

# ***Transcript: Closing Conversation of the “Validity Day” Meeting at Bill Torbert’s, October 3, 2009***

## **Introduction**

After *Integral Review’s* (IR) publication of Stein and Heikkinen’s *Metrics, Models, and Measurement in Developmental Psychology* in June 2009, Bill Torbert submitted a spirited response to the article, which IR published in its July 2009 *Occasional Newsletter* (linked in this Special Section’s Table of Contents for reference). In that response, Bill included an invitation to all interested parties to convene at his home in the autumn to learn about and discuss the validity testing to which the Harthill Leadership Developmental Profile had been subjected over the years.

On October 3, 2009, 14 individuals joined Bill at his home at 138 Parker St, Newton, MA for the day-long meeting. Ten participants hailed from across the US, one individual flew in from Honduras, one from Canada, and two others arrived from Ireland and the UK. The meeting participants are listed below.

This document is the result of Bill’s suggestion near the end of the audio-recorded meeting that a transcript of the closing conversation be prepared and published in IR. With unanimous agreement of those present, that conversation is shared as a further contribution to the dialogue catalyzed by Stein and Heikkinen’s article.

The original meeting agenda, proposed by Bill to participants who confirmed attendance, is included below as a way to orient readers to the general tenor and content of the day’s discussions. From it flowed the transcribed closing conversation that follows below the list of participants.

## **“Validity Day” Meeting Agenda**

11:00 – 11:10	Short meditation to bring us more fully into ourselves and one another’s company
11:10 – 12:00	3-minute introductions of ourselves and our current work/question
12:00 – 1:00	What is each of the three measures seeking to know about and predict (i.e., the Leadership Development Profile, the Subject-Object Interview, and Lectical Assessment)?
1:00 – 1:30	Lunch
1:30 – 3:30	What kinds of reliability and validity tests have been performed on and with each measure? (40 min. each)
3:30 – 3:45	Break
3:45 – 5:00	What kind of relationship between social inquiry and social action does the measure demonstrate?



## Meeting Participants

The following were participants in this meeting, all of whom agreed to the use of audio recording and transcription. Speakers included below have reviewed and approved this transcript.

Elizabeth Debold, *EnlightenNext* Magazine  
Jonah Freidman, Fordham University  
Katie Heikkinen, Harvard School of Education  
Jackie Keeley, Harthill Consulting Ltd., UK  
Edward Kelly, of France and Ireland  
Sandra M. Martinez, Cebrowski Institute, Naval Postgraduate School, Honduras  
David McCallum, S.J., LeMoyne College  
Aliko Nicolaides, Columbia University  
Terri O'Fallon, Pacific Integral  
Nancy Popp, Antioch University McGregor  
Sara Nora Ross, *Integral Review* Journal  
Mary Stacey, Managing Director, Context Management Consulting Inc.  
Zachary Stein, Harvard School of Education; Developmental Testing Service, Inc.  
Bill Torbert, Emeritus Professor, Boston College  
Nancy Wallis, Fielding Graduate Institute  
Karen Yeyinmen, Harvard School of Education

## Transcript

Bill: [Referring to original agenda for this last hour of the day's conversation] I'm not sure it's quite the right question, but I think one of the questions that has been coming up is this question of how to influence things more widely in terms of larger systems and so forth, so that may be closer to our question at this point.

On the back of the page with Susanne's comment, I have an outline of my developmental model of social science, showing the underlying developmental action-logics of different ways of doing social science. Empirical positivism is an approach to social science that treats only objective, third-person knowledge as potentially valid. I have been aspiring towards a kind of social science I call Developmental Action Inquiry that attempts to interweave first-, second-, and third-person research. It's something that social science has not bothered to do yet and I think ought to. So, in a way, it's my answer to the question of—why am I so concerned about this action stuff? Well, because we all are, I think, and because the question that it seems to me we all ask ourselves—although very few of us ask it explicitly is: What action would be timely now? That seems to me to be the one question that is relevant all the time and yet, it's a question that social science, as we now know it, can't speak to at all, because it doesn't integrate first-, second-, and third-person research. Most third-person research attempts to be time-neutral and, therefore, has nothing to say to the question.

This was all in the service of talking about the larger paradigm out of which I thought my work was coming, but I don't think that's exactly the topic we want to discuss right now. What do you say? Let's try something harder—like finding the question we want to discuss.

Sandra: Drawing on what you've said, I've had several conversations with people about how we—it was Sara, and Jackie, you mentioned this too...about how we might want to talk about what we share in terms of the transformation we're trying to enact or support at a higher level, at an institutional level. Perhaps we could discuss how we can support one another and how we might weave this discussion into the type of conversation we want to have about validity.

