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FEATURE ARTICLES

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Contents

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Editorial

Journal of Awareness-Based Systems Change:

The Birth of a Journal

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Responding to Our Global Moment

The launch of this journal happens at a critical juncture of human development: at the global peak of the COVID-19 pandemic and in the midst of an era often framed as the Anthropocene (Crutzen, 2006), a term which highlights human responsibility for the current self-inflicted socio-ecological challenges and wicked problems we collectively face. Launching this first issue of the *Journal of Awareness-Based Systems Change* marks an important milestone on a collective and global learning journey driven by a deeper intention and firm belief that it is possible to address the ecological, social, and inner divides of our time and create results that serve the wellbeing of all. It is born of a desire to support and amplify this intention by providing a platform to make visible and accessible the growing knowledge base that supports societal transformation across these divides through awareness-based systems change. We recognize that we cannot democratize the "know-how" that underlies this work until we can illuminate and

articulate what is happening in deep systems change[1] and how it happens, and then make that knowledge widely available. Thus, research has a key role to play in our collective moment of disruption, transformation, and the renewal of civil society.

Underlying the transformative demand of our current moment is a broader transformative imperative of which we are a part: the need to transform science and social science itself (e.g. Schneidewind et al., 2016; Fazey at al., 2016). As Temper, McGarry & Weber (2019) observe, "the role of science and knowledge production is (...) at a crossroads" (p. 1). Many of our dominant forms of knowledge production with their embedded and established protocols, methods, and discourses stem from an overt western and colonializing focus on rational thought. As Melanie Goodchild points out in this issue, it is out of epistemic violence and ignorance that these forms of knowledge production have themselves contributed to the marginalization and silencing of Indigenous and other forms of knowing that draw from a wider array of complementary epistemologies and (participative) worldviews. Attempts at transforming science in response to intractable global challenges are a feature of many current research initiatives (see, for example, https://oneoceanhub.org/). These include disconnected norms and legal frameworks, disconnected science due to limited holistic understanding, and disconnected dialogue across sectors and communities. These contribute both to poor science-policy interface and a lack of consideration of the role of different knowledge systems.

Origins and Intention of the Journal

Even though the intention at the launch of this journal is clear, it's not the result of a deliberate strategic plan. Rather, the idea for the journal emerged at the inaugural Social Field Summer School, hosted by the Presencing Institute (PI) in Berlin, June 2019. The practices of co-inquiry, dialogue, social art practices, and relationship-building were a core feature of this gathering of researchers, students, artists, practitioners, and pracademics (those working at the intersections of practice and research) from 23 different countries. Each had responded to an invitation from PI that was both open and bold: to co-initiate a journey, over the course of the next decade, that would foster a global community who would co-develop and evolve the concepts, methods, tools, and frames needed to advance the field of awareness-based systems change. *Awareness-based systems change* is an emergent cross-sectoral, inter- and transdisciplinary field and body of knowing. It draws upon theoretical and practical foundations that

[1] *Deep systems change* implies a shift towards a social field perspective of systems change. This perspective emphasizes the source conditions that give rise to patterns of thinking, conversing, and organizing in systems which, in turn, produce practical results. By including the interiority of the system (first- and second-person experience), a social field perspective addresses the less visible dimensions of social reality creation.

connect awareness-based approaches to individual and collective transformation to effect systems change. Much of the work, especially in this inaugural issue, acknowledges the foundational work of Theory U (Senge et al., 2008; Scharmer, 2016, 2018; Scharmer & Kaufer, 2013, 2015) in shaping and delineating this field.

As became visible to those gathered at the summer school, such an undertaking involves navigating a plethora of tensions and complexities, dealing in parallel with what easily appear to be conflicting rationalities, e.g., the classical question of serving either rigor or relevance, theory or practice, and criticality or creativity. Additionally, many of us involved in this work have traditionally approached it from the edges, be it in relation to our position within (academic) institutions and/or in relation to what constitutes mainstream and legitimized knowledge and practice in our respective disciplines or fields of work. People describe the experience of seeking niches, cracks, or openings that would allow them to position innovative awareness-based practices and frameworks as credible and sustainable approaches to effect systems change. In trying to hold these tensions, rather than seeking to resolve them, the idea of birthing a new journal came to life. As a rigorous *and* relevant, theoretical *and* practical, as well as critical *and* creative response to this challenge, it is the intention of the Journal of Awareness-Based Systems Change to hold and provide a space for a much-needed trans-disciplinary playing field to support and advance systems change.

Absencing and Presencing: Interconnected Phenomena

While in this past year we have witnessed global life-affirming resurgences, such as the Black Lives Matter Movement, this moment also highlights the interconnected relationship between what is referred to in Theory U as Absencing and Presencing. Within this theoretical framework, Presencing and Absencing represent two opposing but interconnected cycles of social-reality creation, and the tension between them "is played out across all sectors and systems of society today" (Scharmer & Käufer 2013, p. 33). While the Presencing cycle sees individuals and collectives attending to the full potential of a present moment and starting to act from a place of deepened awareness and unmediated connection to that field of future possibility, the Absencing cycle leads through a trajectory of rational denial, emotional disconnection, agentic delusion towards—in its worst case—destruction and self-destruction. For Cox (2014), Absencing represents "systemic forms of in-built resistance designed to avoid consciously experiencing and sharing the interpersonal risks inherent in creating *a necessary condition* for this emergence to occur, i.e. creating a conversational field in which our emotional vulnerability to each other is both acknowledged and felt" (p. 30). Including Absencing in our systems change work, requires us to also engage actively with the conflict dimension of transformation and to address issues such as "structural inertia, power, inequality, vested economic interests, denialism,

resistance to change, and anxieties" (Boström et al. 2018, p. 2) that stand at the heart of the wickedness of our current socio-ecological challenges.

As a journal, we are deeply committed to including theoretical accounts and practical examples that intentionally speak to both sides of the Absencing-Presencing spectrum. The intention of our journey is thus multi-fold: We want to support an expanded epistemological approach to research and practice, including the capacity to inform action from a variety of forms of knowing. We aim to further develop the tools, methods, and frameworks to strengthen the capacity in individuals and systems to sense and actualize emerging potentials, and, finally, we are committed to a deeper inquiry into how we can make visible and engage the phenomenon and workings of Absencing in ways that are emancipatory and transformative. In order for these aspirations to be brought to life we are convinced that we need to find ways that allow for a multitude of voices and ways of knowing to come together under one roof, to have diverging views and to explore what this means for our understanding and the practice of awareness-based systems change.

Peer-Reviewed Papers through the Lens of an Expanded Epistemology

Through a variety of formats, we aim to make visible work that is breaking new ground. In doing so, we aim to support the evolution of new knowledge arising from an expanded epistemology that includes cognitive, emotional-relational, embodied, and spiritual-intuitive knowing. Further, this epistemology is derived from, embedded in, and of service to, practice. Each of the original and peer-reviewed articles in this first issue draw from and reflect upon different forms of knowing. Instead of giving a short description of each contribution, we instead want to highlight how multiple epistemologies are deeply interwoven into each of them. To that end, we use Heron & Reason's (1997) seminal differentiation of propositional, experiential, presentational, and practical knowing as a frame for describing these works:

All peer-reviewed articles in this issue are examples of Propositional knowing, which derives from the mastery of concepts and theories. The articles draw upon and make connections between a wide variety of theoretical bodies and lines of work foundational for a deeper conceptual grounding of awareness-based systems change. Jessica Bockler locates and maps the seven stages of Theory U onto the three core streams of consciousness discussed within transpersonal psychology. Kazuma Matoba grounds the awareness-based approach of Global Social Witnessing within Levinas' relational philosophy. Ricardo Goncalves & Arawana Hayashi further develop Christopher Alexander's (1977) ideas of an architectonic pattern language for an embodied, visual, and verbal language for social groups to describe and reflect on social field shifts. Melanie Goodchild utilizes the two-row wampum of the Haudenosaunee as a model of epistemological *non-interference* in cross-cultural research.

Experiential knowing represents our intersubjective sense of being relationally bound to and able to resonate with other persons, but also with other life-giving and affirming (non-human) forces, energies, entities, processes, and things. This form of knowing is also evident in all contributions. In Kazuma Matoba's paper it is our primordial relatedness to the Other which breaks with dominant ideas concerning the autonomous and self-sufficient individual. For Ricardo Goncalves & Arawana Hayashi it is within the feeling of our bodies that we are corporeally and relationally connected, not just to a deeper and holistic embodied wisdom, but also to intangible qualities of our social systems. Jessica Bockler posits that coming into a relationship with and integrating the various deeper, collective streams of consciousness is a prerequisite in becoming more intentionally and co-creatively embedded human beings. Finally, Melanie Goodchild, in reaffirming Indigenous wisdom traditions, highlights the need to address and honor the temporal (the past, the present, and the future), the tangible and intangible (spirit), as well as the living (human and non-human alike) in order to fully arrive at a whole-systems perspective.

Presentational knowing—which stands for the myriad of receptive, expressive, and often artistic spatio-temporal forms and modes of imagery and co-creation in and through which we enact, share, and communicate our sense of connectedness—is also reflected in each article. Jessica Bockler shows how it is through various playful creative and contemplative techniques that we expand and cultivate our ability to notice and express our moment-to-moment experience and shift beyond mere ego-driven modes of functioning. Kazuma Matoba speaks both to the desensitizing but also potentially connecting qualities of media, art, and artifacts to witness and empathize with global social events and, as a result, engage more consciously in pro-social behavior. Through the use of the two-column technique as an expressive and poetic form of cross-cultural communication, Melanie Goodchild confronts us with our own habits of thought and ways of meaning-making and invites us to consciously re-read across the lines to encounter the existence of a multiplicity of ways of doing and interpreting things. Vividly, Ricardo Goncalves & Arawana Hayashi provide us with a fresh aesthetic and immediate, relational language which supports us in describing our seen, felt, and sensed experiences to arrive at wider perspectives from which to base action.

Lastly, all articles capture and contribute to the expansion of our practical and experiential knowing, or knowing-in-action. They support the evolving mastery of practice in concrete and tangible ways across different contexts, fields, cultures, and disciplines working towards systems change. In doing so, they articulate the foundational task of awareness-based systems change to resonate more deeply with our world and exemplify what Scharmer (2019) has called Vertical Transformation Literacy: the ability to shift consciousness from ego-system to eco-system awareness. Shifting to an ecosystem perspective depends on our capacity to consciously draw on and integrate different ways of knowing that enable transformed and future-oriented ways of being, thinking, and doing in service of the wellbeing of all to become reality.

Innovative Formats as Reflection of Our Intention

In addition to original, peer-reviewed articles, you will find other sections and types of submissions in the Journal of Awareness-Based Systems Change. The format of the journal is, itself, the result of an intense and unfinished dialogic and iterative process amongst the members of the editorial team and many other collaborators and co-conspirators.[2] Through the feedback we hope to receive, both from you as readers and through the members of our Editorial Board, we plan to further refine and iterate the journal in the issues to come, with the second of these scheduled for September 2021.

