

EXPERIMENTS IN SECOND-TIER COMMUNITY: COLLECTIVE

INDIVIDUALISM

INTRODUCTION

This paper describes an ongoing experiment in fostering development through an integrally informed educational program, called *Generating Transformative Change in Human Systems* (GTC). This program forms the structure for second-tier communities whose aim is to liberate greater service in the world, while holding the ongoing development of participants, facilitators, and the systems to which they are related.

In this presentation we will provide an introduction to the history and characteristics of the GTC program, present initial research findings of its impact and suggest questions for further research. Since the initial results of our research with the Leadership Development Framework (LDF) (Cook-Greuter, 1999) shows developmental shifts in program participants that exceeded our expectations, we offer suggestions for further research that explore the reasons for the implied impact the program is having on its participants' development.

What is this experiment in second-tier community that we have been engaged for the past five years? GTC is described on our website (2008) as an

... 18 month Professional Certificate Program [that] provides an initiation into the practical living of an integral life as it relates to transformation – the latest knowledge and theories, leadership approaches, integral life practice, integral assessment, learning community and fields, action inquiry, engagement in your emerging work and global issues. As the curriculum progresses we add greater depth in application of the integral approach by building on the foundations built in the opening months of the program; developing further life-enhancing practices and leadership

capacities tailored to your particular experience, strengths, life goals and future.

The core of the program is six five-day intensive retreats on the beautiful Olympic Peninsula in Washington State. These intensives combine deep individual reflection with interpersonal and group dynamics, theoretical foundations, and embodied practice and recreation such as hiking, kayaking and social events. Between retreats participants form learning teams, stay connected and continue to learn in online classrooms. In addition, reading, awareness practices, actual projects, and one-to-one coaching are blended into the format.

Any occasion like this is certainly an all-quadrant affair. Our web site speaks to the individual in the context of his or her own development. However, the design of GTC takes into account each of the eight indigenous perspectives (Wilber, 2006), which has allowed us to develop a rich multifaceted learning environment. The title of this thesis, however, evokes an emphasis in our own view of the program: that it is a process of “community development” that engages the individual in their development in the context of community and the systems in which they situate themselves, the planet and the Kosmos. This emphasis, in a sense, has helped us balance preferences towards individual developmental approaches with collective engagement as our approach to change. GTC is best viewed from a multitude of perspectives that enrich our understanding.

HISTORY OF GTC

We began the design and development of GTC in 2003 and launched the first cohort in February 2004 with twenty participants. Two cohorts are currently active including our seventh cohort which was launched in October 2008. Over these years, we

have gained significant experience, learned many difficult lessons, discovered many unexpected blessings and as a result, made extensive and continuous revisions to the program. Simultaneously, we have each undergone our own developmental shifts; engaging together in the development of GTC has been our own personal cauldron of growth, our own community of service, and our own practice has been an integral part of this dynamic experiment.

The birth of GTC transpired in the context of our own individual backgrounds. The four partners of Pacific Integral brought together diverse professional backgrounds. Two were life-long consultants with a focus on transformative whole systems change. One had a long career in cradle-to-grave education and one had spent several years in management positions in the high-tech industry. All of us were actively engaged as educators, consultants and coaches, sharing deep, life-long interest in human development, and a dedication to ethical, spiritual living. We had common interests in, and inspirations from the theories and practices of transformative change and integral theory related to the work of Ken Wilber (2006) and his integral vision.

Originally, we conceived of GTC as a consultant's development program, born of an interest in developing transformative interveners in organizational systems. We began a process of sourcing the deeper intentions of our life work, and very quickly the purpose and scope of GTC began to expand. Several themes emerged and continue to shape the program today.

GTC is a child of our own collective concern for the enormous challenges we face as a human, global family; this program aspires to awaken and engage our participants and ourselves in facing these concerns.

