

THE JOURNEY OF PERSONAL AND ORGANISATION DEVELOPMENT – WITH SOME MAPS FOR THE TRIP

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Abstract: *How do individuals and organizations navigate a world with higher levels of complexity, uncertainty, and change? How can the frameworks of developmental psychology provide maps that help us to better manage the terrain of the world we live in? There are a number of studies which indicate that an understanding of the signposts of the stages of developmental psychology can help people and organizations build capacity to deal with the challenging environments that most organizations now face. This article provides some of the history and practical insights into how these maps can help people and organizations be more effective, as the author has done extensive work and research in this area.*

Keywords: *Developmental Psychology, Organisation Development, Personal and Leadership Development, Complexity, Sensemaking, Meaning-making, Action Inquiry, Action Logics.*

Introduction

Individuals and organisations are facing higher levels of complexity, change, diversity, and uncertainty than ever before (Charan, 2009). These times calls for people to be able to effectively manage complex challenges, navigate faster rates of change, as well as elevated amounts of diversity and uncertainty at work. However, as Kegan (1994) suggests in his aptly named book “*In Over Our Heads*,” the demands of the current environment are often mismatched with our order of consciousness or mental capacity, which raises the following question: In these times, how can we develop and expand our individual and collective “agility”, where new challenges and opportunities can be met with elegance and effectiveness?

Two Organizational Development (OD) “gurus” are challenging us to re-look at development. In “*Is there a new OD?*” Bob Marshak (2006) ponders what is different about OD in a postmodern world. What impact does a socially constructed world have on life in organisations? In the realm of leadership, Warren Bennis (2007) advocates for new models of leadership to be created, ones that better reflect the world we live in. As he argues in “*The Challenges of*

Leadership in the Modern World,” new models would provide new methodologies and roadmaps for expanded capacity for future success.

After briefly considering developmental psychology and sense making maps, this article looks at the origins of developmental theory and then provide some practical insights into how these maps can help people and organizations be more effective.

1. Developmental Psychology and Sense making Maps

The field of developmental psychology offers some models and ideas on how to build capacity in today’s environment. Kegan (1994) defines developmental psychology as a theory of the psychological evolution of meaning-making systems. Having a more evolved way of making sense of the world would increase a leader’s capacity to deal with higher levels of complexity, diversity, and uncertainty. This could add a valuable dimension to personal and organisation development.

A more evolved sense-making system is a “vertical” journey, rising up to more expansive ways of seeing the world, like climbing a mountain to get a better view. Most of the development in the world now is done on horizontal playing fields, with the intention that people will elevate to new heights. But what if we had a map of the ascent, in order to raise the possibility of more expansive perspectives for the world we live in.

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The field of developmental psychology offers a map of the territory, by identifying signposts, called stages, which people pass through on their development. The further along a person is on the path, the more able they are to manage complexity and uncertainty, and the map provides direction for possible future growth. Once people are made aware of the map, they can choose to consolidate within their current stage and/or to plan on how to begin their transition to a higher, or later, stage.

2. Origins of Developmental Theory

The early days of developmental theory focussed on children, and how they developed thinking abilities, as Jean Piaget pioneered child development stages. While he did not include stages for adulthood, it was the good start to the understanding of how humans develop.

Abraham Maslow (1971) introduced the idea of stages of adult development, with his hierarchy of needs. While his theory is well-known throughout the world, there is little empirical evidence to support that his hierarchy reflected how adults actually develop (Soper, Milford, & Rosenthal, 1995). Later, psychologists like Erik Erikson, Jane Loevinger, Lawrence Kohlberg, Clare Graves, and others, focussed on researching and offering different frameworks to better explain the stages of adult development. They began to try to understand how some adults were able to develop to different levels of orienting themselves to their world and to their life. Each of the researchers identified meaning-making systems, or stages, that are more effective in dealing with the complexities of life than the previous stages. These researchers all found that the stages unfold in a specific sequence, and that each stage transcends and includes the previous stages.

