

# *IR's Occasional Newsletter*

## #7 – July 2009

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### ***Announcements:***

#### ***Journal of Integral Theory and Practice***

The [\*Journal of Integral Theory and Practice\*](#) (JITP) has published its summer issue. Authors explore online education, sexual identity, international development, gender and the integral community, and more. Our best-selling issue on Integral Coaching, guest edited by Joanne Hunt of Integral Coaching Canada, is also still available. Visit the [Integral Life store](#) for information on how to subscribe or to obtain individual issues.

JITP is the official academic journal of the Integral Institute. Scholars from a wide variety of backgrounds contribute articles, case studies, reflective pieces, empirical studies, and critical views. JITP is committed to the refinement, development, and expansion of Integral Theory.

#### ***Integral Education Seminar***

There is still room left in the Next Step Integral's Integral Education Seminar August 2-7 near Seattle (<http://i-edu.org/>). IR Editors Jonathan Reams and Tom Murray have been involved in prior years IE Seminars, and speak highly of them as a places to learn, network, and build community around topics of "integral education" in its broadest sense. The venue, held at a remarkably beautiful retreat center on Whidbey Island, will give participants opportunities to interact with Susanne Cook-Greuter, Terri O'Fallon, Terry Patten, Craig Hamilton, John T. Kesler, and other leaders.

#### ***Integral Leadership for Sustainable Evolution***

**Important UPDATE:** Now welcoming all ages :-)

Let's go in deep!

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\* The seminar for emerging leaders and change makers all over the globe!  
# 4-9 August 2009, Venwoude, the Netherlands!  
€695,- / €795 ALL-IN: 6 days organic food and lodging, and training fee.

Our PURPOSE for this event is to **assist emerging leaders and change agents worldwide** (consultants, politicians, artists, bankers, students, entrepreneurs, etc) with **taking the next step in offering their contribution to a sustainable evolution on our planet.**

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--> For questions and tips contact [Anouk@experienceintegral.org](mailto:Anouk@experienceintegral.org).

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## *Correspondence*

### **Public Letter in Response to Z. Stein and K. Heikkinen's**

**June 2009 *Integral Review* article (V5, N1, p. 3-24)**

**"Models, Metrics and Measurement in Developmental Psychology"**

by William R. Torbert, Professor Emeritus, Boston College

Sent initially to the *Integral Review Newsletter*, Z. Stein, K. Heikkinen, S. Ross, J. Reams, and other scholar/practitioners whom I think of as having a direct interest in the LDP instrument: S. Cook-Greuter, D. Rooke, E. Herdman-Barker, R. Livne-Tarandach, A. Nicolaidis, D. McCallum SJ, H. Bradbury, B. Morrill, J. Sabbage, S. Taylor, K. Merron, J. Hartwell, K. Yeyinman, G. Young, N. Wallis, C. Palus, J. McGuire, E. Kelly, J. Rudolph, P. Foster, M. Krot, PCT ...

I welcome the intent of Zachary Stein's and Katie Heikkinen's June 09 *Integral Review* article: To generate further sharing of quality control information in regard to the development of usable knowledge in the field of developmental psychology.

Having myself vowed to write nothing more 'academic' starting in 2009, I limit myself to this informal letter referring briefly to a few historical and more recent types of reliability and validity testing conducted on the Leadership Development Profile (LDP), with references, in an attempt to invite further written work on these matters, but never again by me.

I also want to take this opportunity to invite Zak and Katie, as well as any of you with a continuing scholarly and practical interest in the LDP who hear about this invitation in time, to join me at my home for a day of study of the extant LDP-reliability-and-validity literature and of the continuing challenges, as I pass on whatever I can of this work to others of you...

(the time and place, more specifically, is 138 Parker St, Newton MA, 11am-5pm, Saturday October 3, with a good drinking/eating/music/dancing party afterwards

for those who so wish [I'll try to get one of my sons to play his guitar and I'll get Pacey Foster to d-j]. Let me know if you're answering 'Yes.'

On the academic-writing front, it's up to any of you who are so motivated to pursue these matters after this and after the Oct 3 work/party (tho I will be more than happy to provide leads and materials if I can, as well as to speak by phone). Please let me know if that Oct 3 date seems attractive; those of us coming can design it together.