We each recognize our dedication to bringing theory into embodiment; we are fundamentally practitioners who are committed to translating theory into usefulness and seek to innovate its application into real-world challenges, infusing them with the innate perspectives of the people we serve.

We seek mutual integration between the intentions of our program and our participant's lives. GTC is the dialog between them and us, engaging together the embodiment of integral theory more fully, or life changes such as a divorce or a career transition – all these conditions form the ground for the program.

We are guided by a principle of the evolutionary impulse towards wholeness. We strive to see and evoke the greatness in our participants, the world and ourselves.

We embrace the principle of “integral diversity,” welcoming participants from a wide variety of backgrounds and actively inviting people from other countries to attend the program, usually providing a tuition scholarship. This intention arose not only out of a desire for diversity, but moreover from a sense that the work we are doing is situated in a world that is complex and holographic, and that bringing together multiple perspectives will deepen the experiment.

Our own individual and collective development is interwoven with the program; we are inviting others into an experiment of transformative change that we are engaged in ourselves, both as leaders and as participants.

These principles form the ground of our program and continue to transform as the program evolves. Over the last six cohorts, there has been significant change. We completely revised each new retreat design based on our own learning. For example, our understanding of how to facilitate learning between the sessions, online and off-line,

changed significantly as we tapped the patterns of learning of our participants. Through the refinement of our inter-session structures, we developed a more effective inter-session program.

We have engaged in an inquiry of how we might integrate international perspectives into the program by confronting some of our unconscious western-centric viewpoints, adapting to the practical needs of people traveling from other countries to the program four times a year and confronting the economic disparities that exist within the world's economy.

We moved our retreat locations allowing us to make the GTC intensive retreats a residential program in an intimate and beautiful environment conducive to learning.

The balance between emergence and structure has found its still-point in the program. Emergence supports many of the strengths of the program, but through our own experience and the encouragement and feedback from our participants we found that more structure in the design supports even more freedom.

When we first launched GTC, we worked with a single cohort; now we work with up to three simultaneously. To support this growth we invite promising participants to become facilitators in the program and their contributions have been profound; having once been participants themselves they offer eyes through which we cannot see.

OVERVIEW OF GTC

GTC is an integral graduate level educational program for developing individuals who can reliably initiate, design, and implement interventions on projects that bring about deep organizational or social transformation. The purpose of this program is to develop transformative leadership capacities within emerging leaders on our planet.

A brief overview of GTC in its current phase:

Structure. GTC begins with deep interviews and dialogs with the participants before the program. These initial conversations engage the participants in the process of the program and begin a mutually transforming process. Then, prior to the first retreat, all participants take the MAP, do pre-course reading and begin to engage with other participants online.

The core of the program consists of six five-day intensive retreats held at a retreat center in the Seattle area where academic and embodied learning within the context of personal, community and service projects are offered. Between each retreat, participants engage in an inter-session program that involves structured learning, practices, community dialog, and field-work. Interaction between the retreat sessions occurs in an online learning environment, conference calls, email, one-to-one coaching calls and informal meetings.

During the later stages of the program, the cohorts tend to form deep communities of practice that integrate their own life conditions into their collective work, as well as engage together in a major field project sourced out of their own intentions. This project has taken some cohorts into engagement beyond the formal end of the program. Six months after the program completes, all participants retake the MAP and engage in follow up interviews that support our ongoing research of the impact of the program on participants' lives.

We continue to support the development of a community of GTC graduates and the specific intentions of the cohort to continue its purpose in the world, if that feels alive to them.

Curriculum. GTC's curriculum weaves together several key themes: First, a theoretical and practical background in leadership, development, and the transformative change process, which seamlessly integrates several bodies of work: Leadership Development, Action Inquiry (Torbert, 2004), Developmental Theory (Loevinger 1989a), Cook-Greuter, 1999, 2003), Dialogue (Bohm, 1996), Issacs, 1999) Integral Theory (Wilber, 2006), Spiral Dynamics (Beck & Cowan, 1995), Presencing (Scharmer, 2007; Senge, 2004), Learning Organization Theory (Argyris, 1978), Subject-Object Theory (Kegan, 1994), Insight Dialogue (O'Fallon & Kramer, 1998), and several others with flavors from many different Eastern and Western spiritual paths and traditions.

