increased awareness of implicit bias and blind spots. It also has the potential to catalyze widening of circles of identity, responsibility, and action in the world by evocatively supporting development rather than pressuring growth. It can help educators embrace their students, themselves, and their colleagues with developmental understanding and compassion, and create conditions for further development.

In the research exploring the impact of learning about adult development, educators described greater self-understanding and self-acceptance, increased understanding of others, improved communication and relationship dynamics, and a deeper understanding of working with differences. They also described that learning about development influenced how they approach mentoring, teaching, and supervising, curriculum and project design, their understanding of different cultural and professional contexts (Lynam, 2014).

More research is needed to further understand how to teach developmentally, what the impact of developmentally informed teaching is, how taking developmental assessments impacts teachers and students, etc. However, initial research and anecdotes from educators indicate the powerful potential of teaching and mentoring in these ways. A faculty member in higher education describes the impact of learning about adult development in a way that illustrates the principles and ethics of developmentally informed teaching and learning:

Learning that people – students, clients, oneself, etc. – orient, view, and operate in different ways, itself, isn't too magical. What is incredibly impactful is the recognition that adult developmental frameworks (a) describe and organize these various ways in a manner that richly dignifies people for who they are now, (b) can predict, indicate, and graciously mark the growth trajectories of who people are becoming, and (c) offer educators life-affirming containers to facilitate students to more fully and freely step into their leading-edge possibilities – a massive hop past empowerment! (Almond, D., 2020, personal communication)

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## **Appendix: STAGES Education Chart by Abigail Lynam and Terri O’Fallon**

### Patterns of Development

- Receptive/Active/Reciprocal/Interpenetrative
- Concrete/Subtle/MetaAware
- Individual/Collective
- Person Perspective (1st, 2nd, 3rd, 4th, etc.)

### Learning Styles

- Receptive – Teach, Define, Lecture, Instruct
- Active – Experience, Apply
- Reciprocal – Interact and explore
- Interpenetrative – Synthesize, integrate & live it

### Principles of Developmentally-aware Education

- Meet learners where they are, and support them on their growing edges
- Recognize developmental diversity in a collective of learners
- Learn to design curriculum that is developmentally inclusive and adaptive
- Understand how your own development as an educator informs and shapes how you teach and learn
- Understand the importance of recognizing when a learner is stabilizing their development or ready for transformation

### Person Perspectives

- The first person perspective is an exclusive one way focus on one’s self and wants.
- The second person perspective is a focus on reciprocity between self and other. Can see one’s desires and those of others. Can stand in the shoes of another.
- The third person perspective is a focus on an observer who can focus on self and other(s). Aware of the qualities of abstract and formal operational thinking – analysis. New subtle self arises.
- The fourth person perspective is awareness on the reciprocal seeing of subtle selves: I see you see me, subtly. Aware of social contexts, internally and externally. Subtle self matures.
- The fifth person perspective is seeing the ever-changing nature of reality and the illusion of something remaining ever the same; Thus at the fifth person perspective there is an awareness of constructs – that everything is made up.
- The sixth person perspective, seeing the multiple perspectives, begins to step outside of those perspectives and to see the whole arising. The whole that is in their consciousness is all of matter, all of life and all of mind. Awareness of the unity of opposites including a grain of sand and the entire cosmos.