Turning to Stein's and Heikkinen's overall discussion of models, metrics, and measures, it seems to me excellent as far as it goes... **but** in my view stops short of some of the critical validity and practical/ethical issues of the human sciences, as I will suggest below toward the end.

In addition, while you two authors are commendably clear about the limits of your exploratory empirical study of the validity of certain specific developmental measures, it turns out that, at least from the point of view of my now-completed scholarly career, your methodological limits have resulted in a profoundly inaccurate portrayal of the validity-testing-history-and-published-literature in regard to the Leadership Development Profile (LDP)...

(While at the same time confirming your very own new measure you've recently begun developing as best of all...).

(The alternative hypothesis should certainly also be conceivable to a professional social scientist: at its most personally provocative, as I guess you'd expect a 180-degree-opposite alternative hypothesis to be, the alternative hypothesis = that *my scholarly career would best be left in deep shadow* for at least a while longer, maybe always, in the scholarly/academic world of leadership, organizational transformation, integral-quant-qual-&-action-methodologies, etc.).

At the same time, there is no doubt that the validity testing background of the LDP has long grown slowly in deep shadow, not widely recognized in the psychometric, psychological, sociological, political science, or leadership-studies literatures (an exception is McCauley et. al., 2006)... So this is a great last opportunity for me to bring additional attention to this body of work.

Based on your way of reviewing data, you – Z & K – found no Leadership Development Profile (LDP) validity studies. In a footnote, you state that although some LDP-based studies [e.g. Rooke & Torbert, 1998] cite Loevinger's studies as confirmation of the LDP's reliability and validity, "Loevinger's studies are out of date [new raters, scoring criteria, and levels are now used; metrics need to be re-calibrated], so they are not included here."

Thus, in a reversal of the story of 'The Emperor With No Clothes,' the review apparently discredits the Leadership Development Profile (LDP) measure as 'all public costume' and 'no scientific body underneath' (and many readers are likely to take that as gospel & inquire no more).

As I reflect on this matter, I find it both *surprising* and *unsurprising* that you found no validity studies of the LDP... Given the way you searched...

It seems *surprising* in that at least one of you – the tall one – attended a conference session last summer at which I and several colleagues presented a prize-winning paper on a wide variety of validity-testing studies on the LDP, which in turn referred to my most recently published book (*Action Inquiry*, Berrett-Koehler, 2004), which contains an 18-page appendix on the history of the LDP, with references to a number of quantitative studies using, and testing particularly the external validity of, the LDP. (It almost seems, Z, as though you reacted to something about that event that made you counter-dependently ant-agon-istic...???)

External (field, catalytic) validity is arguably least demonstrated by other developmental measures heretofore and is arguably the crowning validity consideration, as well as the most relevant to the practical ethics of using the measure responsibly in the worlds of practice (see brief examples below).

In regard to *Action Inquiry*, it is also noteworthy that the first listed associate author of the book is Dr. Susanne Cook-Greuter, a research scholar with whom I collaborated directly for 25 years and whom the authors properly credit with validity testing (Cook-Greuter, 1999) on what is now a somewhat distinct version of the measure (her SCTi / MAP)... but which was, at that time, the same measure. Hence, your article does in fact cite some validity-testing evidence in favor of the LDP without realizing it does so. Moreover, the validity testing work on the LDP has now extended since 1980, so your assumption – Z and K – that the validity tests of the Loevinger form conducted in the 1970s and 80s are irrelevant to the LDP proves false. Our own early validity testing (e.g. Merron, Fisher & Torbert, 1987; Torbert, 1987) was done at that very time based on the Loevinger form validated at that time (see further qualifications below). Thus, your dismissal of the ‘old’ Loevinger-related reliability and validity evidence is unjustified, since we were conducting field/catalytic/external validity data at the time, ‘tho o’ course u wrn’t f’Il’w’ng th’ action @ th time. In fact, despite all the changes among the original and revised WUSCT, the SCTi / MAP and the Harthill LDP, I bet they would show a beyond .80 correlation with one another.