Second, throughout the program, the participants are supported in an intensive process of practice, designed to develop greater integral awareness and embodiment. Participants work with specific practices at each stage of the program, as well as practice action and reflection individually and collectively in each learning process.

Third, each participant is held and supported in evoking and embodying their highest self. This practice takes place in specific learning contexts, in coaching, and in community practice.

Fourth, each cohort develops as a community, through the learning and practice of second-tier practices, such as Insight Dialogue (O'Fallon & Kramer, 1998), courageous intimacy, action/reflection, meditation, and service in the world. An important part of this community development is the spontaneous and planned individual and collective expressions of joy that take place, including evening kayaking trips, "talent shows," singing and dancing, and the pure joy of being with friends on a long summer evening watching the sun set over the Olympic mountains.

Learning process. The GTC learning process is intended to support participants in achieving embodied mastery of the material we present during the program. Each aspect of the program might be acquired at various levels of depth:

Basic knowledge – concepts are learned through cognitive study. Participants are able to explain basic concepts to others.

Distinguishing knowledge – participants are able to use concepts and practices to identify and distinguish real world examples of learning.

Applied knowledge – participants are able to apply concepts and practices to real world situations through practice in workplace.

Embodied knowledge – participants have integrated concepts and practices into their habits of thinking and acting, such that they naturally exemplify them.

Innovating knowledge – participants are able to find new applications and innovative ways to apply new concepts and practices, such that the results are something greater than the original learning.

Quality of the Field While any notion of the quality of the GTC “field” is purely subjective, it is such an integral part of our experience and theory of the program, it is important to mention. Throughout the experience of the program, we foster an environment that evokes certain qualities, energies, states, and perspectives that in themselves evoke actions and states in the participants that we see as transformative. This environment has a feel unique to the time and space of the process that seems to open doors for the participants and the facilitators. When those of us dancing in this space reflect on what we do together, we often refer to the field of the GTC and how it impacted our state, our collective sense, and our actions together. The qualities this field

seems to have for us is that it is both transcendent and embodied, reverent of the human domain, playful and loving, challenging and real, wildly free and exploratory in perspective taking, and inclusive of the trials of sentience in our moment of time. There is also a shadow to this which is unique to each group and which we actively explore.

Co-creativity and Emergence. While GTC does in fact have a structure at any point in time, we ultimately act intuitively, seated in these questions: Where do these individuals go next? What purpose is calling this cohort into the world in this moment? How do we foster that emergence? As we step through what we know – steeped in our designs and plans – we also live with the perspective that all of this is a co-creation and this moment is in conversation with us about what it needs most. This informs the way we implement each step of the program: by listening to ourselves, the participants, the heart of the cohort and the world. It also takes shape as we design specific liberating structures to support the emergence of whatever the individuals or cohort needs next, with full understanding and intention that the individuals authentically living within the context of a second tier community is the experience we support and where development is not the conversation in the foreground of our work together. Thus any individual developmental growth is as a result of this second tier collective experience of service in the world, rather than the experience being designed for the sole purpose of development.

EVOLVING RESEARCH DESIGN FOR THE GTC PROGRAM

As we continued to develop the GTC program we were constantly scanning to see if we could find similar applied integral programs that had research on its effectiveness but found little research about independent applied programs like the GTC program. In addition to the feedback reports from our participants, we wanted to find out what we

could about our program's responsiveness to our participant's embodiment of the integral frame (Wilber, 2006). As we looked, we didn't notice other non-degree applied programs that were conducting integral research on themselves. We felt that perhaps we could begin to close that gap in the research by beginning to do some research on ourselves.