| Qualities   | Learner   | Exercises/Activities  | Questions/<br>Reflections |
|---|---|---|---------------------------|
| <p><b>Concrete, Collective Interpenetrative</b><br/>(approx. 14-18 yrs. &amp; adults) You are me and I am you concretely.</p> <ul style="list-style-type: none"> <li>- I am the rules, I am my role</li> <li>- Prioritize rules and social norms.</li> <li>- Focus on belonging. Defend group from inside and outside threats.</li> <li>- Conflict is seen as a threat to belonging.</li> <li>- Time frame: today and the past. Learn from the past, see consequences of actions.</li> <li>- Collective emotions such as guilt and shame are motivators.</li> <li>- Routine, order and following the rules creates safety.</li> <li>- Shadow – fundamentalism, righteousness</li> </ul> | <p>Views teacher as the ultimate authority. Expects and needs highly structured learning environment to either conform to or rebel against. Wants to know the rules. Challenged to speak up individually in class, to think outside of the collective norms or to do group work. Right and wrong answers to questions. Individual feedback can be very threatening. Is likely to not challenge the teacher directly. Follow learning traditions. Value clear hierarchy. Status, appearance, material goods, reputation and prestige are valued.</p> <p><b>Focus or Meaning of Education</b></p> <p>To maintain the past and respect tradition, by being good, disciplined and following the rules you have a guaranteed place in society.</p> | <ul style="list-style-type: none"> <li>- Topical discussion groups (not open-ended)</li> <li>- Clearly structured learning activities</li> <li>- Right and wrong answers</li> <li>- Concrete skill development – planning and prioritizing – building something tangible, designing an experiment and the steps to complete it.</li> </ul> <p><b>Stretch</b></p> <ul style="list-style-type: none"> <li>- Visualize a plan for the future.</li> <li>- Think critically &amp; independently</li> <li>- Rational analysis of subtle ideas</li> <li>- Abstract thinking</li> <li>- Freewriting and brainstorming</li> <li>- Assertiveness training</li> <li>- Recognition for initiative-taking</li> </ul> |                           |
| <p>2.5 Conformist</p>   | <p>Transition</p>   | <p>Transition into the Subtle tier – 3 parameter change – catalytic. Often happens when people go away to college or leave home for the first time. Move from a concrete, collective, and integrated stage to one that is Subtle, individual, and receptive. My group is not necessarily all there is, or all that is important - support individuals to stand out on own and find new collectives. Think critically and independently. Notice how facts might contradict group norms. Visualize subtle objects – subtle ideas, the future, abstract thinking.</p>  |                           |

|                   | Qualities   | Learner  | Exercises/Activities   | Questions Reflections |
|-------------------|---|--|--|-----------------------|
| <b>3.0 Expert</b> | <p><b>Subtle, Individual, Receptive</b><br/>New identity (often early college years)</p> <ul style="list-style-type: none"> <li>- Early 3rd pp, new Subtle self – can imagine/visualize what others are experiencing in their interiors</li> <li>- One way seeing – black or white, sees one side of an argument.</li> <li>- Diffuse attention – receiving lots of new ideas.</li> <li>- Past, present and months into the future</li> <li>- Can’t prioritize ideas – hard to know when good is good enough (perfectionism)</li> <li>- Concrete collective made subtle through rights related to appearance (gender, race, color, age, handicap)</li> <li>- Can be caught in analysis paralysis</li> <li>- Unique self</li> <li>- •Beta brain wave</li> </ul> | <p>This is a time of significant change and transformation. Often occurs when individuals go away to college or leave home for the first time. Can be overwhelmed by flood of ideas, thoughts and feelings. There is a loss of previous group identities and group norms that defined appropriate behavior and how to fit in. Can struggle to complete assignments, wants to be valued for their own thinking and ideas but can’t yet prioritize, time management is challenging. Can be one way in their thinking, as they are only just beginning to be able to think about their thinking. Linking disparate ideas through systems thinking is very challenging. Needs the teacher to be an expert in their field. Can lose respect or struggle with more “collaborative” teaching or pluralistic ways of seeing.</p> <p><b>Meaning of Education</b></p> <p>To assure the future. Become an expert on something so that you can be of service to society and build useful things.</p> <p>Education... “is very important to me” and “is the key to success”</p> | <ul style="list-style-type: none"> <li>- Feedback only from trusted experts</li> <li>- Group work – can tend to take over, may not be a good team player, micromanage others</li> <li>- Abstract thinking – science of probabilities, architecture, engineering</li> <li>- Brainstorming – individual ideas and perspectives</li> <li>- Observation of thinking and social norms, behaviors – new ways of thinking and behaving</li> <li>- Debates</li> </ul> <p><b>Stretch</b></p> <ul style="list-style-type: none"> <li>- Focusing their attention on thinking, planning for the future.</li> <li>- Reflection – thinking about thoughts and feelings</li> <li>- Consider more than one side of an issue (see both sides)</li> <li>- Structured and directed group work</li> <li>- Prioritizing ideas.</li> <li>- Time management tools</li> <li>- Interpersonal skill training</li> <li>- Critical thinking &amp; decision making</li> </ul> |                       |
| <b>Transition</b> | <p>One parameter change. Pressured by complexity – time, resource limits, 100% perfectionism becomes too inefficient. There is a greater sense of linear time of past and future and therefore can work with subtle cause and effect (can figure out reasons or “why”, can analyze). Beginning to prioritize ideas, to make use of and act with all the new ideas and ways of seeing – set goals and plan for the future. Concentration practices are helpful – focusing attention, prioritizing ideas, creating plans. Reflection and self-reflection. Discern when a project or assignment is complete or good enough.</p>  |  |  |                       |

