ADVANCES IN PRESENcing

Edited by Olen Gunnlaugson, Ph.D. & William Brendel, Ed.D.

A timely anthology showcasing Theory U and presencing perspectives from the latest research of practitioners in the field
ADVANCES IN PRESENCING

Volume 1

Edited by
Olen Gunnlaugson, Ph.D.
William Brendel, Ph.D.
Dedicated to the emergence of presencing as a viable field of research and practice
About the Editors

Olen Gunnlaugson, Ph.D. is an Associate Professor in Leadership and Organizational Development at Université Laval (Canada) where he teaches MBA courses in leadership, management skills and group communications to managers, leaders and executives. With a research background in Leadership Development, Group Communication and Leadership Coaching, he received his Ph.D. at the University of British Columbia and did his Post-Doctorate at Simon Fraser University, Vancouver. To date, his work has been published extensively in books, articles and chapters in leading academic journals and books. He has presented and keynoted at numerous international conferences, received several teaching awards from universities in Canada and the USA and taught emerging leaders and executives at leading schools in Canada, USA, Austria, Sweden and South Korea. Over the past several years, he has been researching and developing Dynamic Presencing. As the focus of his upcoming book to be released in 2020, Dynamic Presencing offers an apprenticeship journey into developing and transforming your current presencing practice to new levels of mastery and depth.

William Brendel, Ph.D. is an Assistant Professor of Organization Development and Change at Penn State University and is the CEO of the Transformative Learning Institute. William has over 20 years of experience as an organization development consultant, researcher, author and trainer. His publications on mindful leadership and organizational change span academic journals and popular press. His consultation and workshops have led to measurable transformations in organizational culture and performance across the U.S., China, India and Africa. William has previously held academic positions at Texas A&M, Temple University, and the University of St Thomas, where he has taught graduate courses in Organization Development, Leadership Development, Change Management, Talent Management, Group Dynamics, and Transformative Learning. William received his Doctorate in Adult Learning and Leadership, and Master’s degree in Organizational Psychology at Columbia University in New York.
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Sensing into the Future of Theory U: Catching up with Otto Scharmer and Adam Yukelson

William Brendel

Introduction

I recently had the unique opportunity to sit down separately with Otto Scharmer and Adam Yukelson of the Presencing Institute (PI) to learn more about their unique perspectives regarding recent advancements and initiatives. My dialogue with Otto, the institute’s Founding Chair, began with a preview of some of PI’s latest work, including the surprising scale and progress of the Societal Transformation Lab (u.lab-S), a worldwide innovation network that pools their energies to facilitate greater well-being around the world. We also talked about what greater well-being looks like and how it might manifest in both ordinary and profound ways. Finally, we explored the ways we must change our relationships with technology and education to make these shifts sustainable. My dialogue with Adam, who co-leads the design and delivery of PI’s large scale innovation platforms, focused on learning opportunities made available by PI, not only for individuals but also groups and teams, as an attempt to bridge the gap between theory and practice. We also discussed how scholars and practitioners can collectively work to clarify common areas of confusion that arise when people learn Theory U. Lastly, we talked about how the PI team bends the U process inward to guide their own strategic planning and day to day work. While my dialogue with Otto and Adam took slightly different paths, they both confirmed that PI is poised to bring its original intention to life in a time when the world seems increasingly disconnected and ego-driven.

Later in this chapter, PI’s depiction of a better future will likely remind you of similar well-being
efforts by other organizations. What is strikingly different however, is the extent of thoughtfulness amongst the PI team to: 1) thread their sense of purpose throughout even the most mundane, technical and structural components of their operations; 2) position PI uniquely, not as a transformation effort in and of itself, but rather as connector and amplifier of all change efforts that share the contours of the Theory U philosophy; and 3) maintain faith that a critical mass of humanity will indeed evolve during a time that may seem hopeless.

Weeks after our discussion I found myself thinking about what PI could do currently, given context of its programs and planning, to sustain the rigor and relevance of its initiatives well into the distant future. As a thought experiment I fast-forwarded ten years, imagining various scenarios for this rapidly scaling effort. This exercise generated three substantial areas of additional exploration in this chapter.