In order to bring our intention to life, we are convinced that we need to ask new kinds of questions and co-inquire into these. Therefore, in addition to the innovative work represented in the articles mentioned above, we introduce new types of contributions here. In this and forthcoming issues, you will find three additional features. In "Commentaries from the field", we invite renowned scholars and change makers with deep experience working to bring awareness-based approaches to systems change, to make positional or essayistic contributions to the journal. Through these contributions, we aim to make visible the transformational work happening in different contexts and highlight questions and further points of connection that the field of awareness-based systems change needs to further pursue. In this first issue, Vanesa Weyrauch, who is a member of our international and esteemed Editorial Board, draws upon her experience in the field of development work. She describes the current overreliance of funding streams on third-person methods and tools centered on visible processes and measurable outcomes. Further, she shares her experience-based observation that all too often these approaches fall short because they fail to tap deeply enough in the cultural spheres of first- and second-person knowing to address the less visible systemic levels that underlie symptoms.

The second addition is a section we have called "In the Making". We believe new understandings will surface through emerging patterns which become visible across a range of place-based and viable solutions in diverse fields of research and practice. Even though what had been framed as the post-heroic turn in leadership studies now already dates back more than two decades (e.g., Goleman, 1998), we still see a tendency to present the results and outcomes of initiatives which seek to address complex issues in overtly polished ways. Seldom is the whole story actually told, and also, such ways of showcasing downplay the significance and necessity of individual and collective actors grappling with the

[2] People who have thus far (apart from the work of the Editorial Team and Editorial Board) contributed to the emergence of the Journal in its current form include (in alphabetical order): Sarina Bouwhuis, Jayne Bryant, Kelvy Bird, Kirsi Hakio, Lukas Herrmann, Els Laenens, Uri Noy-Meir, Keira Oliver, Rebecca Paradiso de Sayu, Monique Potts, Javier Ruiz, Janice Spadafore, Godelieve Spas, John Stubley, and Katie Stubley.

messiness inherent in coming to terms and making sense in and out of complexity. We believe this is another important necessity of our time and moment: to collectively explore the process of transformation from an awareness-based perspective in ways that make the sense- and meaning-making process visible. We invite researchers and practitioners to share ideas as work is in progress and invite commentary, thus moving the transformation process 'in front of the curtain'. In this first issue Eva Pomeroy, Lukas Herrmann, Sebastian Jung, Els Laenens, Laura Pastorini, and Angelique Ruiter describe their role as embedded researchers in the Presencing Institute's GAIA initiative and propose a framework which integrates relational, intuitive, and aesthetic forms of knowing in order to equally serve action in emergent processes, as well as generate widely applicable knowledge. Instead of an anonymized peer-review process, each "In the Making" will be paired with a discussant, speaking equally to the authors and the intention of the contribution, as well as pointing towards further potential points of connection for a larger audience. As a discussant for this first issue, Patricia Wilson reaffirms and encourages the author collective to further thicken and enrich their descriptions around the aspect of holistic and intuitive intersubjective second-person knowing and points towards a model to incorporate a broader and post-positivistic understanding of validity in action research.

Lastly, we introduce the section "In Dialogue". The *Journal of Awareness-Based Systems Change* believes in the importance of exemplifying the essence of generative dialogic practice: surfacing tacit knowledge and making assumptions visible within a community of co-inquirers. As such, the final format will showcase forms of collective co-inquiry into foundational questions and key aspects of awareness-based systems change within and across related approaches and fields in and through the practice of Dialogue. In this issue, founding faculty of the Presencing Institute who co-shaped the tools and practices that form the foundation of Theory U are invited to dialogue by Julie Arts & Angela Baldini. They describe the origins of key sensing practices and explore the inner experience of holding them that is at the root of their effectiveness as awareness-based systems change tools.

We subtitled this editorial "the birth of a journal". Whilst the process of giving birth to this first offspring took a while longer than the human nine-month cycle, we feel nonetheless proud to now officially introduce it to a larger audience. We invite you to allow the different formats of this journal to engage your open mind, open heart, and open will alike, and to join with us in our collective inquiry into the tensions and promises of awareness-based systems change as a way to respond to the planetary emergency of our time by activating, rather than disabling, the full potential of human agency and ecosystem wellbeing.

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Commentary from the Field

Questions as a Lighthouse:

How This Journal Can Contribute to New Ways Forward in the Development Field

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When I received an invitation to be part of the Editorial Board of this journal, I celebrated its promising and much-needed birth. I have worked for the past 20 years in the field that promotes a better interaction between evidence and policy, including work with think tanks, national and international NGOs, universities and government agencies, particularly in Latin America, but also in Africa, Eastern Europe and Asia.

As a result of these experiences, I arrived at the conclusion that development initiatives that have prioritized rational approaches to change have failed to solve complex problems. It is true that we have made advances in development: on average, we live longer, have higher salaries, are better educated, and have more political stability than ever before. However, we have failed to build the leadership and institutions that can address wicked problems under pressure and at scale. The investment in infrastructure so far is relevant but not sufficient to develop and build systems of high capacity (Andrews et al., 2017). Unfortunately, we see that many countries are still not able to perform some of their basic functions for the benefit of their citizens. Once a country is stuck, to continue doing what has been done in the past won't work. Or as Einstein so

clearly stated: “We cannot solve our problems with the same level of thinking that created them”. The need to revisit our theories and practices to enable change is evident, even when funders continue to support projects that deliver the same type of results due to the same type of approaches. One of the main challenges is that projects focus solely on the symptoms (poverty, inequality, environmental disasters, etc.) and do not go deeper to explore the causes of those symptoms, which are what this journal calls “the deeper structures of the social systems—the source conditions—in order to see, sense and shift them.”

So, how can we go deeper and generate a new operational system? This is not at all easy. It implies taking risks and embracing uncertainty. My organization, P&I, was born in 2012 as *Politics & Ideas*: a joint initiative of researchers and practitioners to co-produce and share innovative knowledge and support evidence-informed public policies for the wellbeing of all. By the end of 2019, based on what we learned by working with diverse stakeholders in the evidence and policy ecosystem, we decided to expand our focus and complement our existing research and knowledge creation with other ways to generate ideas that can inspire new actions for the good of all, including awareness-based approaches. Thus, in 2020 we re-founded ourselves as *Purpose & Ideas*. We are convinced it is time to further explore approaches that integrate the body and heart and mind to collectively frame problems and co-create solutions towards sustainable wellbeing for our communities. However, to tell others stakeholders why and how we plan to work differently—from our inner source—is a highly challenging task. We believe the path would be smoother if we were able to support, with more evidence of its effectiveness, the type of work and approaches we are trying to promote.

During the last two decades of work, members of P&I have encountered several wicked problems while supporting think tanks and government agencies in their efforts to transform their organizations in order to contribute to better public policies through the use of research-based evidence. However, most of the strategic, monitoring, and evaluation plans that we co-developed fell short of their original intentions—despite being based in thoughtful and elaborate approaches and emerging from real group work and consensus. Further, as contractors, we found it challenging to engage in honest discussion with funders about failure, which is critical for experimentation, as funders typically reward only success stories and withdraw funding from ‘failures’ (Woolcock and Bridges, 2019).

Why was that happening? We decided to try and understand this a bit better. To that end, in 2016, we partnered with INASP, an international development organization based in the UK, to co-create a systemic framework called “Context Matters”, which is a participatory tool to help detect and understand the best entry points for improving the use of knowledge in public agencies. This framework builds on the experience of 50+ policymakers and practitioners and has been piloted with government agencies in Peru and Ghana and international non-governmental organizations such as UNICEF. With this

tool, we aimed to look both at the organization itself (internal factors) and the broader political economy (external factors) that can affect the use of knowledge in policy decisions. It addresses visible changes, such as new processes, policies and behaviours, and invisible changes, such as shifts in motivation, attitudes, and overall culture around knowledge use.

However, when trying to apply the tool with teams across the world, we find that the preferred solutions and approaches to deal with change focus primarily on the use of the mind and rational and linear approaches. Delving into personal and cultural change that taps into how an organization, a team, or a person perceive themselves and their values is regarded as a long-range effort that usually falls outside the scope of concrete short-term funded projects. Thus, the change plans that resulted from these processes were centered in visible activities and processes that coordinators and managers could develop and measure. Or as put by Wilber and Watkins (2015), the chosen way is to focus on "it" solutions: those that can be objectively seen and measured. But the challenges faced are not so easy to identify, they are invisible and mostly belong to our individual and collective internal dimensions. Hence, outer transformation should be underpinned by inner transformation. To become aware of and change *the inner place* from which we operate, we need to integrate mind, body and heart. In Scharmer's (2016) words, "it´s not only *what* leaders do and *how* they do it, but their 'interior condition,' that is, the inner place from which they operate—the source and quality of their attention."

Thus, we are eager to co-produce, receive, and apply research-based evidence, and to foster global discussions on how cultivating the interior condition through awareness-based systems change approaches, such as Theory U under the Presencing Institute, Reinventing organizations by Frederic Laloux, and The Conscious Business approach by Peter Matthies, can contribute to innovative ways of addressing challenges in development projects. In that sense, we believe that this journal has significant potential to systematize and make more visible and accessible the knowledge needed to promote systemic change in a conscious way.

We have a couple of key questions that could guide our inquiry going forward:

- How can the potential of mind be expanded by also including the heart and body to define development problems and co-create collective solutions?
- How are leaders of development projects currently using awareness-based systems change approaches to tackle development challenges?
- How have these approaches tangibly contributed to positive results in development projects? Can this be better and further monitored and evaluated?

- Could development players revisit current theories of change (and theories on how monitoring and evaluation is applied) by incorporating these types of approaches?

Even though awareness-based systems change approaches are increasingly generating interest and respect among think tanks, government agencies, and funders, there is more work to do to make a stronger case for how they can contribute to a radically new way of thinking so that we do not end up with the same results. To inspire the development community to try out awareness-based approaches, I believe we need to generate promising and solid changes at the level of knowledge, awareness, interest, and behaviours in our field. Some of these changes could be:

- Generation of novel evidence demonstrating how integrating mind, body, and heart can lead to valuable and sustainable outcomes in development projects.
- Increased awareness of why we need to expand the potential of the mind in the way we define problems and collectively produce potential solutions.
- Informed debates on the current challenges and limitations of traditional approaches to development projects and the potential contribution of awareness-based systems change methods and theories.
- New relationships among key stakeholders who seek to try these approaches, that go beyond rational and technical solutions, on recurrent challenges.
- An emergent community of development stakeholders interested in supporting awareness-based approaches for development projects.
- New beliefs and attitudes among a new generation of leaders who want to think and act differently in development.

In 2020, the level of uncertainty and not knowing brought by COVID have paved the way to the emergence of new voices and approaches that have been underestimated or neglected for a long time. 2021 is just starting and holds the promise of using what we have learned and what we still need to learn as a lighthouse to guide us forward. A new world may emerge from these critical and tumultuous times. This journal has the potential to shed light onto this promise and make new ways forward more accessible to those who have been waiting for them.