Bill: Right, and that relates to the sort of clearinghouse/network question, maybe.

Jonah: I suppose the question that comes up for me is hearing because three of you worked in, in some sense, this intervention or ambush or hearing, or wanting to hear, or are really, really curious about what we can hear together because I was very curious to hear from you also what you may have heard in your time here, perhaps what you might not have thought you were coming to hear.

Bill: Which three are you thinking of? Sort of the complexity people?

[Laughter]

Bill: I think you will have identified them as a unit.[referring to Zak, Katie, and Sara, because they share a common theoretical foundation of Hierarchical Complexity theory]

Jonah: Probably, you helped to invite us to be itself a possibility by writing the article, which was an invitation. So, in a sense, you walked into it and we walked into it by virtue of your intention, too. I'd be curious and certainly am curious.

Sara: One question that was floating in me right before you started to speak was, "What does the field of practice need from the theory side?" That's a question I'm sitting with and that's certainly related to my earlier motivation last year to suggest we need some kind of Institute of Applied Developmental Theory. But I'm just wondering in the light of the conversations today, from the praxis standpoint—is anything arising? What does the field of practice need from theory?

Elizabeth: Do you mean theory or do you mean metrics?

Sara: No, I mean from developmental theory. Yes, seeing metrics as the instrumentation of theory, but that wasn't where I was going. I guess one reason I'm asking that is related to something I said earlier about the need I see, at least, but maybe it's not something that's really a need, of distinguishing among—if we're going to choose metrics, if we're going to choose instruments, if we're going to choose intervention measures and methods and other process methods, what do we need practically to help us distinguish doing what?

Do we want to organize our thinking around someone's center of gravity or someone's performance or someone's behaviors typically in a certain domain? What kind of constructs, maybe, is what I'm asking, does the field of practice need from the theory side to help make things more useful?

David: To join you with that, it feels like we need to co-generate some new principles for both the research and the application. I was thinking about it in terms of, in many professions, there are codes of conduct and practice that are really thoughtful, reflective. People come up with them consensually and they're ways of establishing these guidelines for how we use technologies and techniques. That would be an interesting conversation to begin to sort of roll out, and it is happening. The idea of the Integral Metrological Pluralism, Bob Kegan's thinking, talking about it's not people here in terms of what we're trying to assess, but something more intangible, Susanne's, I think, concerns are the concerns about seeing people in a variety of contexts. There are a number of things already on the table that help us to shape our thinking around how this material should be used responsibly. I have energy around that, too, and I don't know if you feel the same way.

Jonah: I guess I'm curious to go back to you guys, in that. In a sense, you are going to go back and take away from here something. You came to here with something, we love it and we hopefully brought something to the table, to the floor or circle also, but in a sense, you're going back also with a variety of tasks that you've set in place. I guess I'm hoping perhaps or asking if you could share a part of that, as it were, to pre-reflect or to engage us with it, if it's possible.

Zak: I guess I'm not feeling that kind of us-them kind of thing.

Jonah: I don't mean to cast it in that way, but it's probably set up by what I call our being here by response.

Zak: Yes. Coming here was funny because it was like you're [Bill] inviting me over because you are going to yell at me about this. [Laughter] He's gonna color me counter dependent-antagonistic, yeah, I had issues with my father but you don't look like him very much. [laughter]

Bill: I'm glad we got that straight.

Zak: To be here, we're all really so fundamentally on the same team here and that's the thing. I guess for me, what I'm taking away is what can we really do? Is it a matter of like a special section of *Integral Review* where we tried our best to get, for example, Bob and we'll get Theo. We'll try to get everyone in there to make a unified statement, of course, with different perspectives, with different details about the fact that, "Listen, all the experts in this field are concerned about the way we're rolling these things out. Let's be more concerned." That would be the first step.

I'm looking more for action steps after this. What should we really do here? What would be the best place to put our energies to have positive outward ramifications? But at

the same time, I think I'm realistic about what could be done. I don't think that we can affect the everyday language that people use in the communities that surround these things in the immediate near future. I think that is going to be a longer term project where we as—for the lack of a term—professionals model more sophisticated ways of talking about this. That is what I'm coming away with. There's a sense that yes, we're all trying to do the right thing here and we're all really, I think, even theoretically from a psychometric perspective, I think we're all really looking at the same thing from different angles. That's part of my dissertation work is to show that. It's to show that there is this thing out there that's like weight. We've been going at it from all these different angles, and you know, for some purposes, a scale is fine; for other purposes, you need literally down to the microgram. So, yes, I guess I'm just feeling a sense of unity, but also just concern of all of, okay, now, what are we going to do? What more should we do? Along these lines of what would be if we decide, "All right, let's do this, not a clearinghouse but more like a group of concerned people coming together to articulate standards of practice." What would they really be? I don't think it's going to be, "Everything needs to be [reliability of] 0.96." I don't think it's going to be lines like that. If you look at comparable institutions like the American Psychological Association and Educational Research—I forgot the acronym—anyway, they've got this nice...