The Research Questions

We began by looking internally to the GTC program. What did we want to know, and for what purpose? The first questions that seemed relevant were:

1. What kinds of people were attracted to our program?
2. Did individuals change as a result of the applied work we were engaged in learning together?

The Significance of this Research

Though we realized that our GTC program wasn't isolated relative to the events in the lives of our participants, we knew that if we found an inventory that could document change in individuals, our program could be seen within the context of that change. As an autopoietic, self-replicating system (Luhmann, 1995), learning as it learned, the research dimension of GTC was also to evolve in concert with this approach. So the significance of this research is two fold. First, it will be significant if we can show that the participants in our applied program show a noteworthy change or changes by relevant measures.

Secondly it is significant that we are consciously designing an autopoietic systems approach to the research itself, dynamically steering our research based on the tensions we feel need a response in a research venue. Thus our research design is continually

evolving as we are experimenting with new integral approaches to research that respond to the evolving questions we are asking.

Methodology

Given the questions we were asking ourselves about our participants, we wanted to find a methodology that would allow for the measurement of changes in our participants and possibly our cohorts, as well as support us in dynamically navigating the growth of our program with real world data. We decided to use an instrument that would measure center-of-gravity development in the individuals entering and leaving our program, on a test-retest basis, and that could also be used as a group measurement.

The instrument we decided to use was the Leadership Development Framework first developed by Jane Loevinger (1989a) and re-visioned by Susanne Cook-Greuter (1999). This instrument would give us both a stage measure as well as an incremental (“TWS”) score as a measure of developmental changes that would respond to our initial questions.

The Participants

The participants entering our GTC program, beginning with the third cohort (GTC 3), have all taken the MAP. We also gave the inventory to GTC 2 half way through their program. GTC participants range in age from 22 through 65, have educational levels that range from two years in high school through post-PhDs. Examples of their walks-of-life are, custodian, University professor, MDs and dentists, unemployed, managers, senior executives, business owners, consultants, psychotherapists, governmental executives, PhD students, executive directors of NGOs, naturopaths, spiritual teachers, executive coaches, health care executives, green builders, and others.

Seventy four participants have taken the initial MAP. Of those, about 35% initially scored as Achievers, 26% scored as Individualists, 23% scored as Strategists, 7.5 % scored at the Construct Aware stage and 6 % scored as Unitives. Since none of the participants have scored at the pre-conventional levels, or at the Diplomat or Expert levels, our lived experience in the GTC program has been with the later five levels of development.

The Evolving Research Process

Each participant took the MAP (Cook-Greuter, 1999). We sent the initial inventories to Susanne Cook-Greuter, who scored them and sent the results to the participant and the faculty. The initial research plan was to engage the participants in the program, and then to retest them six months after they completed the program. This would give them a resting period after they had completed and also would allow two years to lapse between tests when we could determine if there was a developmental shift in the participants.

Immediately after the first round of testing, however, we found that just knowing the results of the LDF had an impact on our research aim. First, we had had no embodied experience engaging with people while knowing what their center-of-gravity was. Our imagination was quite active relative to what we thought manifested at each level, but we found that we really had misunderstandings and unfounded assumptions when it came to the lived characteristics of these levels in real human beings. Immediately we were thrust into a grounded inquiry of what these developmental levels really described. What was the meaning of “Achiever,” “Individualist,” “Strategist,” “Construct Aware,” and “Unitive”? We engaged with these empirical questions both with our participants and

ourselves. Living arm-in-arm with real people put many puzzles in our mind, and new research questions began to arise before we ever got to the retest aspect of the first phase: “Why did some people who scored at an earlier level seem so wise while some people at a later level seemed to have an entirely different kind of intelligence that didn’t seem to relate to this wisdom factor?” We found our initial two questions multiplying, and, as before we couldn’t seem to find actual research to describe the real human phenomena we were encountering.

In addition, just knowing the developmental levels of our participants deeply influenced the continual design of the program, which as a result evolved in a different way than it would have without the scores.