My first commentary employs research and practices for managing loosely coupled systems and analyzing social networks (Burke, 2014, Orton & Weick, 1990, Weick, 1976) to explore ways in which PI may effectively balance centralized control with decentralized empowerment of their network. My second commentary focuses on proactively managing intragroup dynamics and conflict (Gaertner & Dovidio, 2000) between PI and the myriad of societal transformation organizations it is bringing together as part of u.lab-S. My third commentary focuses on the critical influence of adult learning style preferences (Kolb, 1984; Kolb & Kolb, 2005; Kolb, 2000), which may lend insight into why people experience difficulty transitioning from the bottom of the U into stages of Prototyping and Crystalizing. Although these commentaries are not exhaustive, they are meant to spark further conversations within PI and its broader network. Later, particularly in the section focusing on Adam’s work, I bring these commentaries together to produce strategic learning solutions that may help PI sustain its global efforts.

Catching up with Otto

My conversation with Otto began by aligning our attention with intention, specifically the original intention of PI and its connection to u.lab-S. Otto framed this original intention as “linking spirituality and science with practical societal evolution and change.” Otto threaded this ambitious statement through the institute’s evolution, a journey through the U process in its own right, up until present day. As PI has clearly strengthened its capacity to continuously invite and connect individuals across the world, according to Otto, the next movement of evolution involves supporting broader, “networked infrastructures of teams that feel deeply connected to the original intention of Institute.” To scale efforts on a global scale PI has been very planful in its approach, given many other similar well-being initiatives that have gained traction. The idea is not to compete, but rather to connect and provide holding
environments for further innovation between teams, many of whom stem from these organizations. Operationalized, u.lab-S is a “multi-local innovation journey for teams who are co-shaping more sustainable and equitable social systems worldwide” (u.lab-S Website, 2019).

In addition to cultivating a global infrastructure, Otto suggested that another condition for the success of u.lab-S initiative that has emerged recently is a strong, authentic desire from the social field. Humanity is reaching a type of critical mass, according to Otto, approaching an outcome of what he characterized as the increased noise of Absencing versus Presencing. As a result, interest in PI and u.lab-S are at an all-time high. While u.lab-S was originally attempting to launch their work with 100 teams they received 350 applications. Otto shared that they will now likely start with 250 teams. It is clear that while PI itself is small in comparison to its global aspirations, the primary drivers of change will include its network of teams. One of the application criteria to become a u.lab-S team helps to fill in this influence gap: “Conveners / teams should be in a position to influence some element of the system you want to transform (either as a grassroots activist, an institutional leader or through some other mechanism of change (e.g., public opinion).”

Given the impressive scale of u.lab-S at its very inception, after my discussion with Otto I found myself wondering what it will take to sustain this network over the next ten years. In contrast to the speed at which this initiative will likely spread, the size of PI’s central operations seems disproportionately small. Over time, could the quality, rigor, and original intention of PI fade? While Theory U is designed to accommodate a wide array of cultures, leadership styles, spiritual orientations and other contextual anchors, teams and individuals must still be familiar “enough” with central tasks and mature enough in grasping its deeper intention. Evidence of such a bar or standard became apparent in our call for chapter submissions to this book series. While a great deal of submissions demonstrated a strong level of experience, proficiency, and maturity, a few did miss the bar.

Developing strong teams with a master-class understanding of Theory U, as Otto and his team continue to accomplish, is a critical step in sustaining and aligning the process and intent of u.lab-S across distance and time. These teams will serve as critical hubs for clarification, continuous learning and even local recruitment. What more can PI do? As an Organization Development consultant, I am brought back to the question: given its unique context and intention, how much should PI balance its structure and span of control (tightening) with empowerment and flexibility (loosening)? Literature and research on Loosely Coupled Systems (Weick, 1976; Orton & Weick, 1990; Burke, 2014) or LCSs, provide a helpful starting point for addressing this question.

Karl Weick (1976), known for his work on loose coupling, as well as mindfulness and sensemaking in organizations describes LCSs as “a situation in which elements are responsive but retain evidence of
separateness, in terms of logic, physical nature and identity” (p. 3). He later wrote that “loose coupling is evident when elements affect each other suddenly (rather than constantly), negligibly (rather than significantly), indirectly (rather than directly), and eventually (rather than immediately)” (as referenced in Orton & Weick, 1990, pp. 203 – 204). Weick notes several advantages of such systems, which (1) lower the probability that the central organization will have to respond to every slight change in the environment; (2) heighten sensitivity to changes in the environment and therefore know their situation better than a tightly coupled organization; (3) adapt to unique local needs in an economic and sustainable fashion in a way that strict standardization does not allow; (4) retain a greater number of novel solutions; (5) remain “sealed off” from deterioration in in other parts of the system; (6) greater agency and efficacy with local actors (i.e. facilitators and teams); (7) reduce the amount of money and time that is typically required of tightly coupled systems.