As we can already see, the situation in the field may not be immediately transparent to new entrants... So, there are several reasons why it seems *unsurprising* to me that you two found no validity studies of the LDP, given the way you were consciously looking (i.e., in 3<sup>rd</sup>-person terms, ‘given their empirical methodology’)... And why this is therefore a useful opportunity to respond to your own repeated and praiseworthy invitation to make this information more widely available for study to other scholars:

First, although Susanne Cook-Greuter and I began working in tandem some thirty years ago to apply and re-craft Loevinger’s sentence completion form (also called WUSCT, of which SC-G is a high-reliability senior scorer) to issues of management and leadership... The measure itself was not renamed the LDP until some 20 years later...

(Our delay was mostly based, I believe, on our collective humility in relation to Loevinger's achievement (even tho' many of us viewed it as slightly less than the contributions of Plato/Hegel/Marx/Kierkegaard/Freud/Jung/Piaget/Erikson/ Kohlberg/Gilligan (my favorite dance-partner-when-twirling-on-Appian-Way)/Wilber/Kegan, et al.)

A second reason why it is *unsurprising* that you missed relevant validity studies of the LDP is that most of our early tests were parts of studies conducted on the external/field/catalytic validity of the measure (based on the relatively well-established internal validity and reliability findings at that time). Thus, they appeared in peer-reviewed journal articles, book chapters, and books about substantive findings from catalytic/field experiments... and not in articles focused primarily on the psychometric properties of the metric itself (e.g. Fisher & Torbert, 1991; Rooke & Torbert, 1998; Torbert, 1987; 1991; 1994; Torbert & Fisher, 1992). Someone(s) may yet author a *JAP* or *JPSP* or other psychometric journal article on all this...

(My current hope/bet is on a collaboration between two doctoral students, among the recipients of this communication, who have yet to meet each other thru any medium so far as I am aware [and who, as young mothers at least, with strong connections to Asia Minor, have much in common]... but many other successful collaborations amongst others of you receiving this note are also easily conceivable...)

A scattershot outline of some of the studies and findings related to the LDP include (and I am phrasing each summary in as different language from the first publication as possible, so that comparing the original report to this one will reveal the most additional information possible):

- 1) An n=281 field study (Torbert, 1994), during which all participants were invited to request feedback on the LDP measure's findings about them, if they so wished. A larger proportion at each later developmental action-logic asked for feedback, a perfect 1.0 correlation on a Spearman Rank Order test, assuming the theoretical prediction that later, post-conventional-&-inter-dependent action-logics are increasingly open to (and increasingly seek out) single-, double-, and triple-loop feedback and learning. Understood this way, the finding supports both construct & external validity).
- 2) An n=96 (in 16 task-teams) field study (Torbert, 1987) shows that those teams (5 of 16) with one or more members measured at Strategist (8) outperformed teams with no one measured Strategist in three ways: in terms of bottom-line effectiveness, and in terms of members' perceptions of efficient time-use and greater within-group support for own learning.
- 3) In an n=177 field experiment over 22-months (Torbert & Fisher, 1992), only 3 of the 177 organizational participants who enacted the many developmental instructional technologies embedded in the organization's regular functioning (which included rotating team leadership roles, 360 assessments, developmental coaching, etc.) during their first 11 months transformed a full developmental action-logic after the full 22 months, according to the LDP. **By contrast, 15 out of 16** of those organizational participants **who** did all the above **and also volunteered for and won** a non-remunerative consulting role with new teams, during their 2nd 11-month participation (including depth-clinical training and processing on a weekly basis), **did transform**

**a full developmental action-logic.** This finding accounts for an unusually high proportion of the variance (81%, Goodman & Kruskal's tau) of the participants in the field experiment who are measured as having experienced a transformation of action-logic. The results seem a good test of the test-re-test reliability of the instrument, since only about 10% of the sample changed its score. The overall results also seem to document the transformational efficacy of a late-action-logic type of organizing ('liberating disciplines' [Torbert, 1991]) that interweaves voluntary commitment, depth mutual inquiry practices, and the practical demands of real business clients... with the intent of generating adult development.

- 4) In an LDP study of 10 CEOs and their Lead Consultants in 10 organizations attempting to transform (Rooke & Torbert, 1998), only the five CEOs measured at the Strategist (8) action-logic reliably succeeded in generating organizational transformation (accounting for .42 of the variance at a .05 level, Spearman Rank Order test).