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Peer-Reviewed Article

Presencing with Soul:

Transpersonal Perspectives on Awareness-Based Social Change Practice

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Keywords
presencing, consciousness, transpersonal psychology, active imagination, spiritual practice, social change

Abstract
In the spring of 2020, I joined the GAIA initiative, an "impromptu global infrastructure for sense-making, for leaning into our current moment of disruption and letting this moment move us toward civilizational renewal" (Presencing Institute, 2020). Facilitated by the Presencing Institute, GAIA intended to galvanise global intention and action, by initiating a collective presencing process that aimed to shift participants from ego-system to eco-system awareness. Some 10,000 people joined a series of online sessions with the help of video conferencing technology, jointly engaging in mindfulness and contemplative practices, reflective and expressive writing, Social Presencing Theater, and visual art practice. The journey was informed by Theory U (Scharmer, 2018), an awareness-based social change methodology consisting of

the seven stages of presencing, which invite the suspension of habitual perception, thought, and action to foster deeper levels of awareness and knowing. The term presencing combines *sensing* (feeling into possibilities) and *presence* (being in the present moment). The aim of Theory U is to enable practitioners to come into conscious relationship with the "deeper *source* level" (Scharmer & Käufer, 2013, p. 18) from which they act, helping them to notice the invisible roots of dysfunctional social patterns and systems, to acknowledge and relinquish them, and to co-create new pathways and structures that may aid profound societal transformation.

In this paper, I relate to Theory U through the lenses of transpersonal psychology and consciousness studies to illuminate the deeper dynamics at work. Doing so, I address such questions as: What happens in consciousness when we practice presencing, working in person or online? What might it mean to 'connect to the source level'? What may be cornerstones of safe and effective practice? And how can presencing practitioners cultivate their capacities to facilitate this work?

In the first part of the paper, I map the seven stages of Theory U onto three core streams of consciousness that inform the human experience, reflecting on the features and qualities of each stream, and considering what psychosomatic dynamics may be at play as we enact the trajectory of the U. In depicting the three streams of consciousness, I highlight some of the challenges presencing presents, suggesting that it is, in essence, a depth-psychological and spiritual approach. In the second part of the paper, I explore the practical and ethical implications of presencing, considering what capacities and attitudes may need to be nurtured in practitioners to support skillful facilitation and enactment of the U process. I also consider what frameworks could be deployed to facilitate safe and effective practice.

Presencing and Streams of Consciousness

In psychology, a range of models have been put forward which embrace the idea that there are several concurrent streams of consciousness. The first can be described as a stream serving the emergence of the personal *self* (Assagioli, 1993) or *ego* (Jung, 1995), generating the I-narrative (Lancaster, 2004) or *primary process* (Mindell, 2002). It gives rise to our ordinary sense of self marked by feelings of a continuous, independent, and unique identity. On a collective level, this stream of consciousness constellates our *consensus reality* (Mindell, 2016), the familiar world we inhabit and share with other people day-to-day.

The second stream of consciousness, or *secondary process* (Mindell, 2002), serves the unfolding of another, deeper *intentionality* (Lancaster, 2004). The depictions transpersonal psychologists have provided of this second stream are complex, yet all move beyond the sphere of the individual in some way and towards the collective—the *archetypal* (Jung, 1995), the *universal* (Grof, 1993), and the *interconnected* (Wright, 1998). Many feature the notion of a *higher self*

(Assagioli, 1993; Washburn, 1995), *transpersonal self* (Rowan, 1993), or *soul* (Wilber, 2000). This transpersonal self is embedded in the world at large, relating individual experience to a deeper, beyond-human reality. We might comprehend the first and second level of consciousness by evoking the metaphor of trees: Rising seemingly independent above the ground, they are enlivened by a profoundly interconnected network of roots below the ground which links them seamlessly into the larger web of life.

Some scholars further distinguish the first and second stream of consciousness from a third, described by Mindell (2016) as the level of *sentient essence*, and inhabited by the *cosmic self* (Heron, 1988) or (Wilber, 2000). This stream or level of consciousness is described as non-local and non-dual (Mindell, 2016). Spiritual traditions relate that at this level the dichotomies that shape our normal experience have been transcended, and there is but a profound sense of oneness with all that is. This level, although more ineffable than effable, is explored in transpersonal psychology with reference to schools of non-dual mysticism (e.g. Wilber, 2000) and quantum theory (e.g. Mindell, 2004).

The second and third streams of consciousness are mostly imperceptible to the ordinary self and yet transpersonal theories suggest that these streams exert perpetual influence on us - just as trees are shaped by the places in which they grow, influenced by the quality of soil, water, air, and the presence of other life in its myriad forms. The invitation of transpersonal and integral psychologies and their body of practices is to come into relationship with these deeper, unconscious, collective, and more-than-human streams of consciousness, to awaken to them and to integrate them—so that we may become more fully rounded human beings who are more intentionally and co-creatively embedded in the larger web of life. In the following, I consider how practices of the Presencing Institute might relate to these streams of consciousness, illuminating what psychodynamic processes might be at play at each level. I believe that such mapping is not only of theoretical value, but that it has implications for the evolution of practice frameworks and practitioner training - areas on which I will elaborate in the second part of the paper.

Letting Go: Attenuating the First Stream

Presencing involves the enactment of the *U process* (Scharmer, 2018) which entails seven steps or stages designed to enable us to shift from ordinary cognition to a deeper level of awareness. The process begins with a shift from habitual action and thought, *downloading* (1), to *seeing* (2) which invites direct observation of our experience. *Sensing* (3) follows, redirecting attention from the observed to the observer. *Presencing* (4) arises as we enter stillness and silence in the observation of direct experience, giving us the opportunity to "let go of the old" (Scharmer, 2018, p. 24). The principles informing these steps have become refined through Scharmer's discussions with the cognitive scientist Francisco Varela, among others, who was immersed in the study of phenomenology, psychological introspection, and contemplative practice. Along similar lines, I can

relate these initial stages of the U process to the classic discussion of deautomatization in meditative and mystical practices (Deikman, 1966). Drawing on the work of Hartmann (1958), Gill and Brenman (1959), and Rapaport and Gill (1959), Deikman elaborates that in ordinary life we depend much on the automatization of perception, thought, and behaviour. According to Hartman (1958):

> In well-established achievements they [motor apparatuses] function automatically: the Integration of the somatic systems involved in the action is automatized, and so is the integration of the individual mental acts involved in it. With increasing exercise of the action its intermediate steps disappear from consciousness… not only motor behavior but perception and thinking, too, show automatization. (as cited in Deikman, 1966, p. 329)

Deikman suggests that mystical practices that involve contemplation and renunciation enable a reversal of this automatization, "by *reinvesting actions and percepts with attention*" (Deikman, 1966, p. 329). Deautomatization thus refers to a loosening of the psychological patterns that progressively organise and restrict our thinking, perception, and behaviour. According to Deikman (1966), deautomatization can be achieved through contemplation because contemplation invites nonanalytic apprehension: "…discursive thought is banished and the attempt is made to empty the mind of everything except the percept of the object in question" (p. 327). Along similar lines, renunciation involves "freeing oneself from distractions that interfere with the perception of higher realms or more beautiful aspects of existence" (p. 327). Crucially, Deikman asserts, mystical traditions insist that renunciation of worldly attachments and desires must be complete before divine wisdom is revealed.

Reflecting on the cognitive processes at work in spiritual and mystical practices, Lancaster (2004) proposes that they entail "a shift in the focus of attention away from the 'I'-narrative stream and towards that of the deep memory process" (p. 246), reorienting the leading edge of ego consciousness towards increased awareness of what is ordinarily preconscious. In the I-narrative, meaning is focused and singular—a cloud in the sky is just a cloud—whereas in the deep memory process meaning is fluid, ambiguous, dynamic: the cloud is at once a bird and a dragon and yet it is also neither bird nor dragon as it continuously shifts in form.

Lancaster asserts that there are two routes through which the shift from ego to deep memory process can be achieved. One entails attenuation of the emphasis on 'I'—in theology this is referred to as the apophatic path, the path of renunciation, often emphasised in Buddhist traditions. Citing Varela, Scharmer (2018) speaks of it as "*suspension, re-direction and letting go*" (p. 22). According to Lancaster (2004), the other path involves augmenting awareness with associative practice, enabling a conscious dreaming, a reverie, a play with meaning. This is the kataphatic path or way of affirmation. It is emphasised in Jewish language mysticism, for example, where creative play with words comes

to the fore: Here words are deconstructed to their elemental letters, revealing multiple layers of meaning, so that "the 'knots' binding the soul would be loosened" (Lancaster, 2004, p. 242), and the mystic would achieve union with the Active Intellect, the intermediary between the divine and human spheres. Reflecting on such practices from a cognitive perspective, Lancaster (2004) suggests that in human perception, stimulus processing involves a preconscious, associative stage, in which multi-sensorial memory is activated in relation to sense data, before the multiplicity of meaning is narrowed and tagged to the I-narrative. In language mysticism then, the use of kataphatic practices, stimulating imagination and inviting reverie, enables the adept to become aware of this preconscious dynamic and intentionally engage with it.

In presencing practice, which integrates mindfulness, creative arts, and embodied knowing, I see the interplay of the apophatic and kataphatic paths, engaging both attenuation of habitual processes and creative association, with the aim to enable a more expansive state of awareness, in which the practitioner is poised to access the deeper streams of consciousness.

Letting Come: Stepping into the Second Stream

As we enter *presencing* (4), Scharmer (2018) suggests that we cross a threshold, transitioning from 'letting go' to 'letting come'. The crossing of the threshold requires us to suspend our voices of judgement, cynicism, and fear—opening mind, heart, and will. Scharmer (2018) asserts that here we "connect to the surrounding sphere of future potential. The boundary between observer and observed collapses into a space for the future to emerge" (p. 24). Whilst this may sound like a non-dual state such as might be achieved by sustained meditation practice, I wonder whether what might be happening in most presencing processes is that the tight grasp of the ordinary 'I' is loosened and so preconscious materials begin to rise into awareness, as described above. And thus in the step that follows, *crystallizing* (5), these emergent materials begin to guide the way, "As we *let come* and crystallize vision and intention" (p. 24). Scharmer himself notes that in crystallizing "the relationship between the observer and the observed starts to invert" (p. 24)—which is not suggestive of a state of non-dual realisation. What exactly Scharmer's term "observer" means in these depictions of the process is not clear. To me, it seems that the observer (or the process of observing) remains unaffected by the practice. Instead, the shift which presencing practitioners experience may have to do with where observation is focused. I propose that the power reversal which Scharmer describes occurs between the ordinary self, or ego, and the contents of the second stream of consciousness, which according to depth-psychological theory have a life and will of their own. As we let these contents exert their will, observation becomes focused on and serves the unfolding of their intentionality.