Still, consistency in intention, action, and feedback – all critical success factors for Otto and his team - are necessary to prevent an LCS from fraying too much. Over time and distance, it is likely that some components of the Theory U process itself will be taken out of theoretical context, repackaged around a different social theory, utilized as a tool within a different transformation framework, or locally customized to the point that it loses its essence. Weick (1976) offers the following advice:

Given the ambiguity of loosely coupled structures, this suggests that there may be increased pressure on members to construct or negotiate some kind of social reality they can live with. Therefore, under conditions of loose coupling one should see considerable effort devoted to constructing social reality, a great amount of face work and linguistic work, numerous myths (Mitroff and Kilmann, 1975) and in general one should find a considerable amount of effort being devoted to punctuating this loosely coupled world and connecting it in some way that can be made sensible (p. 13).

With regard to the u.lab-S’s intention to steward a multi-local innovation journey, Burke (2014) offers helpful advice for managing changes that will naturally arise. From time to time as changes occur internally and externally to an LCS, Burke suggests it is important to know what should be tightened and what should be loosened, through Social Network Analysis, a process that identify gaps in networks, the specific types of roles members play that impact change management, and tools for large systems interventions. This analysis would require members of the PI network to, respond to a brief questionnaire asking them to identify people with whom they interact within the organization. The interaction can be identified as information exchange, informal relationships, simply as those one works with most closely, and so on… The
typical outcome is a computer-generated picture or map with small circles or dots depicting organizational members and lines between the circles that show who relates with whim and perhaps how often (p. 429).

I believe that additional value to Social Network Analysis can be realized when developing strategies for targeted educational opportunities in spaces that promise greatest impact to the network, as opposed to educational opportunities that impact an area of the network that has little if any connection. This will be a crucial step for strengthening PI and the u.lab-S network.

In addition to upgrading institutional infrastructures to support u.lab-S and tapping into growing interest, Otto shared that,

As a community we are now at a point where we can really have a positive impact on many other networks and initiatives of change. This next year will really shift the field for us because we will – in even greater fashion – directly deliver on our original intention.

According to Otto, these teams will build their shared goals around seven levers of that drive comprehensive social impact: Democracy and Governance, Farm and Food, Finance, Health, Education, Business, and a Cross-Cutting category that bridges ecological, social, and spiritual divides. Collectively according to Otto, these levers serve to influence healing, health and well-being, while closing spiritual divides.

Creating a vision and strategy for u.lab-S is a labor of love on its own, but how does one get the process rolling? According to Otto, PI recently held a space with 12 other co-convening organizations. These included Ashoka, League of Intrapreneurs and other similar organizations. Otto described this as a process of reaching out and creating a more collective holding space: “The way you build a platform is to model what you want to see, which is a kind of collaboration, co-creation, and shared sense of ownership of the larger platform that is to be formed.” While we discussed this experience, I was immediately struck by the caliber of participants, all key players in their own right with well-defined agendas, markets, strategies, and stereotypes cast upon them by other well-intentioned non-profits. I found myself thinking about what might be done to manage conflict that will likely arise during and following the convening approach that Otto described.

Despite their designation as non-profits, participants will likely need to quantify the value of participating in u.lab-S in relationship with the cost. This return on investment is not always self-evident, and will become more important later on when participant organizations decide who primarily drives and invests in what is created. This is a heretical thought given the collaborative ethos of PI and other
organizations listed, but still, responsible non-profits will be motivated at some level to quantify their
direct social impact in relationship to the time and energy they invest. While good internal and shared
intentions exist between u.lab-S participants, successful stewardship of this effort by PI will address
natural conflicts before and as they arise.

