

# Articles from Integral Leadership Review

## Notes from the Field: A Gathering of Developmentalists

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The day was a bit misty, but despite the rain sixteen interested developmentalists from around the world rang the doorbell next to Bill Torbert's front door on October 3rd, 2009 to engage in a dialogue on developmental theory and its measurement. This meeting was sparked by an article in the Integral Review, "Models, Metrics, and Measurement in Developmental Psychology" written by Zak Stein and Katie Heikkinen. The Abstract to their article began and ended with:

Developmental psychology is currently used to measure psychological phenomena and by some, to re-design communities. While we generally support these uses, we are concerned about quality control standards guiding the production of usable knowledge in the discipline...We reveal a conspicuous lack of psychometric rigor on the part of some of the most popular developmental approaches and invite remedies for this situation.

Highlighted in the article was the Lectical Assessment System, (Dawson et al), the Subject Object Interview (Kegan) The Leadership Development Profile (Torbert et al) Spiral Dynamics (Graves), SCTi MAP (Cook-Greuter), Requisite Organization (Jaques) and the Hierarchical Complexity Scoring System (HCSS; Commons, et al.).

As a response to this critique, Bill Torbert sent an open invitation for anyone interested in exploring the article and developmentalism to a gathering in his home on October 3, 2009. A number of interested people responded but 16 were able to attend as concerned parties. Present were Aliko Nicolaidis, Elizabeth Debold, Jonah Freidman, Karen Yeyinmen, Sandra M. Martinez, David McCallum, Nancy Popp, Zachary Stein, Edward Kelly, Jackie Keeley, Nancy Wallis, Mary Stacey, Katie Heikkinen, Sara Nora Ross, Bill Torbert, and

Terri O'Fallon. Present by a letter offering was Susanne Cook-Greuter. Representatives of The Lectical Assessment System, the Subject Object Interview, the Leadership Developmental Profile, HCSS, and The SCTi MAP (MAP for short) were in attendance.

Early on in the introduction process, in which each person attending described their purpose in being there, Zak Stein put forth his concern that seemed to be a basis for much of the day—that is, his concern that we catalyze an information clearing house to assure ethical use of the developmental technologies that are available for the protection of consumers in a fashion similar to the clearing by the FDA of the bio-tech industry. His assertion was that, to get a holistic picture of somebody we need multiple measures, so it was his hope that there could be more collaboration and transparency between researchers and between researchers and consumers.

Several people supported Zak's concern. In addition, other intentions were revealed: How to access the first and second person perspective in the process of working with these inventories; the shared responsibilities we have as researchers and practitioners coming together; defining our terms so that we can adequately communicate with each other and the public; the "so what" of this process; concern about what it is that we can do to bring about a big shift; how can we work together so that we can all support each other in the development of all of our work and in the process serve consciousness; and an interest in wonder. Many people came to listen and learn.

Early in the conversation we began to unravel the differences between the various measures, including what we mean by the word "cognitive" since some of these approaches were thought of as cognitive approaches. Different definitions were expressed and as the conversation ensued from this exploration we began to untangle some of the differences between the represented inventories.

For example the LAS was described as disentangling the evaluative from the descriptive before they put them back together, whereas the MAP, the LDP, and the SOI were described as more integrative of the whole from the onset. The LAS was described as measuring performances on various lines of development, whereas the SOI, MAP and LDP were described more as a measure of a whole person relative to the particular focus of their scale. It was noted that two distinct language games are involved here: one about the quality of the empirical claims and another about how you justify the evaluations you are making of each person that are about their quality as a person.

Thus, it became clear early on that the purpose behind the use of a particular developmental inventory was of importance. An observation was made that one purpose seems to be to create a generalizable and justifiable third person measure (the LAS). Others seemed to be concerned with the understanding of the insides of a person's experience (SOI). So does the (MAP) while it also looks at behaviors and cognitive complexity. A further

focus was concerned with the form of development that actually comes out in action (Action Inquiry in conjunction with the LDP).

Time was set aside for those present representing the LAS, the SOI, the LDP and the MAP to further describe their approaches to measuring development. Out of this discussion, one fundamental difference seemed to surface: The LAS and HCSS are not based on the concept of a person having a center-of-gravity and the SCTi-MAP, the SOI and the LDP are. Therefore what is measured is essentially different.