|              | Qualities  | Learner   | Exercises/Activities   | Questions/<br>Reflections |
|--------------|--|---|--|---------------------------|
| 3.5 Achiever | <p><b>Subtle, Active, Individual</b><br/>Identity fixes.</p> <ul style="list-style-type: none"> <li>– Focused attention (zooming in on goals)</li> <li>– One way seeing – subtle parallel play, agree to disagree. Either/or-choice. Leads to competition.</li> <li>– Future-oriented</li> <li>– Science is the new magic/cause effect truth</li> <li>– Individualize the collective thru laws to protect individual rights (patents, brands)</li> <li>– Beta brain wave matures</li> <li>– Mastery and power in the subtle world of ideas</li> <li>– Concern for human rights</li> <li>– Thinking about thinking and feeling; planning, analysis becomes ordinary.</li> </ul> | <p>The qualities and capacities of this stage are often an end goal for college education – to create learners with an internalized locus of control, and their own sense of agency and self-direction in relationship to their career and learning goals. They can think about and reflect on their own thinking, feeling and behaviors and adjust and prioritize them in favor of their goals. They are often more competent at time and project management. They are not yet able to think contextually and therefore are still either/or thinkers seeking a right answer to a challenge. Tend to talk “at” rather than “with”, subtle parallel play. Value feedback and group work if they help to achieve a goal. Believe in linear cause &amp; effect and objective rationality.</p> <p><b>Meaning of Education</b></p> <p><b>Education...</b> “is the lifeblood of society, as we learn we grow and enhance our ability to achieve our dreams and desires.”</p> <p><b>Education...</b> “is incredible! I have a constant thirst to keep learning new things. I'm finally learning to view success in terms of my own self-developed goals, rather than what the teacher thinks about me or what the grade says.”</p> | <ul style="list-style-type: none"> <li>– Setting, planning and achieving goals</li> <li>– Giving and receiving feedback in support of goals</li> <li>– Outcome-oriented educational goals</li> <li>– Assessment and evaluation</li> <li>– Project management with benchmarks and feedback loops</li> <li>– Reflection – thinking about thinking and feeling</li> <li>– Deductive Reasoning</li> <li>– Create linear, goal-oriented systems</li> <li>– Concentration practices. Mindfulness exercises</li> <li>– Student-directed learning activities</li> <li>– Debates</li> <li>– Self-directed learning</li> </ul> <p><b>Stretch:</b></p> <ul style="list-style-type: none"> <li>– Reconsider goal focus to achieve more balance, overall happiness, time for family and friends etc.</li> <li>– Begin to think contextually – both/and, it depends, discussions.</li> <li>– See the non-linear pathway to goals, or unexpected outcomes positive and/or negative</li> <li>– Subjective and objective thinking</li> <li>– Collaborative and reciprocal group work</li> </ul> |                           |
| Transition   | <p>Two parameter change – Collective and Reciprocal. Key Achiever assumption: There is a real truth out there to be discovered so I can be the master of my fate through my own initiative. Begins to discover the way the Achiever’s expectations are not accomplished. Beginning need to think “outside the box” – challenge assumptions, expectations. Burned out, seeks balance, inner fulfillment. Begin to be aware of multiple perspectives/voices/ways of seeing and being, that can be contextually dependent. Awareness of multiple inner voices that might have conflicting needs and interests</p>   |   |  |                           |