While intergroup biases cannot be completely suspended, efforts like u.lab-S might consider
incorporating proactive processes up front. One activity that u.lab-S already includes is the development
of superordinate goals, which are shared goals that cannot be realized without balanced cooperation of all
groups that comprise the STL. While this is a common step for framing shared intentions and outcomes,
three additional activities – Decategorization, Recategorization and Mutual Differentiation – are shown to save
time, effort and potential heartache (Gaertner & Dovidio, 2000). To decrease stereotypes and outgroup
biases, Decategorization involves getting-to-know-you activities at a more personal and individual level,
versus framing participant discussion around the way each identifies themselves as a member of their
organization. Individual differences are appreciated and the validity of stereotypes and outgroup biases
begin to dissolve, and sometimes immediately. Recategorization involves defining group categorization at
a higher level of “category inclusiveness”; that is to say that participants come to learn that they are in
many cases members of the same group, such as a school of thought or superordinate groups. Lastly,
Mutual Differentiation,

encourages groups to emphasize their mutual distinctiveness but in the context of
cooperative interdependence. Also, by dividing the labor in a complementary way to
capitalize maximally on each group's relative superiorities and inferiorities, the members of
each group can recognize and appreciate the indispensable contribution of the other.
(Gaertner, Dovidio et al, 2000, p. 10)

Decategorization, recategorization, and mutual differentiation not only make logical sense, but
are relatively easy to integrate and stylize given the processes and underlying intention of u.lab-S.

Moving from strategy to outcomes, Otto and I began exploring the broader context in which u.lab-S’s
are being conceived. I wondered out loud whether our society is experiencing birthing pains, and asked
Otto what types of societal transformation are waiting to be born? Specifically, I asked about how
transformation would manifest in every day events, “What might we see and experience that indicates the
type of change you envision? When you turn on the news, or talk with someone on the train, what do you
suspect we will see or hear?”
Otto’s reply:

Yes, a pain related to giving birth to something that wants to be born” Otto agreed, “that’s actually exactly the case. The crisis is one of letting go and letting come, from one established way of operating to another one. I think in terms of the framework and message in Leading from the Emerging Future: From Ego-System to Eco-System Economies (2013) book as well as the closing chapters of The Essentials of Theory U: Core Principles and Applications, which describe the societal evolution that we are in. It's a birth pain for what? In terms of Theory U, I would say birth pain until I go into 4.0 on these various systems levels for farmed food, education, health, finance, business. It's spanned out but you can see the same evolutionary shifts in all of these fields, which is exactly what the five or six initiatives we are launching in the next few months we are referring to.

In terms of what we might be seeing, Otto shared:

In general, we would see awareness, consciousness, people paying attention to each other, to themselves, and to the natural environment as well. We would have economic mechanisms that focus more on well-being for all, so that levels of inequality would decrease. We would learn to not only live, but also co-evolve with nature so that we get a much deeper appreciation of what she is for us and what we can be for her. To some degree, that's happening. We'll be moving into society where for more and more people, there will be much higher degrees of freedom. The reality is, if much of the work is being done by machines, which is what we're moving towards, it means that the jobs that are left are basically social, and call for empathy, well-being, the human interface, and the creative realm.

Knowledge of these shifts, according to Otto, will be important, but what emerged in our dialogue as even more important is the level of responsibility each of us assumes. When I think about societal transformation, I am reminded of a couple of ways in which they take place. Sometimes they evolve incrementally. In other cases, which may characterize the transformation Otto is speaking of, change occurs with the speed of an epidemic.

In The Tipping Point, Malcolm Gladwell refers to this moment of change-unleashed as a “moment of critical mass, the threshold, the boiling point” (2006, p. 12). What this might look like locally and globally, both in person and through the web, is hard to say. While the change will likely not be driven by
any one specific organization, the smaller scale changes developed by PI’s hubs and laboratories will be a key. Gladwell describes the paradox of the epidemic: “that in order to create one contagious movement, you often have to create many small movements first” (2006, p. 191). In fact, the design of u.lab-S meets this criterion as it describes itself in promotional literature as a structure for activating and amplifying “a locally anchored, globally connected net-work of hundreds (and over time thousands) of cross-sector change initiatives that are working to build new economic infrastructures that generate well-being for all.” For more on how to accomplish this, one can refer back to the work of Burke (2014) who integrates Gladwell’s specific change agent roles (Connectors, Mavens, and salespeople) into social network analysis and epidemic change.

Otto continued to explore what this new world will require of the public at large:

A lot more people will have to reinvent their own lives because many of the basics are already taken care of. We will need a new educational system that supports that. We will need to use technology in a much more mindful way. A nutshell summary of the 20th century can be found in Rachel Carson’s Silent Spring, which addresses the unintended impact of technology on nature. In the 21st century, the story that's unfolding now, is that we see the unintended impact of the use of technology on the mind, on our interior dimension. Moving forward 10, 20, or 30 years further, hopefully we will be a lot more education around that. Of course, we will still use technology, but we'll use it in a way that interferes less with our own inner growth and evolution and in a more organized in a way that is helpful rather than an obstacle in that journey.