Sara: A-E-R-A.

Zak: Yes, AERA. They've got this nice little booklet. I cited it in the paper. They're just standards for educational measurements and they don't drop any numbers or any statistics, but they give all of these guidelines for best practices and about different kinds of validity and how to make those things and they're talking about regular old educational assessment things, not developmental assessments. And so I think that there's maybe some need for something like that.

Sara: Yes, and the different categories we find ourselves, the assessment domain and your interests there are not like my interests. Mine are different. But still, we have different kinds of assessment interests and it's not one thing we're talking about and we have different kinds of consultation and coaching, other kinds of organizational research. I mean, there's a whole bunch of different categories here because developmental stuff crosscuts. There isn't anything that doesn't fit under something we might want to pay attention to, it's crosscutting. So I think it could end up being kind of a good idea of standards, principles, attractive to me as a starting place, if nothing else to raise attention that we need to be paying attention to such things. And practitioners need to be supported, not everybody will ever be a specialist in this. We could never expect it, so what kind of support do we offer those who aren't going to specialize, but really can use this to benefit others?

Woman: Is there a best practices in terms of using assessments in different contexts that would...

Sara: That's what I think we need to create. That's my sense if something comes up and I'm sure we could draw from things like the APA and therapeutics...

Zak: That's what that got me. I mean it says—for using tests and organizational environments, for using tests for high stake decisions, for using tests for this. They specify different contexts and they talk about proper and improper usage, and it is. It was a committee of many, many people. It's interesting book. It's worth looking at. In a way, we could fold into that.

I was also thinking of other things. So there's that, but I was also thinking we need to find ways to catalyze research and cross metric comparison research, cross-model research, because these things are evolving. Ten years from now, if we're having exactly the same conversation, then we failed. We need to be talking about these new metrics and improvements that come from the cross fertilization and the multiple perspectives. So that's another thing that we were thinking about and that's the idea of the clearinghouse, I see now, I always thought of it as also a collaboration space, a space so we all know what one another is doing with the research and then it would be easier to see if we have relevant data sets that overlap or something like that. Not so much to bring unity to the field, but to make it a field where everyone knows what everyone else is doing.

Sara: A community of inquiry?

Zak: Yes.

[laughter]

Bill: My goodness...

Sandra: I'm just thinking about what you said. If we share enough, we could articulate a certain set of principles and then eventually cascade down from these principles to develop standards of practice. We can refine and modify these principles. However, at this stage, the objective would be to develop a common language. I like the idea of starting with principles because they are at a higher level of abstraction. Perhaps we, as a group, could articulate a set of principles that we could all commit to and that is sufficiently general to cover all our areas of interest. I'm drawing from what you said. After developing the principles, we could then begin to develop standards or behavior.

Sara: Yes, and we might want to move them up and down because sometimes what we call "principles" aren't technically principles at all, but we might really want them to be high level principles, so we could really do a lot of action inquiry around that.

Terri: And understanding that anything we have as a principle could easily be reified into something very concrete and not evolving, then they could be applied to support very concrete processes and behaviors and then as a result not evolve. This is one of the concerns I have.

Sara: I agree. And I think we can be really careful about how we define them, and how we look at what *is* a principle because sometimes what people call principles really aren't.

Instead, they're very reifiable things that really aren't in the principle category. So, I think we could bring some elegance to it that way, and avoid what you're worried about.

Zak: Hopefully, if we define it, whatever it becomes, so it's a living document. It's a living agreement. But that's easier to say than actually pull off.

Bill: Yes. Donald Campbell's law of invalidity—the more people start paying attention to it, the more it will get distorted. So, it requires an institution that is capable of double-loop and triple-loop change and who's going to start that one?

[Laughter]

Elizabeth: What would you propose as an alternative? If we're looking at an action to take to move forward, what would be...?

Bill: I'm just trying to hide. I'm not trying to say it's not a good idea, but in a sense, joining Terri in her concern and I'm trying to emphasize that, in a sense, that was Dostoevsky's thing about the Inquisition, you know, in the name of Jesus, the Inquisition re-crucifies Jesus at his second coming. You know, our institutions tend to turn into the opposite of what they were meant to be. I thought banks were supposed to keep us financially safe—oh, haven't they been doing that recently?