Jung used the term *active imagination* to depict the process of engagement with the second stream, and he regarded it as the most important auxiliary which could facilitate dialogue between unconscious and conscious domains of

the psyche and thus lead to a more harmonious and balanced personality. Crucially, unlike Freud who regarded the unconscious as "limited to contents rejected and repressed from consciousness" (Miller, 2004, p. 2), Jung believed the unconscious to be a generative and purposeful guide, "a mysterious landscape of autonomous, teleological intelligence that compensates for, supplements, even opposes [ego] consciousness" (Miller, 2004, p. 2). According to Jung, active imagination unfolds in two stages, the depictions of which seem to resonate with the presencing process. Describing the first stage, "Jung speaks of the need for systematic exercises to eliminate critical attention and produce a vacuum in consciousness" (Chodorow, 1997, p. 10). We have explored this step in the sections above, highlighting the need for "suspension of our rational, critical faculties" (Chodorow, 1997, p. 10), enabling nonanalytic apprehension. Jung also likens this step to the Taoist idea of *wu wei*: "The art of letting things happen, action through non-action, letting go of oneself (…) became for me the key that opens the door to the way. We must be able to let things happen in the psyche" (Jung, 1929, CW 13, para 20).

As the door is opened, the second stage of active imagination begins and the contents of the second stream lead the way, prompting their expression in imagery, movement, sound, or word. The Jungian analyst Arnold Mindell (2002) elaborates on this spontaneous engagement as a *process-oriented meditation*, which he suggests unfolds across the spectrum of sensory and extrasensory channels that are available to humans—from proprioception or bodily feeling, to the visual or to the auditory channel, to movement or kinesthesis, to the relational channel, and to the world channel which signals through synchronicities: meaningful coincidences which appear to relate to our inner experience but have no apparent causal connection. Crucially, Mindell (2002) asserts that we must learn to follow the message arising from the second stream as it switches channels, presenting itself as a dream, a sound, an image, a bodily sensation, or perhaps a synchronicity. He suggests that whilst all the channels are operative all the time, we only occupy some of them consciously. Others transmit signals that do not reach our awareness, as we have learned to ignore and block those channels. As a result, we have blind spots and perceive the deeper stream only partially, even when we make a conscious effort to pay attention. To come into fuller relationship, we must thus learn to be flexible process meditators, cultivating reception through all the channels available to us, by engaging in a range of meditative, contemplative, and creative techniques which expand our ability to notice and express our moment-to-moment experience.

Engagement with what emerges from the second stream of consciousness may not be a comfortable process, as what surfaces is complementary to the perspectives and beliefs held by the ego. It presents a counter-position, a balancing opposite, which can feel truly 'other'. Active imagination invites us to grant this other authority and voice, ultimately to integrate self and other and transcend their opposition through the birthing of a third perspective, a new way of life. Entering a fully-embodied engagement, compelling us to move, enact,

sketch, sculpt, and write, we become expressive artists, making visible the other—and we gradually come into relationship with the larger reality of which we are a/part. According to Jung (1995), our life-long task is to reunite the ego with its superordinate subject, the higher Self, which represents the totality of the psyche and its collective, archetypal ground.

Jung (1995) was keen to distinguish active imagination from fantasy, which he regarded as superficial and escapist. He asserted that fantasy is a conscious invention, serving the ego and complying with conscious expectations. Similarly, Raff (2000) asserts that fantasy never transcends the ego and can lead to ego inflation, illusion, and stagnation:

> …confusing fantasy with imagination, and confounding active imagination with ego manipulation is damaging and at times dangerous. An inability to differentiate fantasy from active imagination precludes a real relationship with the self, and perpetuates the ego's illusions that it alone is of value. (p. 48)

Jung (1995) noted that the process of active imagination, too, is not without its risks, for it may lead to the spontaneous eruption of unconscious contents into the conscious mind, leading to temporary overwhelm. In the light of this, what are the implications for presencing practice? As facilitators and researchers, how can we develop the right capacities to engage safely and effectively with the second stream? And how can we know whether or not we are tapping the second stream of consciousness at all, and not merely indulging in ego-affirming fantasies? I shall address the former questions later on. As to the latter, one indicator of tapping the second stream is *surprise*. The messages that arise from the second stream can feel truly unfamiliar, as they complement our conscious perspective. They may feel like a revelation. Another indicator may be a change in our language, expressing a shift in the locus of our agency: As the 'other' informs our actions, the ego experiences a surrender to this other will, and 'I' no longer drives the action: 'I' lets happen.

Universal Will: Enacting the Third Stream

Active imagination does not end with rational awareness. For the new level of being to endure it must be applied and integrated into daily life. It must be embodied. There is an ethical confrontation (von Franz, 1980), a demand for the new way to be lived and enacted. Along similar lines, Scharmer (2018) proposes that the final stages of the U process require us to explore the future by doing—*prototyping* (6)—and to evolve our practices and infrastructures from the context of the larger eco-system—*performing* (7). Yet these final steps of the U process do not simply seem to imply integration and application of the messages arising from the second stream. Relating his ideas to the teachings of Chinese Zen master Huai-Chin Nan, Scharmer (2018) asserts that "Enacting happens from 'being in dialogue with the universe'" (p. 25) and through "connecting to source" (p. 23)—which, according to Master Nan (in Scharmer & Käufer, 2013), is God,

the Tao from which all originates. Scharmer and Käufer (2013) seem to imply that the U process enables access to what I have called the third stream of consciousness above. In the transpersonal field, writings concerning this third stream are largely informed by Indigenous and esoteric traditions. When Scharmer writes of dialoguing with the universe, is he encouraging us to embrace an esoteric path? If so, what would be the implications of that, for practice and for research? I would like to call on Scharmer to address these questions. Can and should presencing be an active spiritual discipline? My own answer to that would be a resounding yes! To me, vertical literacy - as advocated by Scharmer (e.g. 2020) - implies spiritual literacy. Moreover, I believe in integrative development: The engagement of the second and third streams of consciousness should go hand in hand, on individual and collective levels, so as to enable us to become more integrated and balanced, and thus more capable of enacting the wisdom and intelligence of the Transcendent, whatever you may conceive this to be: Universal intelligence, God, the Tao, Brahman. Below, I begin to unpack what it means to embrace the consequences and responsibilities that this metaphysical position bestows upon us as we endeavour to create, enact, and research spiritually informed social change methodologies.

Questions of ontology and metaphysics continue to rouse disagreement between those working in the discipline of transpersonal psychology. When we evoke notions of a universal intelligence, are we entering the territory of religion and theology? Can and should we adopt and enact transpersonal perspectives without invoking notions of the Transcendent? Some transpersonal psychologists have chosen to adopt an agnostic position (Friedman, 2002; Daniels, 2005). Daniels (2005) asserts, "This does not mean, of course, that we must necessarily deny the reality of the Transcendent, but only that, as transpersonal psychologists, we are limited to exploring the ways in which the Transcendent is experienced phenomenally..." (p. 230). Others have argued that such bracketing is not possible nor desirable (Lancaster, 2002, 2004). As Lancaster (2002) elucidates, many of the practices and traditions which transpersonal psychology explores embrace metaphysics of transcendence, from which they cannot be divorced without being distorted or devalued. A defining feature of the transpersonal "is the assertion that there is a value in transformative experience involving transcendence […] the vertical axis is involved; contact with the Transcendent is instrumental in effecting meaningful transformation" (p. 5). Citing Ferrer (2000), Lancaster (2002) elaborates that there are dangers in an endeavour which focuses solely on the phenomenological examination of experiences of transcendence and transformation. In step with Ferrer (2000), Lancaster (2002) suggests that the *emphasis on experience* may invite

> …*spiritual narcissism* (which includes ego-inflation, self-absorption, and spiritual materialism); *integrative arrestment* (meaning that natural processes through which spiritual realisations are integrated into everyday life are arrested); reductionism of the spiritual into individual inner experience which is at odds with the testimony of the traditions themselves;

> and (emphasising the separation of the 'objects' of experience from the 'subject' having the experience). (p. 9)

I share Lancaster's and Ferrer's concerns. At present, our scientific endeavour is marred by an overbearing materialist paradigm which has either denied the existence of so-called 'anomalous' phenomena or sought to grasp them through reductive, materialist frameworks—with little success. If we embrace the idea that a transcendent dimension infuses our very existence, bracketing such a wellspring from our research may be like trying to make sense of a living body by examining a corpse. As we engage in and evolve presencing and other awareness-based social change methodologies, the challenge lies before us to explicate and operationalise our ideas as best as we can, and to relate them to other maps, integrating and evolving our common knowledge base, whilst honouring the Mystery at the heart of our participatory co-creation—lest we cut ourselves off from the Transcendent Source. To me, awareness-based social change methodologies need to be active spiritual disciplines, serving as vehicles for deeper transformation, and as we engage with these methodologies as such, discernment must not be left behind. We must explicate the implications for theory-building and research. Some, like Anderson and Braud (2011), have already begun this work, evolving research frameworks and methods which integrate skills and practices from our spiritual and wisdom traditions, thus enabling researchers to access and integrate expanded ways of knowing, to enhance research projects in all their facets. These skills and practices include working with intention and attention (developing our witnessing capacities, quieting and slowing); reducing distraction and noise and enabling fuller appreciation of subtle information; and fostering direct, participatory knowing (engaging intuition, empathy, and compassion). These skills also include cultivating nuanced sensory appreciation and imagination through play and creative arts, shifting us "beyond the usual egoic modes of functioning" (Anderson & Braud, 2011, p. 164). The application and integration of these skills has implications for every aspect of a research project—from the ways in which we formulate our research questions, to sampling and data collection, to analysis and the presentation of findings. In the fields of transpersonal and integral psychology, research methods have evolved that specifically cultivate and draw on these skills, such as Intuitive Inquiry (Anderson, 2004) and Organic Inquiry (Clements, 2004).

The ideas and practices outlined by Anderson and Braud (2011) certainly resonate with and complement Theory U and its associated body of arts-based practices. I believe it would be highly fruitful to draw from transpersonal methods, to expand and advance awareness-based social change research. As an applied theatre artist with years of experience in expressive movement, dance, and voice work, I am acutely aware of the potency of creative and embodied methods in revealing and transmuting personal and transpersonal dynamics; and I believe that practices that utilise active imagination and illuminate collective patterns are key to unlocking societal transformation.

So, when we practice presencing, what might it mean to be "in dialogue with the universe" (Scharmer, 2018, p. 25)? Let me give one tentative answer here, by drawing from writers exploring the converging fields of quantum physics, spirituality, and psychology.