| Qualities   | Learner  | Exercises/Activities  | Questions/<br>Reflections |
|---|--|---|---------------------------|
| <p><b>Subtle, Collective. Reciprocal,</b><br/>I see you see me, subtly</p> <ul style="list-style-type: none"> <li>- Relativism “it depends”, pluralism</li> <li>- Both/and thinking: Subjective and objective</li> <li>- Attention: Open awareness, mindfulness.</li> <li>- External contexts – socio-economic/cultural/ethnicity identities – affect internal interpretations</li> <li>- Reality is socially constructed</li> <li>- Adaptive patterns in systems (like a bird in a flock)</li> <li>- Multiple interior voices – “a part of me wants this, a part of me wants that”</li> <li>- Welcomes feedback for authenticity</li> <li>- Egalitarian; All ways are equally valid</li> <li>- Not inclined to categorize, reject hierarchies</li> <li>- All thoughts and beliefs are equal, except those that profess inequality</li> </ul> | <p><b>Learner:</b> Pluralist learners seek reciprocity with other students and the teacher. They value opportunities to explore contextual awareness (inner and outer) and likely want the teacher to join them in that – to step down from the hierarchy and engage in mutual learning and discussion.</p> <p><b>Meaning of Education</b></p> <p><b>Education...</b> is intrinsically satisfying. For me, true education is less about facts (though valuable) and more about discovering the great principles of what life is about.</p> <p><b>Education...</b> enables freedom and choice in our modern society; but there are many disadvantaged groups that do not have access to education; it seems important that education be available for everyone.</p> <p><b>Education...</b> is a life-long process. It can be formal, through schooling and learning events, and it can be informal in the lessons learned each day.</p> <p><b>Education...,</b> the system I work within, is being reimagined and transformed as a learner-centered and dialogical process.</p> | <ul style="list-style-type: none"> <li>- Integrating multiple perspectives and contextual thinking into all content areas</li> <li>- Dialogical learning – discussion groups</li> <li>- Self-reflection exercises</li> <li>- Empathy, perspective-taking and shadow exercises</li> <li>- Cultural awareness/ responsiveness training</li> <li>- Recognize more subtle forms of – isms. Micro-aggressions.</li> <li>- Student-centered and student-directed learning</li> <li>- Teacher or faculty as mentor</li> </ul> <p><b>Stretch</b></p> <ul style="list-style-type: none"> <li>- Prioritizing contexts</li> <li>- Awareness and attention exercises – zooming in and out</li> <li>- Valuing and integrating technical expertise of 3.0, goal and outcome focus of 3.5, alongside their own co-creativity and adaptability.</li> <li>- Multi-generational timeframe</li> <li>- Explore polarities and divergent ways of thinking and perceiving the world.</li> </ul> |                           |
| <p><b>Transition</b></p>  | <p>One parameter change – Reciprocal to Interpenetrative. Key Pluralist assumption: Everything is relative. Dilemma: Overwhelmed or stuck in processes. Confronted by chaos/disorder (in mind). Need for lasting tangible results. Exhausted by cost of caring. Begins to see that some contexts are more useful than others and begins to categorize them. Begin to see ways of prioritizing internal and external contexts – see development over time. See the possibility for development and transformative change and how to play a role in the creation of it.</p>  |   |                           |