In this case, of the four Lead Consultants, three are measured at the Strategist action-logic, one at Alchemist. As theoretically-predicted, in the five cases when the CEO is measured as at an earlier-than-Strategist action-logic, only the consultant measured at the Alchemist action-logic succeeds in supporting the two organizations that nevertheless succeeded in transforming. The 2 non-Strategist CEOs matched with Strategist Lead Consultants made some money but no sustained transformational change in the two organizations they were involved with. And, in the case of the Diplomat CEO [the earliest-recorded action-logic], who was paired with the Alchemist action-logic Lead Consultant, the consultant resigned after the CEO and Board Chair chose **not** to act on the consultant's recommendation that the CEO resign or be fired; 6 months later an ethics crisis that the Lead Consultant had known was brewing led to the firing of the CEO; the organization regressed two action-logics (as understood thru the Developmental Action Inquiry approach, an organization makes semi-permanent regressions easily, whereas an embodied person regresses only temporarily (and for shorter amounts of time the later the action-logic (McCallum, 2008).

Thus, if one adds the LDP scores of each CEO/Lead Consultant duo, then the combined influence of their action-logics accounts for 59% of the variance (at a .01 level, on that same Spearman Rank Order test) in whether the organization succeeds in transforming. The small sample size and the non-parametric statistical test highlight the construct and external validity of the measure as a metric that properly distinguishes among individual cases. I know of no evidence that any other developmental measure has tested or attained this kind of field/catalytic/external validity and would actually examine any such purported evidence carefully (see appendix of Torbert & Associates, 2004), perhaps surprisingly, given my vow not to write about these matters in a systematic academic sense again, but not inconsistently.

- 5) A more recent example of testing the construct validity of the current version of the LDP, entailing an n of 891 LDPs (830 [93.1%] scored as 'Conventional'; 61 [6.9%] as 'Post-Conventional' [Livne-Tarandach & W. Torbert, 2008]) found two qualitatively different factor analysis structures between the two sub-samples, as the theory would predict: the Conventional sub-sample shows eight *distinct* factors, with different stems clustering in different factors; by contrast, the Post-Conventional sub-sample shows 11 *interwoven* factors (we are informally calling it the 'spaghetti-and-meatballs' graph), with more than half (52%) of the stems loading on two factors or more (9 on 2, 7 on 3, and 3 on 4).

These findings, we propose, suggest that – while Conventional group stems in stable themes (e.g. ‘leadership,’ ‘feminine,’ ‘power,’ ‘rules,’ ‘feelings,’ or ‘family’) or larger stable categories (e.g. ‘work’ or ‘emotions’) – Post-Conventionals, by contrast, tend to link different stems together at one time or another, “flocking” differently at different moments. These two, very distinct types of thinking remind us of Plato’s two images of the nature of thought (in his *Thaetetus*): as either ‘marks on the wax tablet’ of the mind, or as ‘birds flying about in the aviary’ of the mind. Put differently, Conventional’s loadings represent a relatively simple mental map, with Aristotelean-ly distinct, independent categories (“nothing can be both A and not-A”); in contrast, Post-Conventionals’ loadings suggest an ongoingly-dynamic, mutual-systems-oriented, inter-independent, ‘living’ mental mapping process, more at home in contemplation of Plato’s dialogues..

Overall, the strength of the external validity testing of the LDP is that a range of different kinds of studies

(lab and field experiments, field surveys, interview studies anchored by LDP scores, and real-time-studies-directly-implicating-the-researchers-and-their-clients themselves [see e.g. McGuire, Pallus & Torbert, 2007, or Hartwell & Torbert, 1997a & b])

find consistent theoretically predicted and theoretically explainable results and sometimes account for an unusually high percentage of the variance in the process. More recent validity and reliability are available in Torbert et al (2008).