Advocating for science as a spiritual practice, Barušs (2007) draws on quantum mechanics to speculate what may be happening when our observations collapse probabilities into singular physical events. It has been widely suggested that consciousness—the act of observation by a conscious agent—may be responsible for the collapse of probabilities into actuality. Barušs (2007), however, argues that "we do not go about our lives deliberately intending particular events to occur" (p. 42), therefore it appears that there may be "hidden variables" that act as "*volitional directives* emerging from a transcendent aspect of reality that determine the actual manifestation of matter upon observation" (p. 42). Barušs' argument is predicated on the idea that there is a domain of reality that transcends our ordinary world but has causal effects on it. Crucially, Barušs asserts that it is a level which we cannot access with our senses. In contrast to Barušs, psychologists Amy and Arnold Mindell (Mindell, 2016) assert that this level can be experienced as

> …subtle tendencies that occur before they can be verbalized, such as a slight tendency to move before actually moving, vague intuitions, and very subtle feelings. These pre-signals or sentient experiences […] are like seeds from which more overt signals and experiences arise. As these sentient experiences emerge, they begin to break up into parts and polarities, expressing themselves in more stable form and through the various sensory-grounded channels. ("Quantum physics and pre-signals" section, para. 3 & 4)

Mindell (2016) describes this level of experience as the *sentient essence* level, relating it to Indigenous and spiritual wisdom traditions which depict unitive and/or nondual states of consciousness. One aspect of sentient essence, Arnold and Amy Mindell suggest, is the *silent force* (Mindell, 2004) or *intentional field* (Mindell, 2016). Amy Mindell (2016) likens the intentional field to a magnetic field, invisible and immeasurable, yet guiding us throughout our lives. When first developing the idea of the intentional field, Arnold Mindell (2004) related it to Sheldrake's (1981) concept of *morphogenetic fields* in biology and Bohm's & Hiley's (1993) description of the *pilot wave* in quantum physics. In their explorations of quantum theory, Bohm & Hiley (1993) had invested the wave function of the electron with a guiding intelligence, which they suggested informed the electron on its path like radar guiding a ship through the sea. Building on these ideas, Mindell (2004) proposed that

> …with expanded awareness, we can become aware, at every moment of the day, that while we inhabit physical bodies, at the same time, there is a kind of intentional field, a buzz around us, that gently moves us in subtle ways but which we usually marginalize. […] To the everyday mind that is very much out of

> touch with quantum wave experiences or the force of silence, this energy appears awesome. […] After we have 'shifted our assemblage point' from the everyday world to the hyperspace of tendencies, the division between the pilot wave and ourselves diminishes until there is no sense of division. In that moment, you don't *do* something; rather you experience it as *getting done*. (pp. 76-77)

Again, we note in the last sentence the shift in agency. Yet here there is no 'other' whose expression we serve. Rather, we are deeply aligned with the intentional field. Studying the qualities of the silent force, Arnold Mindell immersed himself in Aboriginal wisdom and practices, discovering "what the Aborigines have always known: that each feeling we have is intimately connected with directions on the earth" (Mindell, 2016, "Earth and Universe" section, para 2). Mindell now postulates that we are each guided by specific earth-bound directions which act upon our lives like vectors, guiding us to walk particular paths. Mindell calls the sum of all vectors uniquely acting upon each individual the central guiding pattern or Big U—a term which, at face value, feels uncannily resonant with Scharmer's (2018) Theory U. Reading Mindell (2002, 2004, 2007), I perceive the *Big U* as modulating the directional/intentional expression of the individual psyche—and this modulation is perceptible as the psyche is deeply embodied and spatially expressive. As therapists working in somatic and embodied creative disciplines are aware, our feelings and thoughts are displayed through spatial and directional tendencies which are visible in bodily expression and in our language. Therapist and educator Paul Newham (1999) puts it thus: "…the concept of Self remains verbally inarticulate without recourse to spatial metaphor" (p. 31). Crucially, those spatial metaphors are not mere abstract concepts, but embodied and informed by deeper archetypal forces animating our being and sense of self. We are quite literally, through our flesh and bones and blood, directed by the forces of earth and cosmos which inform our sense of self and shape our individual and collective narratives.

In closing this section of the paper, I want to emphasise the overarching earth-bound direction we have taken here, binding ideas of transcendence and immanence in a ouroboros of self-inquiry. Drawing on the alchemical opus, already C.G. Jung wrote of a psychoid reality at the deepest layers of the unconscious, the *unus mundus* where "psyche and nature are not two but one" (Romanyshyn, 2013, p. 38). The psychoid archetype is the *anima mundi*, the soul of the world, which acts as bridge between spirit and matter. Fundamentally then, our work in active imagination and in awareness-based social change is not simply a personal journey we each must take, but a collective and cosmic quest, awakening us to the deeper unfolding of the world and her ecosystems within which we are embedded. A commitment to inner work is also a relational commitment, honouring the participatory nature of our being and compelling us to be of service in the world. And conversely, as we work to be of service in the world, we are called to attend to our inner condition, to become more conscious of

our co-creative powers and potential. As I see it, the challenge that lies before us today is to converge the paths of activism and awakening, to embrace them equally, so that we may come to realise our greater wholeness.

At the heart of the U process, Scharmer (2018) depicts experiencing the crossing of a threshold. There, a subtle shift takes place which Scharmer asserts no one has articulated better than Martin Buber.

> He must sacrifice his puny, unfree will, that is controlled by things and instincts, to his grand will, which quits defined for destined being. Then, he intervenes no more, but at the same time he does not let things merely happen. *He listens to what is emerging from himself, to the course of being in the world; not in order to be supported by it, but in order to bring it to reality as it desires.* (Buber, 1923, in Scharmer, 2018, p. 64, Scharmer's italics)

This surely sounds like an expression of Universal Will - in service of the Transcendent, the third stream of consciousness - whatever you may want to call it! Yet if we aim to engage in such a way, drawing on the deeper streams of consciousness in service of social change, what are the practical and ethical implications? How will we know what stream of consciousness we are tapping and should be tapping to serve a particular context? How may we develop the right capacities and attitudes in practitioners to engage with these deeper streams? And how can we develop our vehicles of practice to catalyse the deepest potential of our work? Whilst practitioners and researchers will likely discuss these questions for years to come, I want to make some initial suggestions below.

Cultivating Presencing Practice

My own work with the deeper streams of consciousness has evolved from my engagement with various forms of Buddhist meditation and Japanese martial arts, as well as theatre, movement, and song work, serving as vehicles for transformation (Bockler, 2011). Traversing the borderlands between the martial arts, performing arts, esoteric arts, and applied social arts, I have learned much about the need to adapt, frame, and scaffold 'sourcing' practice that lends voice to the deeper streams of consciousness, to ensure that it is both safe and evocative. It is my belief that the second and third stream of consciousness serve the unfolding of distinct potentials, and that presencing practice needs to tap the streams in context-specific ways to serve the needs of individuals and groups. In my opinion, the healing of conflict, psychological wounding, and collective trauma is best served through attending to the second stream where otherness constellates and calls for re-integration. The unfolding of universal intelligence and cosmic potential, on the other hand, may be nurtured through contemplative engagement, opening to the third stream. Crucially, as I have indicated above, I believe that the evolution of human consciousness necessitates attending to both streams, to enable us to heal distortions, transcend fragmentation, and fully awaken to and partake in the cosmic whole. Building on the above, I feel that the

following considerations may be beneficial to support the framing and evolution of the U process and other awareness-based social change methodologies.

Receptivity, Deautomatisation and Imaginal Play

The depth of our engagement is predicated on the receptivity the practitioner can muster. Receptivity—the ability to tune into and perceive the stream of information available to us through our sensory and extra-sensory channels—can be enhanced through psychophysical warm-up, balancing silence and stillness with play, bringing greater fluidity to body and mind. Such warm-up is not a mechanical process, but engages the imagination, inviting a curious and embodied attitude. Working on my own, I approach practice playfully and with full attention: Suspending posture or gesture in stillness, then letting a part of the body lead me in movement, then attuning to sound or visual cues or other sensory information, noticing and amplifying that… allowing myself to relax the habitual modes of perception and sense-making. When leading groups off- or online, I invite them to play, letting the body and imagination lead the way—tossing, rolling, and bouncing an imaginary ball, for example, or inviting them to traverse different landscapes or embody weather patterns or material textures, sensing into and enacting each. Such work can help to increase the inner commitment to the presencing process, by raising our psychophysical energy and expanding awareness whilst deautomatising perception and action. Our ability to entrain with what is arising in our experience, and to amplify that, aids the expression of the deeper streams and their intentionality. Such entrainment and amplification do not imply that we are forcing the process—instead, as I have elaborated elsewhere, we are "listening inwardly, patiently, increasing presence, awareness and receptivity, and letting go of the desire to control the outcome" (Bockler, 2011, p. 231). At the same time, we are not losing ourselves in this playful engagement. Process-oriented therapist Arlene Audergon likens the practice to snorkelling:

> It's not like being self-conscious … you're in it and you're conscious at the same time. […] ...it's a bit of a shamanic thing, to dive in … but it's not the same as just diving in and then drowning! You dive in and you are aware, you're conscious inside of it. In process work we used to say it's like having a snorkel. (Audergon, in Bockler, 2011, p. 233)

Psychophysical engagement feels particularly important when we work online. Sitting in front of our computers, we can easily lose touch with the embodied nature of our being and become drawn into the virtual reality tunnel, tuning out the vital information that is calling to us through our many sensory channels. We can stiffen up, lose flexibility, and become passive consumers, merely 'downloading' information, as Scharmer (2018) would put it, and 'absencing' from our deeper experience, becoming stuck in mindless enactment of habitual patterns. In my online sourcing work with groups I often encourage people to stand in front of their computers, to step into an exploration (physically

stepping forward) and to move, inviting the kinaesthetic channel to the fore of their experience, thereby anchoring the sourcing process in the body. The visual and auditory information I provide through the computer act as scaffolding for their own process-meditation which takes the lead. Engaging in such ways—inviting expressive movement alongside stillness and silence, and weaving in spontaneous writing and drawing to enhance expression—I have found that online work can become remarkably potent.

Containment, Presence, and Compassion

With any evocative inner practice, psychological safety is an important concern. Any psychodynamic work requires conducive structure and presence, in order to support the participants who become more open and vulnerable in non-ordinary states of consciousness. It is also vital to contain the energies that rise from the deeper streams, which can at times be fragile and at other times powerful. Whilst the U process is not an initiatory ritual or therapeutic practice, it would be naïve to assume that its trajectory is not evocative—and indeed, we would want it to be! So, how can we take care of participants as they traverse trans-rational streams of consciousness? It seems vital to me that we endeavour to create safe and conducive spaces for the work. Psychological safety is predicated on a sense of confidentiality as well as a sense of feeling seen and acknowledged. Individuals and groups need to feel they are held in secure and compassionate ways, so that they can freely express themselves without feeling judged or exposed. If we take presencing online and dive to greater depths, it feels important to acknowledge the limits of the containers we can provide: Online we are not in control of the physical spaces people find themselves in. We may want to give guidance, suggesting, for example, that participants join online sessions from private spaces, so that practice and reflections are not observed by by-standers in cafés and offices. In smaller groups, working agreements could be made to enhance a group's integrity and commitment. The strength of the psycho-physical container informs the potency of the practice, so these are not trivial points.