Elizabeth: I share the same concern.

Bill: Yes, but we're at the frontier of human development, generally, in trying to do this, so having a developmental theory helps us, perhaps, recognize just how big the challenge is because most people think and act in ways that are likely to distort principles into their opposites, because they won't receive enough feedback to adjust.

Edward: Perhaps then, just given that everybody, lots of you have highlighted how language trips everybody into—I mean, so when I hear "applied" I trip off into something, when I hear "principles" I trip off into something. And yet, I support the collective need for understanding of what each of us are doing. I just think it's been wonderful to get the sharing of different perspectives today. It advances things hugely in such a short time because perhaps we're putting similarities and differences out there and we have to realize lots of stuff. Going forward then, maybe, we just have to try and find some other words to ...

Sara: How would you say what you would want? How would you like...

Edward: I would start with almost the same format again on a bi-annual, quarterly kind of get-together. It wouldn't be exclusive to this particular group of people or particular models, metrics, theoretical approaches that were put up. Presumably it's something that comes under the umbrella of developmental theory, practice, metrics, whatever. Most of my knowledge is in the LDP. I'd like to spend more time on the subject-object and I'd like to spend more time on the LAS... I'd like to get this sort of inside hermeneutical

perspective that you have [looking at Zak], so that I'm not reducing what I hear from you to what I already know from my side.

Sandra: How do we do that?

Edward: I'd like to try that. I don't know how we do that. I'd like to become Zak for a day so I can see what you're saying because and likewise, to get inside...

Bill: Is there a movie about that man?

Edward: Say you push me to something. So, that's sort of what I thinking.

Zak: I like this idea of a bi-annual thing maybe, and maybe under this Institute of Applied Developmental Psychology, but there are some folks that are not in this room who should be in the room. The Spiral Dynamics team, the Elliot Jaques' group...

Bill: Yes, and Bob [Kegan] and Lisa [Lahey].

Zak: Yes, individuals but also whole groups that aren't represented.

Aliki: I'm wondering. There are a couple of research possibilities, studies that have been initiated, like for instance, the one that JFK, the one that potentially you might win. I got to wondering if there is now an opportunity to create some permeability or a study to include some of these other alternative modalities and why not engage them and decide actions to join this kind of project. I don't know if there's space within the research initiatives that you're all involved in or maybe one that can be sponsored through one of the universities that are being represented in the room here, but that might be something to take our action more quickly into action. There are some opportunities here, here in the LDP as an additional inventory that gets used or bring in the SCTI MAP as an additional inventory. Why not, if you can?

Sandra: Yes.

Elizabeth: We're hoping to be able to start to look at data together between the people who have created the metrics and be able to say, "Okay. Look at how these things are varying or how they're working together," and begin to really start to have a conversation about this together. We were hoping to get funding for that next year to really start an inquiry and do it. *EnlightenNext* is going to be putting on conferences annually and that would be part of the conference agenda for that year.

When we initiated the idea, we had such a strong response from all around the world—people in Australia, saying, "I need to know. We need to know. We need to do something about this. We need to be clear about what we're talking about together and how this thing's working." That's one thing—that there's a forum that's going to come into existence to understand the relationship between these metrics and the theoretical

assumptions that they are based on. There's also the JFK Integral Theory Conference that will be meeting every other year; this could be a module in that conference.

Zak: I know they're planning panels on a lot of the issues that we talked about it today. The issue of funding, I think, is key because as much as I'd love to pursue these things...

Elizabeth: I know. I know.

Zak: It's like time and money are really bottlenecks and I tell them one thing we can think about is somehow pursuing some kind of funding source for research.

Elizabeth: I also like the idea of doing a special issue of the *Integral Review*.

Bill: I guess it's being done, right? For January, I mean, that's why...

Sara: Yes, the next issue—the regular issue will be in December, and presumably, everybody on the list like Bob Kegan (don't know if he responded directly), Michael Commons, Susanne, whoever wants to respond directly, to have the more formal or informal whatever kind of piece, whether peer reviewed or editorially reviewed format to respond to Zak's and your [Bill's] response, which we put in the newsletter. There's not going to be a special issue dedicated to that because of course we don't know how many will actually produce. Of course, anyone from here is more than welcome to contribute anything from just a reflective essay on what was today like, to something more elaborate or any other kind of—join the discourse about the whole subject from your perspective.

Bill: Yes. Tom Murray emailed me about this, this week, said he'd like to have a tape and so, I think he somehow wants to use this...so I guess I'm assuming, but I shouldn't assume that we could share this with him.