Thus our research looped back again to the question-forming stage even as we still hadn’t gathered data on the retest in the first phase of our research.

Our methodology, then, is evolving: We began with phase one, testing for the developmental levels of the participants, and doing a retest. Phase two now involves a grounded theory approach to noting the actual behaviors of people in these various stages and generating theories as a result, which we will further research in a rigorous way.

After we got the retest results on the participants of GTC 3, we were stunned by additional questions. The results seemed to be quite remarkable compared to the possible changes suggested by theorists (Kegan, 1995; Wilber, 2006). These results prompted the third phase of our research design, which responds to the question, “What is the developmental growth of the participants of the GTC program compared to a program that is not centered in an integral curriculum?”

We have found a control group, an MBA masters program and are now setting up this third phase of our research. In concert with this we have not only the TWS scores which one can use to describe the developmental level of a collective but also can determine whether a group changes. We are also doing both phenomenological (zone 2) research with the participants as well as hermeneutic (zone 3) research with pre- and post- interviews and written essays, to get a sense of the essence of the group as well as the essence of the individuals (which come from the individual feedback on the MAP).

In summary we are dynamically navigating with an evolving research design which is giving us real world, in-the-moment feedback which generates tensions, which when initially relieved, change the dynamics of our work with the program, which in turn generates more research questions to which we must develop a design, and even in the designing of the research we find our engagement with our participants, and the design of the GTC program itself changing and evolving, in a self-referencing, self-replicating autopoietic way. Our research is none other than a communication system that is evolving us in the fashion of a Mandelbrot.

Validity Measures

We have completed the first retest of the MAP with GTC 3. As a means of verification of the retest scores (the first scoring was done by Susanne Cook-Greuter), an inter-rater reliability check was done to assure results. There was agreement on all but one inventory and that inventory agreement was within a half a stage. That score was finalized at the conservative rating.

Limitations of the Study

The GTC participants are involved in life in multiple ways, so, though changes in their developmental levels were found, the only claim Pacific Integral can make about these results at this time is that during the time of the developmental changes of these participants, the GTC program was part of their lives.

Results of the Research

Our first round of test-retest results of the MAP with the participants of one cohort showed a half level growth in 20% of the members, one to 1 1/2 levels of developmental growth in 40% of the participants and a two to 2-1/2 level increase in developmental growth in 40% of the participants. Those who moved half a level had a response range of 7 out of nine levels. The *n* for this group is ten.

Our second set of test-retest results with the next cohort showed a gain of one level with 5 participants, three levels by one participant and four of the members of this cohort remained the same; however two of those members were already at the Construct Aware and Unitive levels, and thus had very small research field to grow within.

Discussion

The Test-retest Research using the MAP

It is difficult with such small numbers to make many claims. However these are real changes that can be shown with a valid test-retest, inter-rater reliability.

Many interpretations can be made as to why these results were achieved:

The Participants

The participants themselves may be attracted to a program such as ours because they are ripe for transformation, and seekers of a change in development (Helson &

Srivastava, 2001). Some of our participants find themselves in life changing disorientations, including job changes, relationship changes, and may well have shown developmental changes in any kind of program, or without any program at all.

Some of the participants were also involved in other programs concurrently with the GTC program, such as Ken Wilber meet-ups, Seattle Integral, Kore Leadership's WILC program, a leadership program for women and individual coaching, counseling and core energetics programs.

One's initial level of development may make a difference as to how much change occurs. Earlier levels may, as a result of being in a culture fashioned at a later level actually develop more quickly and then slow as they reach later stages. In fact, with group one this may have been a partial truth; two people at post conventional stages made these significant moves but even more people saw movement whose initial score was at the conventional levels.

In group two the two latest scoring people, one at Magician and the other at Unitive scored at the same level. The Unitive couldn't have scored later because there is no later level to score into, and the Magician had a very small research window to score into.