Initiatory Structures and Guidance

In Indigenous and esoteric settings, initiatory structures are established to support the transition of participants from an ordinary to a liminal (threshold) state (Turner, 1982), hold them in this liminal state, and then aid their safe return. In transpersonal psychotherapeutic practice which incorporates work with altered states of consciousness, the potency of liminality is also well-recognised, and therapists, like ritual elders, strive to provide adequate containment, enabling immersion as well as subsequent dis-identification from the deeper streams as participants return to ordinary reality (Moore, 2001). For each sourcing practice that I guide in off- and online groups I apply the following structural framework:

- Preparatory guidance (seeding the theme of a session, outlining preparatory work and required props, and advising on group etiquette and privacy)
- Arrival (welcome, recalling session theme, structure, and aims)
- Check-in (meditative or contemplative practice, followed by free drawing or writing, expressing the energetic qualities of the moment, sharing the essence of what has emerged either verbally or via instant messaging)
- Setting intention (bringing the theme or question into focus through a short presentation)
- Psycho-physical warm-up (engaging the whole person as depicted above)
- Establishing the liminal work space through physical actions (e.g. encouraging individuals to create their ritual space by demarcating its boundaries)
- Liminal exploration (flowing through a combination of visualisation, expressive movement and vocal exercises, as well as free writing and sketching, sequenced to serve a particular aim)
- Dis-identifying from and releasing the exploration (stepping out of the liminal space, taking physical actions to dis-identify—for example, by placing emphasis on release through exhalation, brushing off the body with our hands, and using hands and imagination to give the physical space an imaginal clean, and bringing sensory awareness back to the physical space in which we find ourselves)
- Sharing and reflections (an opportunity to share moments of practice—for example through body sculptures or gestures, verbal sharing, or by writing in instant messaging—and ask questions or signal for further support as needed)

Structural requirements and the need for guidance will vary from context to context. Presently, my primary field of practice is transformative learning in higher education. Many of the sessions I facilitate focus on deep immersion in groups of ten to thirty students, supporting their learning journey through embodied, imaginal engagement. Whatever the context, as we employ contemplative, embodied, and creative methods in our work, we need to consider the potency of our practice, and equip ourselves to hold groups effectively and safely. If awareness-based social change methodologies are to grow in their transformative impact, there is no doubt in my mind that facilitators of such work need to evolve conducive practice frameworks, as well as commit to working on themselves, so they grow in their capacity to hold the space for deeper

sourcing processes. To me, this means being present with our own growth process and growing edges in an integrative way, attending to all our human dimensions and their developmental needs, and committing to a way of life that honours our deeper nature and interconnectedness.

Enacting and Living Wholeness

Intellectually, many of us already appreciate the interdependence of all things and all beings on earth and in the cosmos. Yet we need to practice living and enacting our unity and interconnectedness, or else we run the risk of succumbing further to fragmentation, myopia, and tribalism, thereby fuelling social, cultural, and spiritual divides. As integral philosopher and activist Terry Patten (2018) puts it,

> The practice of wholeness is thus ongoing, and pervades every sphere of our lives. It means to enact the health and wholeness of the body, mind, emotions, relations, culture, society, and the entire natural world. It is also about participating consciously and constructively in every dimension of the larger whole. (p. 141)

Together with colleagues from the field of integral psychology, Patten has created a blueprint of integral practice, aiming to meet the needs of our time. *Integral life practice* (Wilber, Patten, Leonard & Morelli, 2008) takes a modular approach, suggesting that we need to commit to tangible practices across at least four core domains of our being—body, mind, spirit, and shadow (the latter encompasses emotional, depth-psychological, somatic, and ecopsychological work)—to remember, experience and enact our fundamental wholeness. Furthermore, in his most recent writings Patten (2018) has brought previously less emphasised relational practices to the fore, balancing the emphasis of inner transformation with the deep engagement in spheres of social praxis. Patten acknowledges that in our time the relational practices—addressing our relationships, work, and civic engagement—are not only equally important, but "even more ultimately consequential" (p. 159) as they will help us transform our systems, policies and institutions.

If we embrace integral life practice as a vehicle for nurturing our presence, integration, and growth, Ferrer (2017) warns us not to be too *cognicentric* in our approach, thereby subordinating intuitive and embodied intelligences to the rational. Ferrer (2017) asserts that we need to allow all our dimensions to mature autonomously, according to their own developmental principles and dynamics. This, in turn, requires each of us to become researchers of our lived experience, attending to our multi-faceted nature with all our senses, deeply listening to the needs and impulses of each facet, and embracing practices that truly respond to those needs. For awareness-based social change facilitators, first-person research thus becomes a life practice, focused on investigating the dynamics of social change by making a daily commitment to attend to the living dynamics within. As Scharmer (2018) likes to emphasise, it all begins with

bending the beam of observation and attending to our interior condition—which reflects and affects the wellbeing and integrity of the larger whole.

Conclusion

In this paper, I have mapped three streams of consciousness onto the seven stages of the U process. Drawing on transpersonal psychology, I have endeavoured to illuminate the psychological dynamics at play, relating presencing to active imagination and process-oriented meditation. I have proposed that, like these transpersonal practices, presencing aims to facilitate the expression and enactment of insights emerging from the trans-egoic streams of consciousness, serving the unfolding of a more holistic intentionality that moves us beyond the narrow viewpoints of the ordinary self. I have also explored the metaphysical ramifications of presencing as channelling of Universal Will, ultimately endeavouring to manifest actions arising from the Transcendent Source. I have acknowledged the challenges for research and theory-building in this area, whilst asserting the vitality of such a quest, affirming presencing as an active spiritual discipline. The implication of such a position is that the inner work of integration and awakening and the outer work of activism must go hand in hand. I have made suggestions as to how we may achieve this and how we may frame such work effectively and safely; and I have considered how practitioners may cultivate the right capacities so that they can be competent facilitators of such work.

This time is calling for us to align collectively with the *anima mundi*, the world soul. At the start of 2020, one of the smallest of organisms on earth, a virus, made visible our deep social, ecological, and spiritual disconnects. Now, we must open up to the wider streams of consciousness and let the wisdom of universal intelligence inform our path, or else we remain stuck in rational enlightenment—knowing of our deeper interconnectedness but not honouring and enacting it—to the detriment of all.

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Peer-Reviewed Article

A Pattern Language for Social Field Shifts:

Cultivating Embodied and Perceptual Capacities of Social Groups through Aesthetics and Social Field Archetypes

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Abstract

The complex systemic issues of today, including climate change, racism, social inequality, mental health crisis, call for new ways of engaging the heart (feeling), mind (thinking), and will (doing) to actually change deep-rooted behaviors. To develop these new ways of engaging, one must learn how to cultivate first, one's *interior* condition (the inner place from which we operate) and second, one's capacities to co-create with others the *exterior* conditions for healthy social relationships. In this paper, we claim that by living in a body we are embodied and that wisdom lives in a holistic knowing that includes embodied intelligence. We argue that to address the complex challenges of our times, we must cultivate embodied and perceptual capacities and a language for our embodied experience(s). Over three years of workshops with advanced practitioners of an

embodied practice called Social Presencing Theater (SPT), we used embodied activities and design prompts (drawing, photo, video) to surface and make visible social patterns. This has led us to develop a language in the context of social systems change, in particular of *social field shifts* (i.e., transformations in the relational and felt qualities of our social systems). Through this paper we aim to contribute to social field research by proposing an embodied, visual, and verbal language for social groups to describe and reflect on social field shifts, made up of two parts: first, an *aesthetic language* to describe social field qualities; and second, three families of social field *archetypes* to describe social fields.

Keywords
awareness-based action research, Social Presencing Theater, social fields, design prompts, social arts, phenomenological research

Introduction

This paper emerged from the collaborative work between a social designer and a choreographer, engaged in contexts of social change—working with applied projects within a network of change makers, leaders, and action researchers known as the Presencing Institute. The institute was founded at the Massachusetts Institute of Technology (Cambridge, US), based on a body of research work on systems thinking (Meadows, 2008; Senge, 1990; Scharmer, 2018). It has developed innovative methods, practices, and inquiries around awareness-based action research (Scharmer & Kaeufer, 2015). By introducing performance as everyday *social-making* (Hayashi, 2017; Janevski & Lax, 2018; Kaufman & McAdams, 2018; Overlie, 2016) and design as a practice of making visible (Cross, 2006; Grocott, 2010; Hunt, 2012; Kolko, 2011; Mattelmäki, 2005; Schön, 1983) to awareness-based action research, it is our intention to demonstrate new ways of making visible intangible qualities of our social systems and social fields.

The Possibility for Healthy and Thriving Society

A core foundation of our action research practice is based on the hypothesis that society inherently has the potential for well-being and health. By health, we mean the social and environmental systems' ability to thrive. In this article, we work from an initial claim that the capacity for a thriving society lies both in individuals and the collective, as an emerging "field of possibility" (Scharmer, 2018). We can access this field of possibility as we collectively co-create our future.

Embodied Forms of Knowing

In this paper, as we consider direct subjective experience as valid research data, we must investigate the knowing inherent in perceptual experience and look closely at the fundamental characteristics of our "being-in-the-world" (Heidegger, 1962). To begin with, we must first acknowledge our embodied experience—the first-person experience of *living in a body*. Social Presencing Theater (SPT) is an awareness-based social art form developed at the Presencing Institute to support organizational and systemic change. SPT reveals that usually we do not recognize how much leverage and power for transformation lies in our very ordinary embodied presence. Our embodied knowing is mostly non-verbal. For us, embracing a new paradigm of inquiry and practice means recognizing that embodied knowing is core to our experience of the world (Varela, 1991).

Being a reflective practitioner (or a practice-based researcher) means exploring and finding ways to bring scientific methods (i.e., third-person) and direct subjective experience closer together (Varela, 1991). We can no longer leave out the value of our direct experience from what it means to be, to know, to research, and to practice—as if *truth* were ultimately an abstract understanding of reality through theories and models. As Maturana (1987) & Varela (1991) have posited, "everything perceived, theorized, believed, researched, and known is done so by an observer." However, it would be naive to rely on direct perception without a rigorous method. Likewise, it would be naive to disregard the value of what we know through conventional scientific observation, just because we *are* (i.e., personal and reflexive). "Being-in-the-world" has fundamental significance even before any sense or meaning is attributed to the worlds we inhabit (Merleau-Ponty, 1945, 2012) or enact (Varela, 1991).

As individuals, we make up social groups and systems. There is no escape from being a part of something larger than ourselves. Therefore, we frame our inquiries using the lens of the collective: first, looking at the organizing structures of the social system (Meadows, 2008) and second, at the felt and relational qualities of the system, what we refer to as a *social field*. Social field is a term defined by Otto Scharmer (2018) in the book *Essentials of Theory U* as a "quality of relationships that give rise to patterns of thinking, conversing and organizing" (p. 14)—i.e., the relational, felt dimensions of our social systems.

Artful Forms of Knowing

For this article, we draw from two case studies using a combination of two art-led forms of investigation as the primary means for participants to frame, experience, reflect, and apply insights from their embodied experience. The arts-led methods include a combination of performing arts (Social Presencing Theater) and *awareness-based design prompts*. Here, we define awareness-based design prompts as non-intrusive, tangible artifacts primarily focused on *sensing for* something in a particular environment, seeking to uncover information, and encouraging open inquiry without necessarily being goal-oriented. These design-

led tools have mostly been used as a means to ground reflection in tangible artifacts produced by (or with) workshop participants— using, for example, photographs, video, and drawing.

We recognize the value of being able to *relax* into situations, to be in touch with inherent spontaneity, and to allow activities to emerge naturally from collective awareness. In the workshops referenced in this article, we have asked participants to suspend preconceived ideas and mindsets as much as possible—to open the space for something *fresh* to come forward. By dropping judgement and cynicism, the ground itself becomes a play of curiosity and appreciation of what others offer—the ground of creativity. This attitude is exemplified in a quote by Shunryu Suzuki (2011) who said, "In the beginner's mind there are many possibilities, in the expert's there are few" (p.21). For us, SPT is a place where practitioners cultivate a "beginner's mind."