A discussion ensued related to validity and reliability measures on several of the scales, large and smaller samples and other interests in the area of metrics, but this focus was held by the concern about appropriate ethics around the use of all developmental frames.

The biotech industry in the concrete world was compared with psychological technologies, which come from the world of the subtle. Because of increased demand to have people who can make decisions within the whirlwind of increased information glut, it was noted that there will be more and more demand for placing people, developmentally, in appropriate positions for making the required evaluations and assessments and decisions. Given this ballooning context it would be important to not let the market place dominate the flow of developmental services because this may be harmful to consumers.

Coming to a focus that we are all fundamentally on the same team—all looking at the same thing from different angles—we grappled with the recommendation that a community of concerned people develop standards to protect the consumer by looking at comparable institutes like ETS and AERA, and their guidelines for standards of best practices, through some form related to a clearing house or network.

It was proposed that a community of developmental academicians, researchers and practitioners come together and articulate principles for this network/clearing house and from that develop a set of standards. Setting up the right container to engender cooperation amongst us all for this effort was recognized. It would also be useful to find ways to catalyze metrics across these scales.

While this seemed to be a good first step, cautions also arose. While clearing houses could screen for ethical best practices that might include metrics, they also screen out certain options, some of which may be appropriate from later developmental levels, thus limiting choices of people, as the FDA does by not approving certain naturopathic approaches.

It was also noted that principles in and of themselves could reify our very efforts to the rigidity that we want to escape, that we might be aware of the importance of having a guiding evolutionary entity that would develop along with development itself. If we are at the frontier of human development,

having developmental theory helps us see how big a challenge this is. Most people think and act in a way that distort principles into their opposites, because they don't get enough feedback.

The day began and ended with a sense of good will, a collaborative air and a promise to meet again with this rare kind of active second person research spawned by Bill Torbert's invitation. . Sara Ross, publisher of the Integral Review invited articles on the day and on the reliability and validity testing of different measures for the December issue of IR.

Our work is just beginning. While the eyes of the world are focused at this time on more prominent areas than developmentalism, we are—by comparison—under the radar. This gives us the flexibility, the freedom, the option, the responsibility to develop something ethical, and creative for ourselves. We can start from the place of shaping ourselves with the kind of developmental level and focus that humanity will one day be holding prominent, so we don't want to repeat the siloing of our clearinghouse predecessors. □ We want to learn from what they weren't able to see and work towards a model that is developmentally later than what we now have. This model will address how will humanity will be looking at what we did in 10, 20, or 100 years and what will we do in the design of our very models to serve humanity by imbedding development in them.

These are my own musings of that day of opening where 15 interested developmentalists made their first contact to engage with cooperation and good will.

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Attendees were:

Bill Torbert—A now retired Dean and professor at Boston College, Bill has authored several books, including co-authoring Action Inquiry. He co-authored a significant article in Harvard Business Review on the relationship between higher stages of development of CEOs and consultants and success in organizational transformation. He has consulted internationally and continues his consulting relationship with Harhill in the United Kingdom. He is a member of the Integral Leadership Council for Integral Leadership Review.

Elizabeth Debold—is a senior editor at EnlightenmentNext and co-author of Mother Daughter Revolution. She holds a Harvard PhD in Human Development and Psychology. She received her doctorate in Human Development and Psychology from Harvard University, and was a founding member of the Harvard Project on Women's Psychology and Girls' Development, which was directed by Dr. Carol Gilligan.

Aliki Nicolaidis—is a post doctoral Research Fellow for the Center for Institutional and Social Change She received her Ph.D. at Teachers College. Previously, she founded not-for-profit enterprises in Singapore to build the

capacity of women in leadership positions in government, non-profit and civil society sectors. She continues her work with emerging civic leaders in the United States and in the Middle East, working with practitioners and scholars in a variety of contexts.

Karen Yeyinmen—is a doctoral student at Harvard Graduate School of Education where she is studying adult transformational learning and leadership development. Her research is heavily informed by constructive-developmental and socio-cultural theoretic perspectives. She was Executive Vice President at TreeTop Technologies, Inc, a Information Services company.

Jonah D. Friedman—

Sandra M. Martinez—teaches at the United States Army War College and the Naval Postgraduate School. She co-authored a paper with Bill Torbert, “Timely Co-Generation and Sharing of Knowledge.” She currently lives and works outside of Tegucigalpa, Honduras.