The GTC Program

The GTC program could be an explanation for the developmental changes that we found in the retest. Our program is designed with multiple levels in mind and the container is designed to have no developmental lid that would freeze people at their present level of development. This happens both by program design and by way of the participants and faculty themselves, representing levels from Achiever through Unitive.

By being in the company of a milieu of people who are earlier, the same as, and later levels of development a pull on consciousness could be realized. (Wilber, 2006)

Furthermore, if, as it is postulated, an integral approach will support people's development then the container and curriculum of the GTC program would be supportive of change and development.

It could also be that feedback to people about their developmental level would help them situate themselves more honestly in the developmental scheme and thus find ways to target their own personal practices as a result. Personal practice is one part of the GTC curriculum but is emphasized as only one important part of the work we do together.

Development in-and-of-itself is not a primary focus in the program. The developmental trajectory is taught but mostly used in an applied way through finding ways to engage with others at work, at home, and in community in a skillful compassionate way, relieving suffering as much as possible. The curriculum and container are designed to be friendly to consciousness, inviting its comfort in an implicit way, being perfectly fine with everyone just as they are.

The MAP Inventory

The testing approach itself may be responsible for an indication of growth, for over the years a gradual adjustment needs to be made to accommodate the changes in the way the Ogive and scoring is done to adjust for the wider span of consciousness that continues to appear. When Loevinger (1989a) first began this research process the levels that were represented were symbiotic through the Autonomous (1970), and Cook-Greuter additionally researched the levels of Construct Aware and Unitive (1999). More material

related to both of these levels has arisen in the intervening years. The Ogive measures (Loevinger & Wessler, 1970) and the scoring may need adjustment once again, and if this is so, then the scoring would likely be more stringent. Even so, it wouldn't likely make more than a half a stage scoring difference and this still wouldn't account for all of the changes that were documented in this scoring.

Comparison of the two Cohorts

At times, remarkable events happen, and it could be that cohort one was in the right place at the right time and that their scores will stand as remarkable, but not be replicable by other cohorts. However, GTC 4 has also had their retest, it appears that there is significant growth in six out of the 10 members of that cohort; we have begun the longitudinal process of documenting the trajectory of development of the participants in our GTC programs. In another three months we will have additional data for Cohort 5.

Future Research

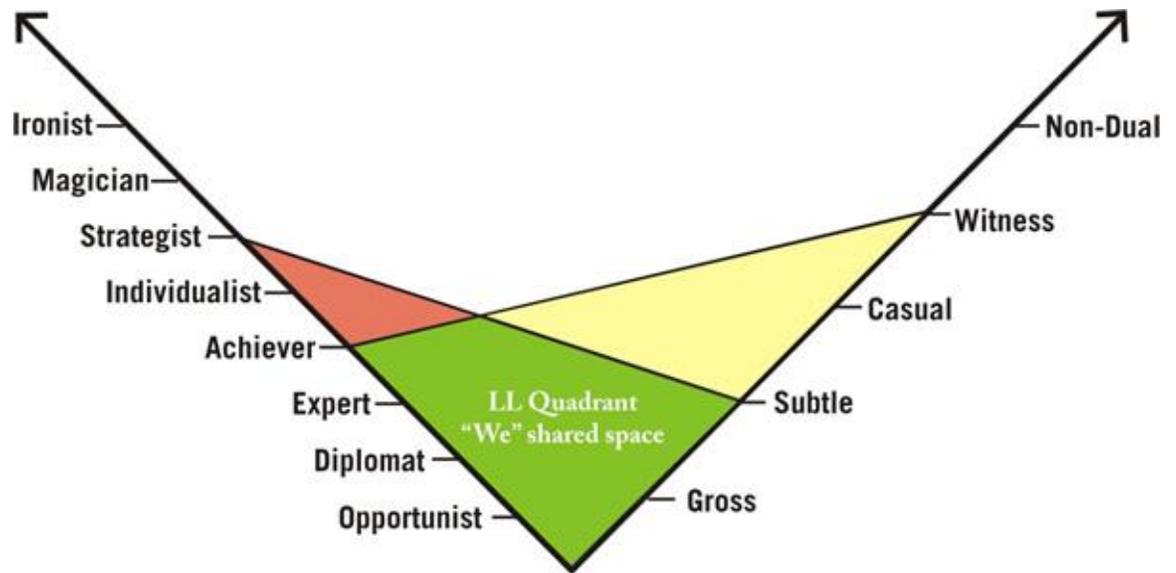
Our work with the Integral Frame over the past 5 years has been surprising, puzzling and stunning to us as we dynamically navigate these unsettled waves of program design. How does one learn to design a program such that consciousness can be raised with the dedication, compassion, love, and rigor with which one raises a family, such that it all seems to be happening in an organic and human way?