Sara: Is that okay with you guys?

Murmurs: Sure.

Bill: That's where the request originally came from actually. I think that is a good opportunity when a number of us see ourselves. I mean look at what it does when somebody puts something in print that gets you all over-excited.

Sandra: I think it's quite amazing that we all gathered here from different continents. It's really a privilege to talk to everyone here. I hope we can continue it.

Bill: Absolutely.

Aliki: I do want to second the idea, or maybe it's the third or fifth "second" of the idea by now, the idea that maybe, there is a way that we can create some sort of an inquiry conversation that happens again in this configuration and others where we then focus the next conversation on principles, let's say. We're going to use the day to come up with

some of these notions and then, in between some of these publications, the IR [*Integral Review*], this keeping each other abreast of each other's research or ways to stay in relationship and in between the convening. I like that idea. I have a lot of energy around that.

Zak: I like it too, I mean, what was unique about this was that it was such a dialogue and there was so much reciprocity and I feel like it's hard to get that in academic discourse situations.

[laughter]

Sara: Even in just a discussion forum on the internet.

Zak: Exactly. So we'd have to create the right container. The fact that this was so personal, and I think, it really helps—and kudos for setting it up and Bill, you opening your home to us...

Bill: Good sandwiches...

Zak: Yes, yes. I wanted it to happen, but what I don't want to happen is that it turns into a conference situation where people are taking sides and it's just like, "All right. We didn't do anything." I feel like here, we're doing something and I don't know how to make that happen if it gets bigger I guess.

Elizabeth: Well, it seems like we are saying, "Let's make a commitment to the process of trying to understand each other in the theories and humanity, people in general." It is the process that we're committed to, the evolution of development and all that.

Woman: I don't want to advocate for formalizing this. I was just more interested in maybe bringing another friend who happens to represent another view to sit next to one of us and have that add to the conversation as opposed to having maybe, Michael Commons come and Bob Kegan, and I don't know, whoever else there is.

David: Although if they could—wonderful, because I think that there's a kind of weight about having the sort of spokespeople of these different lineages of development. That does have a certain cache in a larger field. We've got a lot of Experts and Achievers who are picking up these paradigms and using them in pretty instrumental ways. It makes a difference when you have certain names on the flag-staff. But wouldn't it be good to have a weekend where we can have a "Flex Flow" structure for the weekends and good food, nice drink, good clean water, and spend some time basically having this kind of conversation. That would be very nice.

Mary: I'd like to go back to that practitioner question that you asked. I think, from a practitioner's perspective, I would ask that you keep the spirit of dialogue alive when you're going to your writing and your publishing, because we depend so much on it to stay current. We have so much translation and bridging work to do and need to depend on

you to have had various conversations. When I read [the article]—I guess it was June, I was distressed. In the LDP I'd found something I could take into business and the language was close enough. I had this huge "Oh, shit" moment that I think has been addressed in being able to sit in on this conversation. My request is that you keep the spirit of dialogue alive when you're going into those other ways of communicating.

Elizabeth: May I ask? Are you asking for the language to be more accessible or are you just asking for there to be a more conversational way of engaging with these questions...

Mary: I'm making the distinction between myself as a practitioner and some of you as academics, I'm asking you to create dialogue in other contexts as you're writing, as you're publishing in journals and what-not. I'm back to my first, "What's the responsibility we uphold to be in dialogue, be in a conversation before we 'go out'" because it's just so important for us as practitioners to be able to trust, to be very literate, and to be willing to do the translation work that we do.

Sara: It's a huge burden, that practitioners share—because some of us are both—to be so multilingual across theories. I mean, it's a lot.

Mary: Let's help each other avoid the "Oh, shit" moment.

Sara: What were you referring to? What was the "oh, shit" moment?

Mary: It was reading the journal article in June [Stein & Heikkinen] and realizing that this measure that I've invested in, had taken into my company and out my clients, was being questioned in such a clear way and I couldn't really read into it what that meant.

Bill: "I'm using the LDP and they decided it has no validity."

Mary: It's just more about this spirit that's living here today and I think it's probably expanded and I just wanted to highlight it.

Edward: Has that only happened to you once in the last year?

[laughter]

Mary: If we can spare each other those moments, then let's do it.

Jackie: What that makes me think about is how not to rarify the conversation and to somehow find ways to bring in the voices of the people with whom we're actually working with these measures and the different ways there might be of bringing it to them. How can we get their experiences back into the process so that we know that what we're doing is making sense to them and giving them some value in their lives? I don't know how will you do that, but it seems to me that would add another level, another important voice, another person into the research. So that, I think, is speaking more toward what you're

saying, Mary — in a way, what could we do to contribute to the ongoing conversation, but do it from a practitioner's point of view?