Later I had a chance to read the work of Rachel Carson, and it is clear that the inroad she suggests for change is greater presence. According to Carson, “The more clearly we can focus our attention on the wonders and realities of the universe about us, the less taste we shall have for destruction” (Carson, 1962, p. xix).

As we concluded our discussion, Otto shared what might be a defining characteristic of societal transformation:

For me, maybe the main characteristic of the society of the future we are talking about is that we succeed in protecting our own humanity which is at risk at this point. Protecting our planet and protecting our social relationships which are in the process of falling apart. That is nowhere clearer than here in the U.S., but it's happening all over. Societies are falling apart.
Recalling Otto’s sentiment sometime after our discussion, I reflected on the concept of dialectic, from the great German philosopher Hegel, which suggests that society will continue to fall apart and reassemble collectively over and over again, as if in a social spin cycle, but all in the direction of some kind of perfection (Fox, 2005). Whether or not you agree with Hegel’s philosophy of progress, one cannot disagree that the world is facing crises like never before, particularly with regard to the physical harm being done to our planet, and the sad irony that despite our greatest achievements in technology, children continue to starve, terrorism continues to flourish, and political corruption seems all but inevitable. I believe the point Otto makes above constitute two invitations for the reader. First it intimates an existential question not only for the world but for the individual: what role will you play? Or in PI parlance, what type of footprint do you want to leave behind for humanity? The second is that Otto seems to be inviting us to address the greater well-being of mankind not as individuals, but as part of a social fabric. In PI parlance, this is often referred to as a social field.

Otto’s next comments entertained the possibility of society being unwound entirely.

If we want to have a society moving forward, we need to rebuild these foundations. It's not good enough to fix the old stuff because it's already dead in most cases. We need to learn how to activate really generative social fields. That's the most scare resource I would say exists in this century. And that, at its essence, is what Presencing and Theory U are helping you to do.

As you may suspect, my discussion with Otto at times felt like jumping from mountain top to mountain top with little time spent in the details. However, this conversation pattern makes an important point as we were able to ground our thinking but at the same time leave space for further reflection. It reminded me of a meditation activity conducted by Arawana at an institute retreat I attended several years back. We focused on how we are rooted, centered and connected to our planet, before shifting our attention upward to the infinite. Holding both of these orientations at once is the trait of transcendent leaders. Otto modeled this well.

Indeed, the process that is written all over the work of PI is learning, or adult learning to be more specific. It is a balance between the tensions of what theorist David Kolb (1984; 2005) calls concrete experience and abstract conceptualization, and between active experimentation and remote observation. My conversation with Adam demonstrates how PI is managing these tensions by providing learning opportunities that complement the presencing process. I elaborate more on these important tensions in the context of PI next.
Catching up with Adam

Unlike Otto, who I had met previously, this would be my very first conversation with Adam Yukelson. Given my background in adult learning, I was eager to hear more about Adam’s supporting role at the institute and specifically u.lab-S. When I asked him to share about his work at PI, Adam shared that his primary role includes creating ‘online to offline’ infrastructures for communities of individuals and organizations around the world to teach themselves theory. He continued,

What I’ve been primarily been involved in has been the U.Lab and now newer initiatives that build on theoretical principles. The basic idea is that while you can learn about our work by reading and understanding the theory and having an intellectual understanding, learning primarily comes alive through practice.

This struck me as a natural maturity process for the institute, which is now looking into the use of technology to enable learning from experience, or what Dewey once referred to as a Genuine Education, which exists in the moment. Dewey himself remarks, “cease conceiving of education as mere preparation for later life, and make it the full meaning of the present life” (Dewey, 1893, p. 50).

Here we also have a classic tension in adult learning described by Kolb, between the value of abstract conceptualization (thinking) in which we run scenarios and thought experiments about how we might apply an approach, and concrete experience (feeling) or meaning-making in real-time, a value unto itself (Kolb & Kolb, 2005). Adam spoke directly about the related importance of bridging theory with learning from experience and active experimentation:

The approach that we have taken with u.lab is to create learning environments where people can learn by doing. My involvement includes creating conditions that make it more likely for people to step in, have some sense of what these methods and tools and frameworks are like, and then learn them by actually going out and applying them.