Research on the Interpenetration of Structure Stages and State Stages

Our work with our cherished colleagues, the participants in our GTC program, has taught us that much of what we thought and much of what we know, is indeed an illusion, and ongoing theory building is arising out of the bowels of discarded misunderstandings. One such theory has arisen from the discrepancies we have found in participants who test

at the same developmental level but have very different ways of presenting in life, aside from surface structures, morals and personalities.

This theory adds another focus to the Wilber Combs Matrix, (Wilber, 2006) proposing that the combination of state stages and structure stages allows consciousness “room to roam” which can account for these very different human presentations. The following image depicts our theory showing the triangle space for two individuals’ structure stages and state stages, and the inter-section of the two for the lower left quadrant “we” space between them. This model offers one plausible explanation for some of the differences we see in people:



It is our intention to do research on the relationship between the state stages and the structure stages in an attempt to support the empirical observations that we have had with people.

Research on the GTC Container

The GTC program holds promise for supporting the development of an integral consciousness, given our initial results. At present we are designing a longitudinal research project using a control group from an accredited MBA program that does not have the integral frame as its primary focus. We plan to use a test-retest process with the LDF to verify any differences between the two programs.

We also speculate that part of the reason that our participants may have developed in this first tested group is because as a part of their container, there is a range of participants and faculty who are at every level of development from Achiever through Unitive. It would be reasonable to see if we could obtain MAP results on everyone involved in our control MBA group program, including the faculty as well. Perhaps this is one of the factors related to the growth of the participants.

In addition we are using the MAP's TWS group score to measure the development of each cohort, and are conducting interviews which will provide both phenomenological and hermeneutic information including responses to these questions: "What were the initial conditions for the participant that allowed for rapid development?" and "Did their stage transformation enable them to be more effective in the rest of their life including generating transformation in human systems?"

Taking the GTC Research into the Field

Pacific Integral also does consulting work, and part of our research proclivities are to see if successful GTC program processes can be applied in our work in bringing about whole systems change in organizations and social systems. The GTC program may

be a birthing ground for innovative consulting practices that can change collectives of multiple kinds.

Research on Emerging Levels of Development

We know that consciousness continues to develop, and we are supportive of continuing research on the latest levels of consciousness that is emerging. With the support of renowned researchers we hope to be involved with the continuation of research on these most rare levels as they emerge.

Research on Research Processes

We know that with each level of development new research approaches arise. What kinds of research methodologies will emerge as consciousness emerges? What integral methodologies will work to engage all eight zones, or several of them at once rather than using eight different research methodologies in order to get to the eight research perspectives of any one event. Thus another research question is, “What research approach can give us a seamless glimpse of all eight perspectives at once, for any one event?” As an initial foray into this process we have begun to use the SCT responses in groups to extract phenomenological and hermeneutic themes, in an attempt to depict the essence of a collective and group meaning making themes.

Summary

We live as observers of life, at some point, and this is the basis of research. We have found in our GTC experiment that we ourselves are transforming along with the participants. Who is the teacher and who is the student? Who is the researcher and who is the subject? Who is the dreamer, and who...is the dream.

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