This note has become too long, but I also want to bring to your attention a third reason that I believe helps to account for a mismatch between where and how Stein and Heikennen looked for LDP validity tests and where and how such validity tests have actually appeared in the scholarly literature. This is that, in part by using the developmental ‘paradigm of paradigms,’ I have also, with my closest colleagues and friends, been attempting to embody a late-action-logic paradigm of social science in my work. This Developmental Action Inquiry paradigm (Torbert, 2000a and 2000b) makes, not only the ‘language’ turn, but also the ‘action’ turn (Reason and Torbert, 2001; Chandler & Torbert, 2003) into studying oneself (1<sup>st</sup>-person research) in action with others at their invitation (2<sup>nd</sup>-person research) in relation to broader 3<sup>rd</sup>-person organizations and 3<sup>rd</sup>-person empirical measures.

As part of making this possible, Cook-Greuter and I (along with David Rooke and Jackie Keeley of Harthill Consulting Ltd.UK and eventually others, such as Elaine Herdman-Barker) radically improved the measure’s face validity (or 2<sup>nd</sup>-person validity) for working people in general receiving feedback on their performance on the measure (and for legally-oriented human resources departments that didn’t like being challenged by employees about the peculiarly-gendered stems in the Loevinger instrument). We did so by substituting four independently-validated work-related stems which have proved to have higher item/profile correlations than the earlier Loevinger stems substituted out (thus improving internal reliability overall). We also improved face/2<sup>nd</sup>-person validity by translating a lot of Loevinger’s titles and evaluative terms to more neutral/descriptive terms (e.g. ‘Conformist’ to ‘Diplomat’ [formerly 3, now 4 in the common numbering system]). We also developed the theoretical rationale and

work-related description of the Technician/Expert action-logic, which was the modal score among all our managerial samples (and was then an unnamed ¾ transition; now 5 in the common-numbering system). Later, we did the same for the Individualist/Pluralist [7] action-logic. All of these changes have been critical for the possibility of using the measure effectively and ethically in action research with co-participants in field settings, such as the research at the 10 companies summarized above.

Of course, validity testing of various kinds needs to, and is, continuing on the LDP. But I hope that the foregoing comments, as unsystematic as they are, arouse a new kind of interest in this particular measure, as well as in the broader issue of transforming the social sciences from pallid versions of the old-fashioned physical sciences that exercise ethically-objectionable unilateral power over subjects... into ethical forms of action research that empower co-participants and generate new forms of mutual and transforming power.

**References** (many of which can be found at the Boston College Faculty e-scholarship site, which is click-able from [williamrtorbert.com](http://williamrtorbert.com))

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## **Reply from Zak Stein**

**RE: Reply to Torbert and frame-up for *Integral Review* readers.**

My paper (with Katie Heikkinen.) in the current issue of *Integral Review* is, in part, a call for discourse and collaboration between researchers in developmental psychology concerning the validity and reliability of the metrics they use. Bill Torbert has been the first to respond to this call, and we are grateful for his thorough and insightful response, in particular his discussion of ecological validity. We hope his letter will not be the last and that others might take the peer-reviewed route, choosing to publish a more formal article in *Integral Review*. Nevertheless, the content of Bill's response is exactly the kind of thing we are looking for.

The story we tell in our paper is incomplete—as we note explicitly—and we offer it as simply the first word in a longer conversation, the goal of which is to inform a kind of information clearinghouse and educative resource about the wide variety of developmental approaches available (more on this below).

We will address the details of Torbert's response (and the responses of others) in a second publication to be written over the coming months. For now I will say, in passing, that developmental metrics can be divided into those *calibrated* for use in assessing individuals and those that have not been, and thus can only claim to be useful for research purposes. This is a distinction we explain in the paper, where we discuss the fact, for example, that Loevinger claimed that her metric was not reliable enough to be used in assessing individuals. The studies Torbert describes, although they provide evidence that developmental level predicts leader behavior—very important—provide no insight into whether or not the LDP is statistically reliable enough to justify its use in individual assessment.

When it comes to individual assessment, statistical reliability is a central concern, because it tells us how confident we can be that the score awarded to a performance is close to the test-taker's "true" score. For example, if a developmental assessment that is designed to measure 7 levels has a statistical reliability of .80, an individual who receives a score of 5 has a *true* score of 5, + or - 2 levels—somewhere between 3, and 7. The ideal statistical reliability for an instrument designed to detect 7 levels is .96. Even then, an individual who receives a score of 5 could have a true score between 4 and 6. (A research *instrument* with a reliability of .80 is good enough for studying group trends, but *assessments* are generally required to have reliabilities of .90+).