David Kolb does in fact list active experimentation as a critical approach to adult learning, but lists three additional drivers, which PI might use to develop a more comprehensive approach and to analyze the most effective forms of learning for each team. The following learning style preferences yield numerous insights into the balance required for in-depth learning. These include (Kolb & Kolb, 2005):
1. **Concrete Experience**: learning from specific experience, being sensitive to feelings and people

2. **Remote Observation**: Observing before making judgments, viewing issues from different perspectives, looking for the meaning of things

3. **Abstract Conceptualization**: Logically analyzing ideas, planning systematically, acting on an intellectual basis

4. **Active Experimentation**: Learning through “hands on” activities, dealing with people and events through action

The web can be leveraged in ways that allow PI to offer comprehensive learning opportunities that engage learners from the inside-out; that is, in a fashion that is learner-centered and grounded in adult learning theory and practice.

I wanted to hear more from Adam about where in the theory most people get stuck or have a misunderstanding. I asked, “Sometimes when I teach theory, there tends to be a common area of confusion or misunderstanding. With Theory U, what do you typically see as a primary source of confusion?” Adam’s response was very telling, as it focused on two particular areas of misunderstanding. The first pertains to how the first three levels of listening are more readily understood than the fourth. To refresh, Level One listening refers to **Habitual Listening**, where your focus is on confirming the thoughts and opinions you already have. Level Two includes **Factual Listening**, where you listen for something new from the actual person, which might in fact disconfirm what you already know. Level Three, **Empathic Listening**, occurs when you truly begin to see the situation from the other person’s view, utilizing your heart to feel into where they are coming from. Level Four, which Adam believes may be the most difficult to comprehend includes **Generative Listening**, which occurs when, “Your listening happens from and holds the space for something essential to become present or to manifest. Time slows down, and the boundary between you and the other begins to collapse” (Scharmer, 2018, p. 12). Adam shared,

It seems to me that people in ULab tend to have a little confusion around the levels of listening and particularly the articulation of the deeper levels; level four especially. We created a listening self-assessment on our website where people reflect at the end of the day on how much time they spend in each level of listening. What often comes up is people say they spend 25% of their day in level four listening. To me level four listening is about a complete shift in identity. So, if you just break it down – that’s like four hours of waking time where you feel like your identity is maybe fluid and shifting. So I don’t think that level four listening is fully understood. The good thing is that people are beginning to understand a distinction in how they pay attention; and that is really more
important than how much time you spend in each level. What’s important is that you can
learn that there are different ways of paying attention. But in terms of where confusion
happens, Level Four listening may be more of a rare phenomenon than people think it is.

A second area of confusion becomes evident when people begin transitioning from the bottom of
the U into prototyping.

To me one of the most intriguing parts of the U process, as I understood it through my
own experience when I first got involved ten or so years ago and still to this day, is this
transition from the bottom of the U up into prototyping, crystallizing, and actually taking
action in the world. Otto and Ken Wilber did an interview one time back around 2003,
in which they discussed the transition between the experience of Presencing and action
in the world. Their emphasis was more about bringing the future into the present. What
I’ve seen happen is that people go through a deep inner transformation journey, where
they start to connect with a new sense of possibility and then… old frameworks, old
mindsets, the old ways of being tend to reestablish themselves. PII think this distinction
about staying in tune to what is wanting to happen and how to actually do that is
one of the most interesting parts of the U process, and a part that I feel is often
underemphasized.

Here is where my previous reflection on Loosely Coupled Systems and Adam’s discussion around
the impact of scaling come together to produce a potential solution. In any functionalist or capitalist
society, it may be said that there is an imbalance between learning by doing and learning by thinking,
with a stronger emphasis on doing. A productivity focus may compel Theory U practitioners to skip or
skimp on transition from the bottom of the U, where abstract conceptualization is emphasized, and rapid
prototyping, where active experimentation and concrete experience are emphasized. On a large scale, one
way to encourage practitioners to dwell at the bottom of the U might be melding a learning diagnostic
tool like Kolb’s Learning Style Inventory (Kolb, 2007) with Social Network Analysis (Burke, 2014), to
determine which teams in PI social network are more likely to have difficulty with transitioning from the
bottom of the U. This would allow for PI to provide targeted educational opportunities to particular
members of PI community that are more likely to experience difficulty not only during this transition, but
at any transition point in the U process.