As authors, we have rarely differentiated *doing research* from *doing art*. This has led workshop participants to question what we understand the words *research* and *art* to mean. As reflexive practitioners, we consider this work to be an integration of art, action research, and social/organizational applied contexts. As a social practice, this work is a form of artistry or performance connected with politics, aesthetics, and the creation of healthy societies. For us, art could denote a research artifact—meaning a tangible element, such as our bodies or a deck of cards with drawings; or a social process. In that way, a social process of change within a social group, organization, or system would be understood as a piece of social art, as well as a research outcome.

Cultivating Embodied and Perceptual Capacities

For this paper, our core question is: *How does a more precise and granular verbal/visual language for embodied experience (using Social Presencing Theater) contribute to the activation of social systems change?* A supporting question explored in this paper is: *What are some examples of patterns of feeling, thinking, relating, and doing that might inform the movement choices we make within the context of exploring social field shifts?* As a methodology, SPT particularly addresses the question: *How might we make visible intangible aspects of our social systems?* The larger intention is to develop arts- and awareness-based action research protocols that activate and make visible the deeper creative capacities of social fields (Scharmer, 2018). Awareness-based action research builds on the work of Kurt Lewin (1966) and includes the importance of the inner condition of the researcher.

SPT has its roots in Japanese traditional dance, pedestrian movement as dance, contemporary choreography, and movement theater. Hence, it engages the body as a "wider way of knowing" (Heron & Reason, 2008)—a physical intelligence that, as *whole selves* we all have, but often do not attend to. As a social art form, SPT was designed to make visible deeper social patterns that support the cultivation of healthy social fields, sparking creative action in teams, organizations, and communities. For the case studies in this paper, groups of

people have been asked to do two embodied activities: Village and Stuck. The binding factors between the Village and the Stuck activity are: first, both activities share a common aesthetic language; second, the practices are methods of training for awareness-based interventions. However, there are differences between the two. Village is an ensemble activity that explores the function of awareness in the co-creative process. Stuck is an application of awareness to personal transformation.

Both activities are used as a laboratory for cultivating perceptual capacities; learning to attend to and notice social processes. In these activities, participants go through a process of 1) engaging in the activity, 2) reflecting on their felt experiences, and 3) applying the learning by identifying insights they may take forward into their work or life contexts.

Interior Capacities of Individuals

In this paper, we frame interior capacities as the individual's ability to become aware of and to cultivate their interior condition (i.e., the inner place from which we operate) in order to be more fully equipped to engage the complex social, environmental, and spiritual issues of today. Cultivating interior capacities can mean discovering new ways to engage the heart (feeling), mind (thinking), and will (doing) to actually change deep-rooted behaviors. We reference a conceptual framework which was originally proposed by Schein (2010) as a model of organizational culture. In this paper, we particularly refer to an adapted version of this framework, the *iceberg model* by Scharmer (2009), as our theoretical framework for clarifying what we mean by interior capacities. The model basically states two dimensions. One is above the waterline and refers to what is visible in terms of our behaviors and actions. Below the waterline are hidden aspects of what ultimately gives rise to our behaviors, including: 1) systemic structures; 2) mental models, beliefs and mindsets (patterns of thought), emotions, and felt experience (relational patterns), and 3) source, the inner place of awareness from which we operate or create.

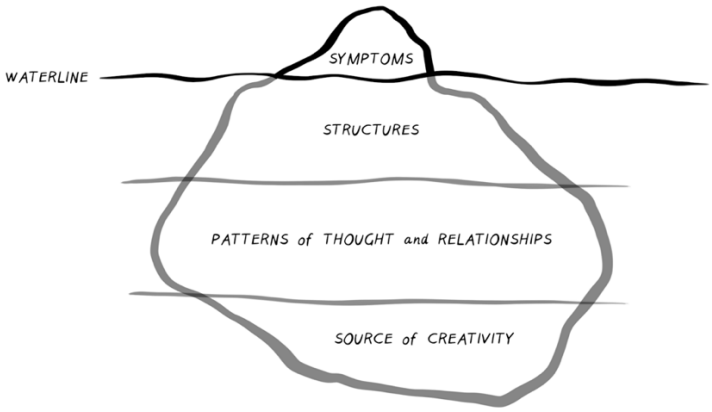

Figure 1: Iceberg Model—as adapted by Scharmer (2018) | drawing by Kelvy Bird (2020)

Exterior Capacities

By exterior capacities, we mean the capacities of individuals to perceive what is outside of themselves: first, the visible social structure that we (Presencing Institute practitioner-researchers) call the *social body*; second, the interiority (i.e., felt quality) of a social system called the *social field*. Field Theory was originally defined by psychologist Kurt Lewin (1966) as he examined patterns of interaction and relationships between individuals and the environment (what he called *Field*). At the Presencing Institute, our colleague Otto Scharmer (2009) introduced us to Lewin's Field Theory when we began to articulate the term social field. By that we mean the relational qualities in a social system, i.e., the patterns of relationship and interactions among people.

Embodied activities such as the ones introduced later in this paper offer a visible microcosm of a social system. We can actually see people doing something together, which is visible (the social body). Yet the activities create a quality of relationship that is not visible, but clearly experienced and sensed. When we try to consider a larger system, for instance education, we cannot actually *see* the system (it is not visible in the way that a social group doing an embodied practice would be). However, even for a larger social system we can still register and tap into the felt qualities of its social field.

Methodology and Case Studies

Methodology

Our methodology uses a combination of arts-led research and awareness-based action research. Workshop participants are taken through an arc of embodied activities (as described below) using Social Presencing Theater, in particular: *Village*, and *Stuck*. Research methods include case studies, group observation, journaling, group reflection, design prompts, and iterative prototyping. The case studies draw from observations in applied situations, and learning is re-integrated into the process through iterative prototyping. The prototypes design and introduce awareness-based prompts into group processes. These design-led tools prompt new pathways for awareness and reflection while allowing for open conversations that inform their very design iteration. Ultimately, it is our intention that our methodology explores an integration of first-person (personal/reflexive), second-person (interpersonal/relational), and third-person data (conventional scientific observation).

The reflection part is usually done in small groups of three to five people, using first-person voice (*I*-sentences) to speak of their experience. People describe their experience using the words, "I saw…," "I felt…," "I did ….". *I saw* and *I did* describe the visible structure, including body postures and spatial choices made by the social group. For example, "I saw the group was at different levels (some on the ground and others standing)" or "I saw we moved in the same direction at a rhythmic pace." *I felt* describes sensations, feelings, and a relational structure,

for example, “when you moved closer, I felt curious”, or “when you released my hands, I felt surprised.”

Case Studies

For this paper, we use two SPT embodied activities as case studies, observing participants from capacity-building programs delivered by the Presencing Institute (from 2017 to 2020). Workshops were designed for groups of 20-30 participants, including organizational leaders in business and non-profit sectors, educators, artists, architects, freelancers, and consultants in the fields of organizational change, personal development, learning, and ecology.

The first case study draws from a series of prototypes on developing a visual and verbal language for reflection on one’s embodied experience within social groups (teams, organizations). This was developed in parallel with two advanced training programs on Social Presencing Theater (2017-19) in New York and Berlin. The second case study is the refinement of a pattern language for social fields, drawing from individual, or systemic obstacles (what we call *Stuck* situations) embodied by researchers and SPT advanced practitioners during two research gatherings (2019-2020) on Social Presencing Theater, in Nørre Snede (Denmark). By pattern language we mean a visual, embodied, and verbal language on patterns of “thinking, conversing and organizing” (Scharmer, 2018) within the context of social systems research. The observations and learnings from each case are introduced below. Ultimately, we surface a pattern language for social fields made up of two parts: first, an aesthetic language (i.e., language that describes the felt sense of direct experience) to reflect upon and speak about individual and collective movement and spatial choices; and second, the description of three “families” of social field archetypes. We define archetype as a recurrent pattern or feature.

We are interested in developing a fresh language to describe experience which is “aesthetic, immediate and relational” (Pilgrim, 1986). This opens a way for participants to shift from conventional subject-objective descriptions to wider perspectives. For example, in some SPT activities we invite the voice of the future to inform us. While in another practice, the group listens into what the whole social field is communicating. In these ways, language turns the subject-object orientation around towards allowing description of experience to come from the whole (*what is the whole saying to us?*). That is, a shift in point of view from *me* (what I think) to *you/it* (the voice of the collective). Case study 1 explores whether an aesthetic language can support the opening of the felt sense of the collective.

Case 1 | Village: An Aesthetic Language for Describing Social Field Qualities

The Village practice was developed by choreographer Arawana Hayashi to explore the ways in which groups create coherent social structures. Participants (groups of ten to twenty people) usually begin by standing or moving around in a

room. They are introduced to a social *vocabulary* including seven things they can do in the Village: stand, sit, lie down, walk, run, turn, or greet with a bow or nod. While engaged in these activities they are asked to maintain a mindful attention to their bodies and an awareness of the entire social space (both the visible structure, referred to as the social body, and the invisible relational quality, termed the social field). They explore three dimensions: level (e.g., lying down, sitting, or standing), proximity (distance to others), and direction (which way one is facing). This specific physical and spatial vocabulary affords choice-making which becomes the raw material for group exploration, reflection, and learning. For twenty minutes, people use this vocabulary to explore what they can co-create. At the end, small groups of three to five people reflect on what they noticed, felt, or saw. From direct experience of the practice and through observing practice groups, we were able to identify 36 social patterns which were then collected into a reflection and research tool, the Aesthetic Language Cards. These begin to describe specific qualities of social fields.

Case 2 | Stuck: Three Families of Social Field Archetypes

The Stuck activity was developed by choreographer Arawana Hayashi and colleagues at the Presencing Institute. People are asked to individually embody (i.e., come into a body shape, which we refer to as *Sculpture 1*) a situation in their organizational life in which they feel stuck. Stuck is not framed as a problem to be solved, but rather as an opportunity to learn. People are asked to attend to their Stuck shape with careful observation. Then the person allows the body to begin a movement, which moves them out of their embodied stuck shape. The subject is relying on their embodied experience, not on their thoughts about their experience. They follow that movement until it comes to an end (*Sculpture 2*). They reflect on the transition from their first sculpture to the second. The research team usually participates in three ways: first, by engaging in (doing) the activity with workshop participants; second, by holding small-group (three to five people) or whole-group conversations reflecting back on experience, as described in the methodology section above; and third, by going through the artifacts (e.g., images, photos, videos) participants might have produced. For example, in the case of the Stuck practice, participants have at times taken photos of each other's embodied sculptures. In these ways, the research team has collected and studied the data that would reveal similarities and differences in stuck shapes and in the patterns of movement that shift people from their first sculpture to the second. Our findings reveal three broad archetype families of stuck patterns, which have contributed to describing a pattern language for social field transformation.