Starting in the early 1980s, researchers began to look at how stage development impacted leadership and organization development (Bartunek, Gordon, & Weathersby, 1983). Bill Torbert brought their work is being elaborated on here because of their focus on both personal and organizational shifts, within the context of organisations.

Torbert and Rooke (2005) believe that leadership philosophy or styles are not as

developmental theory more fully into individual and organisation development with his 1987 book "The Corporate Dream".

Torbert calls the development process "Action Inquiry". He writes that Action Inquiry is "a way of simultaneously conducting action and inquiry, as a disciplined leadership practice that increases effectiveness" (2004, p1). Regardless of positional power, anyone can practice action inquiry. A diligent practice of Action Inquiry can expand a person's Action Logic, which is described as a person's strategies and schemas for reflecting on and making sense of their life experiences. So the later and more developed a person's Action Logic, the more effective they are in managing complexity.

Since 1987, a number of authors have written about stages of making sense of the world, and how it relates to an organisation context. To name a few, Kegan's *In Over Our Heads* (1994) includes a chapter on management; Beck and Cowan's *Spiral Dynamics: Mastering Values, Leadership, and Change* (1996); Barrett's *Liberating the Corporate Soul: Building a Visionary Organization* (1998); and a number of books by Ken Wilber, including *A Theory of Everything: An Integral Vision for Business, Politics, Science and Spirituality* (2001).

In the domain of Leadership Development, Bill Joiner and Steven Josephs built on the work of Torbert with what they call *Leadership Agility: Five Levels of Mastery for Anticipating and Initiating Change* (2007). They say that being mindful about following a development plan can increase leadership agility, make a difference in the world, and help leaders enjoy the person they become in the process.

3. Action Inquiry and Action Logics – Stages of Development in Personal and Organisation Development.

In their book "Personal and Organization Transformations," Fisher, Rooke, and Torbert (2003) speak to our profession's passion for supporting development and transformation. important as a person's stage of development, their "Action Logic," in determining effectiveness in times of uncertainty. The terms they use for the Action Logics, from the earlier to the later stage, are Impulsive, Opportunist, Diplomat, Expert,

Achiever, Individualist, Strategist, Alchemist, and Ironist. They also have done research those points on organizations needing someone with at least a “strategist” action-logic on the team in order to transform itself.

They have also identified a parallel track for organisational development, and the stages are named Conception, Investments, Incorporation, Experiments, Systematic Productivity, Social Network, Collaborative Inquiry, Foundation Community of Inquiry, and Liberating Disciplines.

These Personal and Organisational stages (“action logics”) provide us another way of looking at how we orient ourselves to our work and life. With this developmental perspective, we can gain an extra view of our motivations, communications, and how we make decisions. Individuals and

Organisations do not operate at just one stage, but along a spectrum, so the framework allows for meaningful reflection for how much of our thinking and action is in the various action logics. Aspirational questions like “What would a Strategist or Alchemist do?” or “How would a Foundational Community of Inquiry look at this?” can help expand our thinking and actions to new levels.

Some distinctions should be made between these stages as determined by Torbert and Rooke (2005). To this end, brief explanations of the seven of the stages are included in Table 1 below, with the later stages placed at the top of the table. The seven listed are the most common of the nine mentioned above, as these are the ones written up in the HBR (April, 2005) article “Seven Transformations of Leadership.”

Table 1 - Parallels between Personal and Organisational Stages of Development

Stage	Personal Stage	Organisational Stage
7	Alchemist Disintegration of ego-identity; blends opposites; creates “positive-sum” games	Foundational Community of Inquiry Manage different paradigms/frames within the organisation and between the organisation and the wider environment; humble, vulnerable practice of timely action inquiry
6	Strategist Aware of paradox and contradiction; process AND goal oriented	Collaborative Inquiry Open, shared reflection about organisation mission; creative solutions to paradoxes and values differences
5	Individualist Self-curious; aware that how one sees the world impacts how they experience the world	Social Network Strategic or mission-focussed alliances; strong value on maintaining distinctive traditions and being financially viable
4	Achiever Longer term goals; open to feedback; appreciates complexity	Systematic Productivity Focus on viability and marketability of products or services; standards, structures, and roles seen as way to get results
3	Expert Interested in problem solving; seeks continuous improvement	Experiments Tries out different administrative, production, technology, reward, financial, and marketing strategies to find the
2	Diplomat Observes protocol; avoids inner and outer conflict; conforms to group norms	Incorporation Products and services produced; goals and staff chosen; task and roles delineated
1	Opportunist Short-term focus; can be manipulative; rejects feedback	Investments Commitment to creating organisation and connect with future stakeholders and peer networks, after the Conception stage.