David McCallum—is serving as assistant to the president of Le Moyne College in Syracuse, N.Y., and as visiting professor of Leadership studies in Le Moyne’s Management Division. In his research, David continues to explore the implications of developmental maturation for leaders as they face the challenges of organizational change processes. In his practice, he is involved with leadership capacity building for boards of trustees, faculties, and other groups. He also provides retreats exploring the implications of adult development for spiritual maturation.

Nancy Popp— is a developmental psychologist specializing in adult development. She did her graduate work in the '80s with Robert Kegan at Harvard and has become one of the foremost experts on the Subject-Object Interview, a measure developed by Kegan and colleagues to assess the complexity of an individual’s meaning-making. She continues to collaborate with Dr. Kegan on various projects.

Zachary Stein— received a B.A. in philosophy from Hampshire College in 2004 and an Ed.M. in Mind, Brain, and Education from the Harvard University Graduate School of Education in 2006. He is currently a student of philosophy and cognitive development pursuing a doctorate at Harvard. He is also the Senior Analyst for the Developmental Testing Service where has worked for years employing cognitive developmental models and metrics in a variety real world contexts ([www.devtestservice.com](http://www.devtestservice.com)). He has published in Integral Leadership Review.

Edward Kelly—

Jackie Keeley— holds first and post-graduate degrees from the University of Bath, most recently qualifying in Action Learning methodologies with the Centre for Action Research in Professional Practice. In 1985 Jackie co-

founded Harthill, building on her career as an independent consultant and her work at Roffey Park Management College. She is co-author of several papers and a contributing author to *Action Inquiry: The Secret of Timely and Transforming Leadership* (Berrett-Koehler, 2004).

Nancy Wallis— is Associate Dean for Curriculum and Program Delivery in the School of Human and Organizational Development at Fielding Graduate University. With a career as a scholar-practitioner, Dr. Wallis is committed to the study and practice of leadership that improves the quality of human lives, in small and large systems, in which personal and collective transformation are engaged, and where organizational goals are aligned with increasing social and economic justice. She serves on the Executive Committee of the Board of Directors of the Organizational Behavior Teaching Society (OBT S) and is a member of the Academy of Management. She presents regularly at the annual conferences associated with these organizations as well as at industry and client meetings.

Mary Stacey—Mary holds an MA in Organizational Leadership and Learning, a BA in psycholinguistics, and a diploma in counseling. She is a Newfield accredited coach and a member of the International Coaching Federation (ICF). She is a Founder and Managing Director of Context Management Consulting. Case studies of Mary's results are published in *The Change Handbook: The Definitive Resource on Today's Best Methods for Engaging Whole Systems* (Barrett-Koehler, 2007) and by the Information Management Forum (IMF, 2006). Her inquiry-based action learning program was designated an enterprise best practice by the CEO of Canadian Tire Corporation, Ltd. (2005).

Katie Heikkinen—is currently a doctoral candidate in the Human Development program at the Harvard Graduate School of Education, where her research focuses on the assessment of adult development, with a particular emphasis on Kurt Fischer's Skill Theory, Theo Dawson's Lectical Assessment System, and Robert Kegan's Subject-Object Interview. She is an alumni of Integral Institute and is currently on the faculty of the Integral Theory program at John F. Kennedy University. She has an article in this issue of *Integral Leadership Review*.

Terri O'Fallon—is a principal of Pacific Integral, her interests now lie in the living experiments of evolutionary systems design, adult levels of development and maturity, and the joys of ordinary living. She completed a PhD in Integral Studies and is a certified scorer of the Leadership Development Framework. She has published in *Integral Leadership Review*.

Sara Ross—is a founding partner in Integral Publishers, member of the Management Review Board of *Integral Leadership Review*, founder of the community action programs for ARINA, Inc. and founder of *Integral Review*, Sara was also the co-editor of a special issue of *World Futures* with Michael Commons on hierarchical complexity. Sara teaches and does research at Antioch University. She was interviewed in *Integral Leadership Review*.

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Terri O'Fallon, PhD, is a principal of Pacific Integral, whose focus is to

- 1 Develop support for the relief of suffering on our planet
2. Bring together people who are willing to experiment with new effective structures for realizing transformative change in evolutionary systems
3. Develop people in ways that will bring joy and wisdom into their midst through service.

Her interests now lie in the living experiments of evolutionary systems design, adult levels of development and maturity, and the joys of ordinary living.

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