| Qualities   | Learner  | Exercises/Activities  | Questions/<br>Reflections |
|---|--|---|---------------------------|
| <p><b>Subtle, Collective.</b><br/><b>Interpenetrative, Integrated.</b><br/>I see you are me, Subtly</p> <ul style="list-style-type: none"> <li>– Attention: Aware &amp; focused (zooming in &amp; out)</li> <li>– Prioritize contexts</li> <li>– Multi-generational timeframe</li> <li>– See development of internal and external contexts</li> <li>– Nested developmental systems</li> <li>– Collective and individual Shadow projections seen on reflection</li> <li>– Authentic self arises</li> <li>– Integration of internal and external (personas, projections, introjections)</li> <li>– Interpenetration of contexts – we create contexts and they create us.</li> </ul> | <p><b>Learners:</b> Relatively rare even in graduate school settings. Strategists are able to prioritize among competing commitments, opinions and beliefs. Thus, they tend to value perspectives that are developmental, people oriented, inclusive of other levels of development, dynamic, and which foster continuous learning. This is an interpenetrative stage, so they take a view outside of systems and contexts and see their intersections, and so have the capacity to construct them as opposed to being constructed by them. Love to create transformative learning experiences for others, so may want to take over as the teacher.</p> <p><b>Meaning of Education</b></p> <p><b>Education...</b> is essential for improving ourselves and the world. I think our current education system is pretty broken. I want to see an education system that facilitates growth and teaches people how to learn and think, not regurgitate information and take tests. I want to see more embodied education.</p> <p><b>Education...</b> Is vital, the more people are aware of what is happening in the world, how our actions impact others, the environment, etc, the more likely we can continue to expand the understanding that we are all interconnected and our life is dependent on how we treat the Earth and its inhabitants.</p> <p><b>Education...</b> is a critical aspect of our development (in all its forms, institutional campuses and from "life") and only really ends when you've made the grave mistake of assuming you "understand it all".</p> | <ul style="list-style-type: none"> <li>– Generally self-directed as learners, they value opportunities to guide their own learning, dive deep into different content areas and to dialogue with teachers and fellow students in depth to find newly creative ways to address complex challenges</li> <li>– Shadow exercises – opportunities to reflect on and work with projections and judgements</li> <li>– Learn about nested systems and increasing complexity, experiment working across value systems and worldviews.</li> <li>– Seek feedback from multiple sources, personal growth practices</li> </ul> <p><b>Stretch</b></p> <ul style="list-style-type: none"> <li>– Recognize judgements in the moment.</li> <li>– See constructed nature of reality – emptiness of constructs</li> <li>– See their own subtle ego at play – hubris of knowing and hunger for transformation of self and other</li> </ul> |                           |
| <p><b>Transition</b></p>  | <p>Three parameter change – MetAware, Individual, Receptive, – this is a big change and can take years to complete. Key Strategist assumption: Through my own development, I can be the unique, authentic person I'm meant to be. Tired of endless striving and reaching to become myself. Increasing capacity to witness puts me in the moment and leads to seeing the mind's projections/constructions in the moment.</p>  |   |                           |