Source: Fisher, Rooke & Torbert (2003)

4. Assessing the Stages of Development

Measuring someone's complexity of thinking is in itself a complex process. Likewise, creating valid and reliable ways of measuring a person's current stage of development can be a challenge. This not to say, however, that it is possible and what follows are two reliable and valid methods.

Robert Kegan and Lisa Lahey (1994) developed Subject-Object Interviews, which involve intensive interviews by a psychologist, to determine a person's "order of consciousness", on the developmental scale that Kegan developed. The content of the messages in the interview are analysed in order to determine the stage of a person's development.

Jane Loevinger (1992) developed the Washington University Sentence Completion Test (WUSCT), a sentence completion form. Sentence completion forms are commonly used by psychologists, to measure various aspects of personality. Loevinger's goal was to measure the stages of what she called "ego development". The WUSCT has since been updated by Harthill Consulting and Suzanne Cook-Greuter, and renamed the Leadership Development Profile.

For team or organisational stage development, McGuire & Rhodes (2009) of the Center for Creative Leadership (CCL) (www.ccl.org) have created a model of team leadership cultures, built upon the Action Logics of Torbert. They have condensed the seven action logics (see Table 1 supra) into three levels of what they call "Leadership Logics" for teams and organizations. They are as follows:

1. Dependent-Conformer (includes the Opportunist, Diplomat, and Expert Action Logics). In this stage people create a social system where colleagues rely on each other to understand and construct reality.

2. Independent-Achiever (includes the Achiever and Individualist Action Logics) In this stage people are driven for results, are independent thinkers, and are highly adaptive to the environment.

3. Interdependent-Collaborator (includes the Strategist and Alchemist Action Logics) At this stage the culture is such that people are able to be transformers, even in the midst of change and uncertainty. They are able to create win/win scenarios across complex

systems.

These Leadership Logics can now be assessed with an instrument called the Leadership Culture Survey (LCS). The LCS measures the cultural dimension of the stages, and helps teams and organisations explore whether their culture is aligned with the type of developmental stage they aspire to create for short and long-term effectiveness.

5. Criticisms of Developmental Theory

There are two main criticisms of developmental theory:

- One is that it can be considered as elitist, because later stages are considered "better", and this can make people judgemental. However, while operating at a later developmental stage is helpful in some contexts, there are many more competencies that go into being an effective organisation and leader. Being at a later stage does not mean a person is a better human being, just that they have a more sophisticated sense-making system. And effective leaders are only required to operate at a stage that matches the complexity of the environment they are working in, so later stages may not always be necessary.

- A second criticism is the difficulty and/or expense of assessing someone's stage of development. Assessments cost hundreds and dollars and so are not accessible for many people. However, maps can be useful, even if they are imperfect and even if a person is not 100% sure of where they are. Or to adapt an old saying "Tell someone to keep moving ahead, and they may get lost. Give a person a map of the territory, and they at least know where they are going." The author has facilitated many workshops where there is people only do a self-assessment of their stages, and the impact has still been transformational. Many people get excited when they understand this fairly new view of the terrain of development.

Conclusion

Albert Einstein once said that "the significant problems we face cannot be solved at the same level of thinking we were at when we created them." If this is true, then purposefully transforming ourselves to later action and leadership logics (or using any other model of developmental psychology)

will be useful for being effective in the future.

By presenting a developmental roadmap as part of individual and organization development, we can decrease the chances of the people getting caught “in over their head” and increase the possibilities they can manage a world on increasing complexity, diversity, and uncertainty.

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