I also thought it would be interesting to ask how people who run PI turn the U process
inward upon themselves for strategic planning and improvement. I asked Adam “At some
point your team must engage in the U process itself. So, what is it like to sense into the future on your team? What is arising for you at this moment in the advancement of your work?” Adam replied: It's an interesting question. I mean the answer might surprise you a little bit. We certainly do use the practices and methods as they are written out. But also, in reality the process is more fluid than that in terms of how we use it internally. And where we are, at least in my work that I’m helping to oversee and lead, is at an interesting place. I guess one way of framing it is not how we support innovation within social systems, but what are the infrastructures that are needed to actually transform the systems themselves. And there isn't really a clear roadmap for how to do that or how to even build a project or initiative that supports that. So our process on the inside can often feel kind of chaotic and emergent. We engage in an interplay between sensing into what we feel is needed in the world and what needs to happen and then putting quite a lot of things out there and seeing where the feedback comes from. Where our key partners have energy. What’s really resonating with that?

Thinking back on Adam’s answer, I thought about how this group of people shares a very unique set of characteristics. Those that come to mind are that 1) they are all expert-level practitioners with a deep grasp on the U process; 2) perhaps more than any other team, they practice presencing informally, across everything they do (perhaps to the point where it is habitual); and 3) their charge, unlike other U teams, is to steer what they refer to as Mundo level initiatives, in which ambiguity looms large. If anyone outside of the institute were to be a fly on their wall the process may indeed seem chaotic. This drums up a question around whether there is a unique, implicit team development process that PI leaders have experienced. It would be fascinating to tap into that tacit knowledge and incorporate it as a lesson in how teams can move from a more mechanical application of the U process, to one that is more embodied, ever-present and emerging. It is hard to imagine that this would come easily for most people who require greater structure.

Adam continued,

If we put ten ideas out there, maybe there are three that people really latch onto and say, ‘Yeah, this is what's needed.’ We then tend to move toward amplifying those ideas. Within a team, it's challenging to work that way because it can feel like there's a sort of lack of structure, such that what we were playing with last week is no longer relevant this week. But that’s the challenge of working emergent programs into the emergent needs of the world. How do we balance that dynamic of seeing what key partners have energy around and also looking at our own internal capacity to deliver on that?
With regard to key partners and what is currently resonating, I asked Adam about what types of energies are sprouting up for the Presencing institute. Adam shared, It’s recognition that given the urgency of the environmental and social challenges that we face there's a need to move beyond team-based projects to innovation ecosystems. Maybe we don't have quite the perfect framing for it just yet. What does it actually look like in practice to help people collaborate across boundaries or work towards a greater common good while still being mindful of and working towards the objectives and needs of their own organization? So there is a sort of sense that we have to collaborate in new ways. We have to create these ecosystems and transformations locally in different parts of the world but how to do that feels like a frontier. It is unclear to many people.

Given my earlier reflections around developing superordinate goals and setting conditions for healthy intragroup dynamics, principles such as Decategorization, Recategorization, and Mutual Differentiation can be applied to the online case studies that demonstrate how people connect their collaborative objectives with those they need to satisfy in their organization. It may also be helpful to translate these processes into a toolkit.

Adam concluded by sharing the way programs are serving a greater sense of purpose.

The programs I’m currently working on ask: “how do we actually begin to work less from our own kind of organizational and personal boundaries and more kind of on behalf of something that is the greater good?” The sweet spot is not to stay utopian and idealistic, but where the rubber hits the road and things become practical. We’re also still trying to figure out how best to design these programs. It’s an evolving, iterative process.

As Otto, Adam and others at the Presencing Institute continue to champion Theory U and cross-organizational initiatives such as u.lab-S, what is clear that we must all strive to engage in presencing throughout all of our interactions, perhaps to the point where, paradoxically, it becomes habitual. Teams and larger connected initiatives, if appropriately diagnosed and sustained as Loosely Coupled Systems will help the Presencing Institute contribute to a society that strikes a balance between universal and local appeal. As most global change initiatives require a balance between standardization and customization for local needs, a core strength that must be exhibited is one that Otto, Adam and the rest of their team already embody: the ability to weave the original intention of the institute through everything they do and building this social field outward, strategically, and with patience. It would be one thing for Otto and Adam to ask that readers trust in the process. What is more powerful, clearly, is their ability to model this trust.
References