Of course, all assessments should measure (1) what they claim to measure (construct validity) and (2) something of importance (ecological validity), and human-scored assessments should also be associated with appropriate levels of inter-rater reliability, which must be continuously re-evaluated.

So this is the kind of difficult conversation we are trying to have—both technically/conceptually difficult and politically/emotionally difficult. The rest of this letter is an attempt to clarify why this conversation is important to have right now—why it is worth having despite its difficulty. I offer the following thoughts in order to clarify, as I did in *Integral Leadership Review*, the broader context that has me worried enough to take on the role of *l' enfant terrible*.

The United States has one of the largest and most complex educational systems in the world. This is a system that began to take in its current shape after the Second World War, influenced by a confluence of factors, including the birth of psychological testing. We now face a complex polycentric testing infrastructure that affects the lives of millions of children, adolescents, and adults every year. The sheer size and importance of this infrastructure makes it an unprecedented and incomparable example of applied psychology. But it is run by private companies providing a product that serves an irreplaceable public function in the educational system, which has led many to posit the specter of a *standardized testing industrial complex*. Moreover, the type, quality, and purposes of existing tests are highly

questionable. They are not built by developmentalists or learning scientists; they can function only as sorting mechanisms for allocating rewards or punishments; they set drastic constraints pedagogical options; and they are administered in high-stakes contexts, etc. And this testing infrastructure is continuing to grow.

The rapidly increasing complexity of our world has forced the educational system to expand vertically, where it has diversified greatly. The task demands of key roles in society are becoming increasingly steep, requiring life long learning, either in graduate school, through various professional development mechanisms, or through coaching/therapy, etc. In post-industrial economies, individuals must be educated longer and to higher levels, and some, depending on their role, can never stop learning. This new educational frontier is accompanied by a burgeoning testing infrastructure. Diverse applications of psychological testing are proliferating, serving a wide variety functions.

This emerging arena for applied psychology could begin to look a lot like the testing infrastructure that dominates the world of schooling. It has not yet become legally and institutionally entrenched, but it will. Accountability mechanisms will be extended to higher education. Industry and government will be forced by a host of global problems to see that all organizations need to build in sophisticated mechanisms for life-long learning and social role allocation.

In this light, the call for quality control becomes clear, I hope, as does the need for rigorous discussions about psychometrics. We need to be at least as rigorous—if not more rigorous—than the existing psychological testing juggernauts, if we are going to have any say in shaping the large scale application of psychological technologies.

I am leading specific efforts (along with Theo Dawson) at Harvard and elsewhere to re-design the testing infrastructure for the public education system. We are piloting new developmental testing infrastructures in a network of research school collaborations and working to stimulate discussion about testing in the public sphere (I invite you to participate in this initiative by taking The National Testing Survey at: [www.testingsurvey.us](http://www.testingsurvey.us)).

My efforts in the field of adult development have been focused toward the Integral community (broadly defined), wherein there is a profound call for innovation in applied developmental psychology. My efforts have been mainly discursive so far. But the series of publications I have offered on this topic have consistently called for action. I am currently taking steps—with Katie Heikkinen, Sara Ross, Robb Smith and support from a network of academics, consultants, and psychologists—to build an information clearinghouse and educational resource about developmental approaches. This will be a website designed to foster collaboration and transparency between researchers, between researchers and the consultants (etc.) who buy their wares, and between researchers, consultants, and the public. The information will focus on reliability, validity, and the ethics of application. This project will take shape over the next 9 months, and I'll keep you posted via *Integral Review*.

As Dewey, Habermas, and Wilber have warned: non-synchronic patterns in socio-cultural development have resulted in a situation where our techno-scientific capabilities far outstrip our ethico-political visions and organization—21st century tools are wielded in light of 19th century (and in some cases 14th Century) ideology and government. This is a precarious situation. From where I sit—as a philosopher of education—this situation demands that we roll out the right kinds of psychological and educational technologies ASAP. We have a precious and fleeting chance to collectively build certain specific

structures that will shape the future; responsibility is paramount—as is a vision of what is possible and preferable.

All the best wishes from the pre-dawn hours in Carlisle, Massachusetts.