Sara: That gives me an idea for a book. [Laughter] Seriously. A practitioner book everyone could contribute to with their...

Woman: Right, and the stories are neat. My client is resisting doing what we would all say is suggested.

Jackie: Of course. When you think about doing it in Russia, you've got all of that complexity we were talking about in the beginning and what impact does that have on the situation?

Sandra: I think we've been terribly collaborative. I didn't know what to expect of this dialogue today, but it could have turned out differently and I think that it is reflective of who we are personally and how we work. I'm hearing that you want it to be open and inclusive and collaborative. Maybe I'm reading this into it, but this is how I'm interpreting what I am hearing.

Terri: I'm appreciating the quality of the conversation, the dialogue and the intention behind it all today. It feels very alive to me and I'm encouraging that as everybody goes off in disparate ways and to their own work. This kind of spirit can be infused there, too.

Nancy P: Instead of going back to our own camps and just writing about...[Crosstalk ]

Terri: If I were with that corporate client, we'd be talking about silos and cross-fertilization. What clients (and we) can learn is, "I can pick up the phone and talk to this guy first before we make our critiques public." Just keep the spirit we have here moving into the practitioner's circles.

Zak: I started us all off making this comparison to biotech and I made this argument that I think psychological technologies is a growth industry. I think we may be underestimating the demand that is going to be arising in the next decade or so, surrounding organizational change and the assessment of human capabilities, I mean, there's a long literature on it, take Daniel Bell's *The Coming of Post-Industrial Society*, where he basically prophesizes that in the near future it's not going to be the ins and outs of industrial technology we are going to worry about, it's going to be the motivational and capability systems of employees that are going to start to be the main problem in information societies, post-industrial societies and I think that's where we're about to be. Look at Google. That's a five-year shabam and all of a sudden it's too much information for everybody. We're just in decision-making crisis after decision-making crisis. And at some point, people are going to start to realize that, "Oh, yeah, there are these developmental psychologists who've been worrying about this already for two decades." The reason I like the fact that we're having this conversation is that we can't let the market mechanisms hold sway here.

We need to keep an eye on the ethical prizes, which are to evolve consciousness and cultivate the broadest, deepest humanity we can. In the beginning of the biotech thing, they would never have the thought that you'd be getting a bunch of these companies together, because they'd be sharing trade secrets with one another. We're in the opposite position. Where we want to learn from one another, so that we can reciprocally make one another stronger. I think if we can keep that, then there's a potential for this to do a lot more good than it would otherwise do if we factionated, and compete as opposed to collaborate.

Sara: And I think what evolutionary potential is, is that if there's anything ailing us in general, societally, globally, is how fractured, how compartmentalized we are... If this field finally gets out there a unified understanding of the organism as a whole. I mean, a fractured field does no good in that respect. But we're positioned well with all these different windows and time horizons—we're really well-positioned to disseminate and operationalize much more holistic understandings of whole human beings, so I think that we have a lot of important work to do there, too.

Zak: It's critical. We need to show—and this is my 1984 hat that I'll wear now—we need to show that people can transform without invasive biomedical interventions. Because that is where we're going. All the work that I do in the field of Mind, Brain and Education, is primarily about that. I'm saying, "Stop. Don't just give the kid a Ritalin, worry about the institutional norms that are interfacing with this biology, not just this biology."

We need to have ways of showing that people can transform because it's clear people are needing to transform. We face epidemics of psychological disorders, of depression and "hyper-activity" and these kinds of things. And the way our cultural mores are, we say, "Just give me the med." And it's going to be different now. And that trend will increase. There are these intracranial stimulations. I mean they're going to do that. So I feel a sense of urgency. But I can only make so many arguments to these folks about... "This is unethical." Right. Then they say, "Well, what else are you going to do, buddy?" I went to a meeting of the Neural Information Processing Systems Society, and it was frightening. These were the most rampant reductionistic guys. And they are getting endless funding. There's an urgency here to show that we can do this as psychologists; we can do this by changing people, their action patterns and the way they speak and all of these things.

Karen: I think your question about funding is really important, too, because my husband's in biotech. He was working for a biotech start-up for a while that was working on early stage drug development. They weren't worried about bringing the drug to market. They wanted to come up with early-stage compounds that could go into the pipeline to be ultimately developed. They had trouble coming up with their second round of funding because whenever they went to the investment community, the investors would say, "This is exactly what we need because the industry is drying up." We have these certain compounds and they've been used and used and used to death. Everyone's trying to take those same things and bring them to market differently because that's where the money is. People—it's like low-risk, high pay-off, whatnot and this is really high risk; but it's

what's needed by the industry but there's no funding to support that even though that's what's needed. There seems to me it's interesting that you pick the biotech industry as a comparison because I wonder what else can we learn from what's going on there about what we don't want to do and this connection between where the funds are going being different from what's needed. How do you shift that? Where is the value proposition to the funders?