| Qualities           | Learner   | Exercises/Activities  | Questions/<br>Reflections  |  |
|---------------------|---|---|--|--|
| 5.0 Construct Aware | <p><b>MetAware, Receptive, Individual</b></p> <p>MetAware self arises. Awareness of awareness. In the moment witness. can see the recursive patterns of development, the individual construction of words and subtle boundaries-, projections in the moment, and how all this plays out. They are able to be agile, to see things that other people can't yet see, and to turn things inside out, upside down, &amp; in paradoxical ways to move processes forward. In the moment; learning is so great that one may want to change jobs, homes and relationships.</p> <p><b>Education...</b>could be viewed as the current social construct that transfers first basic, then refined, knowledge through the generations and as such reflects the overall unfolding. Its movement from physical skills to mental processes, from actions to symbols and is a well-fitting pattern for us humans in our role in evolution. It would be fascinating to see if this story changes in the coming centuries to include more of a listening to wisdom, a connection to the story of involution.</p> | <p><b>Meaning of Education</b></p> <p><b>Education...</b>comes divinely with every moment -- be it emotional, conceptual, spiritual, extraterrestrial.... I want to receive with the humor and grace that open me beyond my current understanding.</p> <p><b>Education...</b>is every moment when we are awake to this Life; we're only not learning when we're lost in our self-repeating loop of the thoughts we've thought a million times before.</p> | <ul style="list-style-type: none"> <li>- May want to do the teaching themselves – tire of being taught</li> <li>- Beginning awareness of awareness</li> <li>- See mind's constructions of definitions and boundaries</li> </ul> <p><b>Stretch</b></p> <ul style="list-style-type: none"> <li>- See the subtle ego at play</li> <li>- See others seeing you at the MetAware stage – reciprocally causal</li> <li>- Prioritize constructs</li> </ul> |  |
| Transition          | <p>One parameter change – MetAware, Individual, Active. Begin to actively engage constructs. Key Construct Aware assumption: reality is constructed by made-up definitions of words and boundaries. Dilemma: constructions are continuing to be reified by others who don't realize it. Some constructions are more useful to the world than others. I can construct consciously with my knowledge of amorphous definitions and boundaries, for the benefit of the world, categorize and prioritize, create in my area of passion.</p>  |   |  |  |

| Qualities  | Learner   | Exercises/Activities  | Questions/<br>Reflections |
|--|---|---|---------------------------|
| <p><b>MetAware, Active, Individual</b></p> <p>Capacities to bend, twist, redefine, construct, reconstruct, prioritize/ categorize and reify constructions, and to see unusual connections between very disparate paradigmatic fields occur. This is an active individual stage, interest in owning creative and unusual constructions in their field of passion that they have developed. Transpersonal individuals “have” their individual constructs rather than being “had by” them. They can see how <i>they</i> can develop these constructions consciously for their own benefit as well as for the benefit of humanity or for a planetary cause. There is one-way seeing at the MetAware level, frequently with a feeling that others can’t see them in return.</p> | <p><b>Meaning of Education:</b></p> <p><b>Education</b>...is often thought of as a structured learning process, yet I find it to be quite the opposite also, that is being open to the nothingness and allowing the empty to fill oneself, allowing a movement from a place beyond knowledge.</p> <p><b>Education</b>...grows exponentially as one opens one’s mind to ever more possibilities, understands preconceived limitations of the concept of mind and actively dismantles them to allow even more unlimited awarenesses to arise, breaking down contents into processes that then become the new contents with processes behind them until whole concepts and constructions of world and mind fall away completely.</p> | <ul style="list-style-type: none"> <li>– Witnessing in the moment in waking life is a natural spiritual practice.</li> <li>– Integrate emptiness and fullness, individual &amp; collective</li> </ul> <p><b>Stretch</b></p> <ul style="list-style-type: none"> <li>– Late Transpersonal begins to let go of their constructions into emptiness</li> </ul> |                           |
| <p>Two parameter change – MetAware, Collective, Reciprocal.</p>  | <p>- Key transpersonal assumption: As reality is constructed, I can impact the world by defining its terms, questions, and perspectives, and constructing with Awareness and Consciousness. Dilemma: My impact is also a reified construction. Tired of endless complex mind bending. Seeing that which is doing the constructing, I can let go into another more universal ‘I’ in which all preferences can coexist. Emerging desire for a simpler, more immediate contact with the Wholeness of Existence.</p>  |   |                           |

5.5 Transpersonal

Transition