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## *IR Editors News*

**Thomas Jordan**

### **Grant for 3-year research project on The Integral Process for Complex Issues**

Last December, we received the good news that a research grant application to the Swedish Knowledge Foundation for a 3-year project was approved, with a budget of about 500 thousand USD. The project title is From concerned citizens to effective societal entrepreneurs – Cognitive transformations and the role of scaffolding. Pia Andersson, now doctoral student at the Department of Work Science will carry out most of the work in the project. Dr. Thomas Jordan is the project leader, with dr. Ylva Mühlenbock and dr. Päivi Turunen as part-time co-researchers. Dr. Sara Ross, who developed TIP – The Integral Process for Complex Issues, will act as an advisor to the project. We will use TIP as the main instrument of investigation. The official description of the project is appended below.

The context of our project is societal entrepreneurs working with initiatives that involve a considerable degree of complexity and therefore difficulties in (1) understanding and managing complex processes; and (2) communicating productively with actors with different mindsets. A significant thematic concerns the challenges of working in multicultural settings.

The more research-oriented purpose of the project is to analyze the cognitive changes involved when people start to experience themselves as potentially competent societal entrepreneurs and when they develop skills in societal entrepreneurship. The more praxis-oriented purpose is to contribute to the development of methods (scaffolding modules) that facilitate skill- and confidence-building among prospective societal entrepreneurs. These general purposes are operationalized in seven specific research questions.

Our analytical framework is mainly based on adult development theory, using both qualitative and quantitative data. The main part of our project uses action research methodology, i.e. we as researchers-practitioners participate actively in co-facilitating inquiry and strategy-finding processes together with prospective societal entrepreneurs.

In the main study, we will collaborate with Hyresgästföreningen, the Swedish tenant's association. Hyresgästföreningen has recently initiated a three-year project ("Uppdrag M") focussing on the renewal of the "million programme" housing areas, the large suburbs built in the late 1960's and 1970's when Sweden went through a massive urbanization process. About a million flats were constructed in this national programme with mass production techniques, leading to areas with stereotypical high-rise

blocks. Hyresgästföreningen is keen on mobilizing and involving tenants in the renewal of these areas. A smaller part of the project uses a best-practice approach. We will, with the assistance of the the crime prevention council in Göteborg, identify five successful examples of societal entrepreneurship and use semi-structured interviews to generate data that will be analysed for patterns of cognitive change. The project design will generate different sets of empirical data. Participative observation, documented through journaling, will be a rich and open-ended source of qualitative data on process issues. Semi-structured interviews with process participants will be used in order to analyse whether significant transformations of the participants' constructions of various aspects of societal entrepreneurship occurred. Pre and post questionnaire assessments will generate quantifiable data on the perspectives and assumptions of the participants before and after the intervention.

The research team comprises five researchers from the disciplines of work science, public administration, social work, adult development psychology and conflict analysis. Three universities are involved: the Gothenburg, Dalarna and Antioch (USA) universities. For more info contact:

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### ***Tom Murray***

Putting global warming aside for a moment (as if I could), I'm feeling grateful to have been born in this age of technological advancements. I ordered a DVD with the full set of audio recordings of presentations from the 2008 Integral Theory Conference, dropped it onto my iPod, and have been working my way through the whole conference in the last six months (in my car). Thanks to the prodigious efforts of the conference organizers, I can now attend multiple parallel sessions!

I have particularly enjoyed listening to the panels--lively discussions on integral approaches to subjects including Developmental Research, Environmentalism, Coaching, Education, Feminism, Politics, Psychotherapy, and Spirituality. These panel discussions are wonderful examples of the power of dialog and collectivity in knowledge building. Through the dynamic forces of interaction a quality of breadth, depth, diversity, and wisdom emerges from the whole that would hardly be possible from a single author or speaker, or from a non-interactive format. And it was hopeful to observe that the participants in these panels often exhibited characteristics of an "integral consciousness" such as: reflecting to their present internal physiological/emotional state, speaking to vulnerable elements of their psyche such as shadow, holding moments of silence with appreciation rather than awkwardness, and gracefully responding to alternative perspectives. It was not 100% so superlative, but compared to panels in other academic conferences, these were quite refreshing.