Zak: And it's comparable at multiple levels because there's one foot in the academy, one foot in industry-type of thing where high level knowledge and work with big-time effects on society. It's true. Biotech is at a plateau, more or less. We crack the genome when we thought we could find all its secrets. The truth is that we don't know. I think that this next thing is going to be just like biological technologies and we need to get a handle the quality control there. The FDA is a terrible example, setting standards. I think that we need to worry about quality control and to learn lessons from biotech.

Nancy P: I think we also need your point about giving a kid Ritalin is reminding me that, I think, a lot of fragmentation is that we're taking people and parts of people out of context. We're separating the kid from the environment and saying, "Okay, this is the behavior. Let's fix the behavior when they're not looking." One of the big problems with medical doctors is you go in, they're treating you like a bundle of symptoms rather than a whole person, so it's picking things apart and forgetting the context of the whole person within their environment. To me, that seems like a really crucial thing to keep bringing this back to this—what's the context?

Elizabeth: That's the structure of mind and consciousness at a developmental level. It's a really interesting thing because the ethical and moral demand of our time and of our profession is something that is way ahead of the normative curve where the culture is and where these decisions are being made. I appreciate your bringing in the transhumanist dimension of how development is going to happen because we've got all these achievers, if you will—there are so many different terms for that level—who are saying that we need to evolve, that human beings need to evolve and the best and fastest way to do it is through this medical and technological drug intervention. We need to actually broaden our horizons to see this as part of the developmental world even though it is not what we're about at all. But that is actually the marketplace, if you will, that we're competing in.

David: It's the modal developmental level at which this stuff is being instrumentalized.

Elizabeth: Exactly, and being understood. That's a very interesting thing for us as practitioners and researchers. Where are the places for intervention? What is it that we need to demonstrate? How do we move this forward to the culture in a way that is going to have an effect so that enough leadership decision-making is happening at a different order of thought rather than this? There's a heck of a lot of money to be made in it and that's the modal developmental level.

Zak: The psychometrics are integrated. The statistical diagnostic manual, I mean, the DSM. That's the IQ psychometrics and the whole rhythm of things is tied to this testing industry. There are so many places to push to make things shift, and so...

Sandra: I hope you articulate your arguments in this article because I think...

Bill: I was thinking actually, a little edited version of this conversation could be in the [*Integral Review*] journal because it catches the liveliness and some really important, powerful things have been said here in the last five minutes.

Sandra: The specific arguments that you have recently made, Zak, are critical. I believe it is important to articulate your arguments well and, in your comparison of growth in the biotech and the burgeoning developmental assessment industry, to illustrate how solutions for developmental issues are being sought in certain technologies divorced from a concern and appreciation for human development. Secondly, to a certain degree you need financial clout and backing to gain legitimacy. If part of acquiring legitimacy is getting financial support from a large agency for a large-scale study, maybe we could individually think about what that study could be and who would support it.

Terri: Also, thinking years down the road, when we are in this place where we're no longer in the biological money-making business of biotech, but we're in the psychological money-making business—so, psychological tech—are we going to become siloed again and have the same mindset towards our money-making as the biotech does now? Are we going to actually remain in a community where we're not looking at ourselves; how we can be political about psychology? So... this is something I feel so concerned about. I'm really here with the heart of knowing that everybody has pieces of humanity's puzzle and no one has all of them. If we can work together in a proper way, everybody will flourish, but coming out of the silos to re-silo again is not going to be the answer here. I'm personally going to make a commitment not to fall back into that again, which could easily happen. That's something to think about.

Jackie: This is a very specific challenge and this is about silos because being published in the *Integral Review* and all of the places that we all know and love to read is one thing, but that's actually, a really tiny little bit of who's paying any attention. We're paying attention to what we're paying attention to know. We don't know who else is out there.

Bill: We are the readership!

[laughter]

Jackie: Yes. So I can try to think about this for UK, for instance, but then, I don't know where I'd look to get something published. Where else could you get published in the US that would widen the audience? It seems to me like a really important question and turn to thinking about going down to this root.

Zak: I can tell you that I edit a special section of the Journal for *Mind, Brain and Education* which is an award winning journal. It's got a wide dissemination and it's funded by Blackwell. It's a major mainstream academic journal. I would welcome any submissions about any of this kind of stuff—this research-practice thing, the multiple models of development thing and again, the educational aspects would be relevant for that journal. I like the idea of pushing into the mainstream academic journals with this stuff, but the truth is many important readers are not from mainstream academics.

Woman: Yes, exactly.

Zak: My articles that are published in *Integral Review*, I think, more people read those than the ones that I publish in *New Ideas in Psychology*, or *Journal of Philosophy of Education*, or things like that. I mean the academy is fragmented and siloed. There are so many people publishing so much crap and the question of where to say something, where it matters that you said it, I think, is a core question. I really don't know.

David: Part of leadership is getting people to pay attention to the right things, so how do you catch the attention of the right folks? Oprah has a very skillful way of doing this, doesn't she?

[laughter]

Karen: It is a classic adaptive challenge. How do we get this set of stakeholders? Who are the set of stakeholders? What is the work? What is it that we're trying to do? I think we've captured some of that here, but in the Heifetz model you start by defining the work. What is it that we do agree we're trying to do? I think there's been some of it out there today. Then, who has a perspective on that thing? What are those perspectives and what do they have to lose if we were to achieve that thing? So then, let's start maybe there...

Elizabeth: What's interesting is that when you shift the focus away from "Here we are together with competing measures" or "Here we are together trying to come to an understanding of how we assess and what we mean by development" to the larger questions. It gives us even more ground for unity. We're all together in not wanting a certain future to arise. We all want, as Terri said, to serve consciousness and are very concerned whether consciousness development can happen in a context that is materialistic and that we perceive as dangerous to the larger whole that we're all a part. It's an interesting re-frame that enables you see the problem in a different way. And therefore, our unity becomes more rich and tangible. But then, what is the action step that will make that mean something?

Bill: I was really somehow particularly struck when you said, Zak, about ten minutes ago, you know, I've tried to do this all my life, but I just heard it for the first time. We're trying to make transformation a real possibility for people and that is so different from incremental change. It's driven by a completely different form of power—for me, at least. It does indeed have to be mutual; and that, in turn, prioritizes the second-person present form of research, which is the form we've been conducting today. Instead of somebody

coming in and telling everybody else what's going on, we're here trying to keep the questions in the center.

It just comes back to what you were saying, Mary. That explains why it's so important to keep this spirit going because it's really the only spirit that supports transformation. None of us could have forced any of the rest of us to care about our stuff, and we didn't go about it that way, so it worked today. But that's not the way academic discourse usually moves. I'm just putting together why it is so important to keep this element of it. That's of course part of what needs to be highlighted: the centrality of an active community of inquiry. It seems obvious because that phrase comes from academics, though it never applies it to itself in the real way [laughter] but it's what's true in a corporation too, right now. For them to survive and transform, they need to have an active community of inquiry. These boards of directors that rubberstamp things is what got us into the last two years. So, in a way, this is a question which is not only true for us as developmentalists—although maybe, it's hyper, hyper-true for us, really, *we* ought to be the ones who got it—but it's also what is a societally-needed form of activity. Part of our action is actually in doing this but then, how does it get, as you were saying, how do we get other people to see that?

I'm just being helped to get myself to rewrite this old book of mine, *The Power of Balance*. And the new title is *When Will We Discover our Mutually Transforming Powers?* It is meant to speak to a lot of different kinds of people, so, maybe, that can play a role, too. Certainly, everything I've heard today is getting siphoned into my thinking about how to revise the book and make it more accessible.

Terri: One of the things I appreciate, in a way, is that typically the whole world has their eyes riveted on certain popular places and tantalizing ideas and then there's the common sidewalk with the obscure dandelion tentatively growing, spreading its little seeds everywhere, being under the radar kind of like we may be here—since we aren't in the spotlight it does give us some flexibility that others wouldn't have because we don't have the whole world looking at us...we can start from a more principled position where certain political interests may not kick us and push us and shove us and shape us. We can really shape ourselves with the kind of ethics, the kind of process, and the kinds of developmental level that eventually humanity *will* be looking at. So, we have a responsibility right now, being in this space of planning for the illuminated future for developmentalism. It's a place where in the future, the whole of humanity will be looking at *that* and some other flower will be poking out of the sidewalk. What are they going to be looking at 10 years, 20 years, 50 years, 100 years down the road? What are we doing here today that they will be looking at then? That's my question.

Bill: Mmm, I'm sure glad we have every single voice here today as I listen to your voice. Thanks, folks. Let's stop, and then let's go. Thank you very much.

[general appreciative applause on part of all for all...]