The panel on Integral Education was one of the things that inspired me to write the recently published IR article "What is the Integral in Integral Education? From Progressive Pedagogy to Integral Pedagogy," which allowed me to apply my understanding of integral theory, developed mostly over the last six years, to my decades-long work applying educational theories.

I continue to work on topics of dialog and collective processes, and enjoyed putting together a reference document "Tools for Dealing with Uncertainty, Ambiguity, and Paradox: Reflective Methods for Group Development" for a workshop I co-lead with Sara Ross and Jan Inglis at the National Conference on

Dialog and Deliberation. I'm also looking forward to participating this summer in both a New Generation Integral Activism retreat, and Next Step Integral's Integral Education Seminar, where at both venues I will be prototyping an activity to help participants gain a embodied felt sense of developmental levels as described in Spiral Dynamics and other theories.

### **Bonnitta Roy**

I am looking forward to hosting the 2009 Integral Activism Strategic Vision Retreat at 'Alderlore' - our Connecticut farm/ home July 17th- 21st. This will allow me to develop a close and personal view of how activists are bringing forth integral ideas and putting them into practice. The retreat will be a small intergenerational gathering of people who are activists in grassroots organizing, social movement history, integral theory, whole systems thinking, nonviolent social change, anti-oppression, spiritual practices and community building. The retreat is being organized by Joshua Gorman (Generation Waking-Up) and Julia Walsh (Synthesis Rising) – two young leaders on the rise in the integral community.

Since January I have been working hard to post content on a new venture 'Integral Review of Books' to be hosted at [integralreviewofbooks.com](http://integralreviewofbooks.com). Designed after the kind of extended-article reviews in The New York Review of Books, I hope to build a resource for contemporary works on or operating from an integral view – over the very diverse range of what "integral" signifies. The website is currently not active, but I have been writing an extended article about scalar relations and human action at the associated blog <http://integralreviewofbooks.wordpress.com>.

### **Russ Volckmann**

**Integral Leadership Review** and **LeadingDigest** now have a home. In collaboration with Keith Bellamy and Sara Nora Ross we have incorporated Integral Publishers. At present we will be publishing two new lines: books and dissertations. We seek to provide a means for the voices of integrally informed authors to be heard more widely. Our draft of our purpose statement reads:

Integral Publishers is a 21st Century Enterprise whose fundamental purpose is to contribute to the common good. This will be achieved through the use of technology to foster dialogue and dissemination of integrally-informed ideas, concepts and experiences that enhance the development of individuals, organizations, societies and the planet as a whole.

IP is an attractor for all ideas that marry the wisdom of the past to the potential of the future. We give voice through traditional and emerging channels of communication to talent that speaks to all levels of development and to the beauty that each level brings. Our primary objective is to build an appreciation of humanity, society and world systems and to encourage them to thrive.

We will have a website soon. In the meanwhile, information on our publications can be found at <http://www.integralleadershippreview.com/integral-publishers-bookstore.php>. We now have six books:

- Volumes 1-3, **Insights on Leadership**
- Robert Rabbin, **A Mystic in Corporate America**
- Peter Merry, **Evolutionary Leadership**
- Jordan MacLeod, **New Currency**

Out first dissertation should be ready soon:

- Sara Nora Ross, ***Effects of a Structured Public Issues Discourse Method on the Complexity of Citizens' Reasoning and Local Political Development***

Other books and dissertations are in the pipeline.

We have unusual contracting arrangements with authors that provide considerably higher proportions of royalties to the authors than has been the custom in the publishing industry. We believe authors should be rewarded for their work.

An innovation (for us) on the ***Integral Leadership Review*** website is our streaming audio interviews with individuals like Jim Garrison, Michael Ben-Eli, Barbara Marx Hubbard and Don Beck. You can access these at <http://www.integralleadershipreview.com/mp3-interviews.php>.

On another note, I am serving on dissertation committees of PhD students drawing on integral theory at Antioch University, California Institute of Integral Studies, Fielding Graduate Institute, Institute for Transpersonal Psychology and Saybrook Institute. This year I am teaching about integral leadership at California Institute for Integral Studies, Saybrook Institute and Union Institute and University. Sara Nora Ross is joining me for the opening session with UI&U students in July.