Findings: A Pattern Language for Social Field Shifts

An Aesthetic Language for Describing Social Field Qualities

Figure 2: Village practice at the Presencing Institute

By paying attention to the groups practicing the Village, we noticed how people co-created a social reality together, either by moving *the same as* someone else/others, or *different from* someone else/others. Some people would start something new and, in doing so, lead the way. Others would follow (*same as*), at times mirroring or repeating a certain movement, or contrast (*different than*) what was offered. As these patterns repeated, we recognized them as movement and spatial choices, a demonstration of people exercising choice-making. The Village was an example of collective making, knowing-in-action (Heron & Reason, 2008), and shaping of a micro version of the social world.

We noticed the practice offered participants a challenge: They experienced something felt, intangible, and non-verbal, while being asked to communicate verbally what that experience was. We noticed the descriptions of their experience were often habitual, interpretive (i.e., conceptual), vague (hard to follow), generalized (not specific), or psychological (sharing of personal, emotional states). These expressions often failed to reveal the multi-layered, underlying patterns and intangible qualities that were present in the social field. We wanted to draw attention to the relationship between the visible social-spatial patterns that the group enacted and the feeling quality produced by those actions. For example, when the group members made specific movement choices that were visible, they created a social field that expressed a sense of *harmony*. If one person introduced a rhythmic pattern by stamping, tapping, or swinging and

others joined, *rhythm* became a binding pattern. These felt, intangible elements related directly to the visible social configurations and spatial patterns. We could see coherence, contrast, and rhythm happening as elements of social field creation. We began to consider these structural principles of social configuration as the beginning of a pattern language.

We drew upon the patterns we observed and introduced words to express with precision the richness of non-verbal experience. This addressed a need for more specificity (refining language), sharpening observational skills, broadening the language from habitual ways of describing experience, and including the perspective of the whole. In iterative cycles of prototyping, we drew from the performing arts and design theory (Lidwell, 2003) to create a language based on these patterns—language for what is felt. Hence, we named it an *aesthetic language*, aesthetic being the opposite of anaesthetic (i.e., numb), that which is felt. By introducing a first iteration of a card deck as a designed prompt for group reflection, we proposed a language that was inspired by early observations of the group practices, and also introduced principles from design theory and theater. These included: contrast, edge relationships, scale, balance, consistency, rhythm, rituals, similarity, proximity, repetition, ambiguity, motif, and symmetry. As a design prompt, the intention of using the card deck was to spark and provoke new ways of ascribing language to experience, while also testing *what sticks*—i.e., what verbal language would make sense to practitioners to speak of their felt experience.

Figure 3: Printed cards as prototype 1.0 (New York, 2017)

Over time, we noticed that groups also co-created social interactions based on relational qualities (i.e., the manner in which relationships were established). By asking people why they made certain choices in the Village, they would speak of a need to belong, an interest in playfulness, a sense of curiosity, a feeling of inclusion or exclusion, connection or disconnection. We concluded that these

principles did not belong to the category of the visible (spatial) structure, as they referred more to the group's relational experiences, i.e., how they felt in relating to one another, and the space.

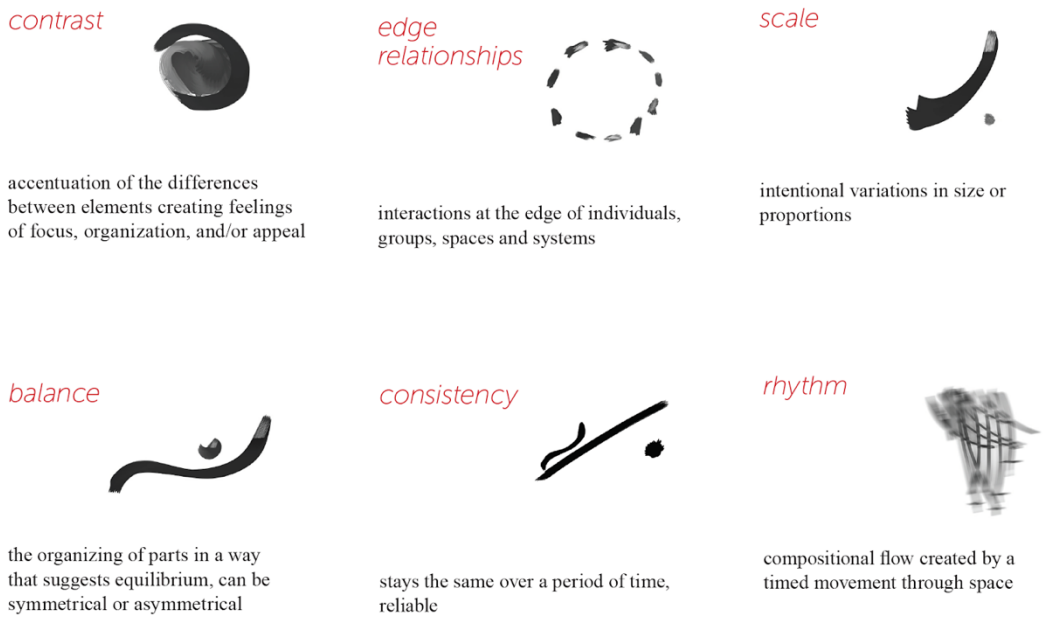

Figure 4: Version 1.0 of the Aesthetic Language Cards (New York, 2017)

Another observation of the group practices revealed patterns in terms of awareness—how people were attending to themselves (i.e., the interior condition, of individuals); how they attended to others/the space (i.e., exterior conditions, as a social body); and how they attended to the emerging shifts in the social field. For instance, people would speak of how they felt tightening, tensing, or closing down to the exterior environment. Upon noticing that, they were reminded to relax, feel grounded, and look outside of themselves. We clustered these observations into a principle called *relaxation*. Others spoke of a *soft gaze* (a peripheral vision) and how at times their attention was on the whole space, including all participants or stakeholders. We named that principle *attending to the whole*.

Based on these observations, we categorized the new patterns into two new categories: relational structure (relational qualities) and deep structure (how people notice, attend, or are aware of their experience, and of others/space). In addition to the visible structure from the first round of prototypes, we created a second iteration of the deck of cards as an awareness-based prompt: a research tool to prompt reflection through the act of "becoming aware" (Depraz, Varela & Vermersch, 2003). We currently understand this to be an output of a participatory research process, that included thoughtful observation, iterative cycles of prototyping, and group feedback. While the cards are a research output,

they are also a tool for further reflection, as they continue to be used by a community of practice.

Figure 5: the version 2.0 of the Aesthetic Language Cards introducing the visible, relational, and deep structures (Berlin, 2019)

Three Families of Social Field Archetypes

Figure 6: Movement transition during the Stuck activity (New York, 2017)

When we observed groups using their bodies to give physical form to some aspects of a social context, organization, or system, it became clear that there are similarities and patterns where it concerns the tangible, visible elements of the social structure (i.e., the embodied physical shape). In the Stuck activity, for instance, we could see physical shapes being pushed down or arms stretched in different directions. We saw when a shape was crunching in or flat on the ground. The visible dimension of these embodied shapes is what we call the *visible structure*. However, stakeholders and workshop participants also spoke of felt qualities. That is, when a person's embodied shape evokes a certain feeling or sensation, both in those embodying it and in those who see it. The felt experience became the basis for an expanded feeling of connection with others or with the environment, being part of something larger than oneself, and feeling a sense of the whole. Ultimately, we observed that through the Stuck activity these embodied shapes simultaneously have both visible and felt characteristics.

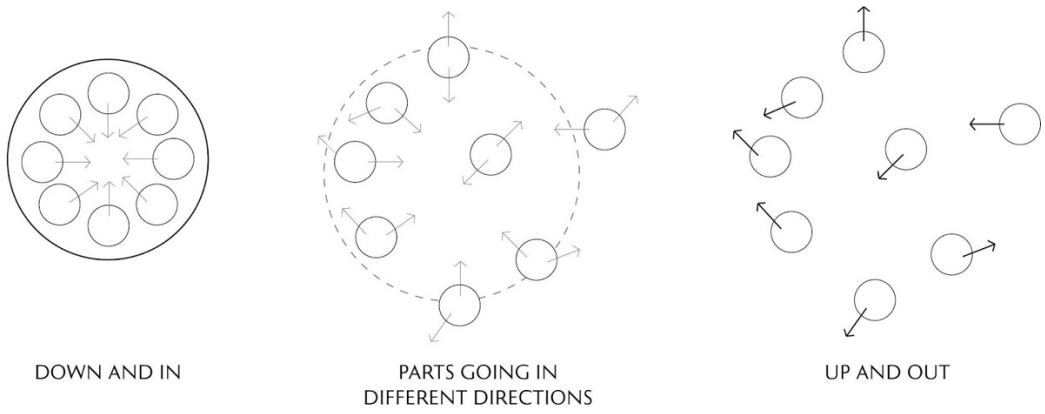

Figure 7: A scale of three archetype families identified in this case study.

In order to develop patterns for language to describe the felt experience within the context of social systems, we began observing individuals and prototyping a visual model to gather data. The photographs below convey the essence of the patterns and hint at how these patterns show up in groups. The photographs offer the reader a felt sense of the patterns. The individual is an integrated body-mind system and, given that, we are working from the premise that there are parallels between individual hindrances to creativity and collective patterns of stuckness. Therefore, observing individual practitioners gave us insight into social patterns.

We noticed that Stuck body shapes usually fell onto a continuum from what we called *inward focused*, when there was a very strong sense of boundary, to *dispersed*, when an individual's experience felt scattered, without clear edges. This scale shows an aspect of polarities. Individuals shared their stuck body shapes in groups. Based on group observation and reflection, we introduce (below) a list of the social field archetype families we have identified so far. Each contains a list of keywords people have attributed to them. We call them families

because we realize that there is a great degree of both variability and relatedness.

Family 1, Down and In, includes physical shapes in which the body is bent down and focused inward. Usually, these shapes appeared in the sitting position, commonly curved inwards, at times with a loss of vision. Four archetypes were identified as a part of this family:

- Turned in on Itself
- Pushed Down
- No Vision
- Collapse

Family 2, Parts Going in Different Directions, introduces physical shapes in which the parts of the body were going or focused in different (usually two) directions. Two archetypes have appeared here:

- Looking Forward and Held Back
- Twisted

Family 3, Up and Out, includes physical shapes that were going in multiple directions. They were usually standing, with arms and legs stretched out, away from the center of the body. We include one archetype here:

- Going in Multiple Directions

Family 1: Down and In

Turned in on Itself: appeared at all three levels (lying down, sitting, and standing). The shoulders are hunched around the heart area, and the legs are turned in. The head is down, and the eyes are looking down. The body appears to be turning in on itself with no connection to the outside. The arms are close to the body and often legs are also close together. Words/phrases people offered: "sinking in", "looking in", "can't see", "heart inward", "bent forward", "crunched", "inward focus", "pressed."

Figure 8: Embodiment of social archetype Turned in on Itself (New York, 2016)

Pushed Down: appeared at all three levels (lying down, sitting, and standing). The body is bent over, and the spine is in a curve (C). There is a sense of weight, as if something is pushing the body down, holding it down so that it cannot straighten up. The gaze is down or the eyes are closed. The arms could be making a gesture and the legs could be wide apart or closed together. Words/phrases people offered: "weighted down", "held down", "center but no periphery", "pulled inwards to the point there is no legs and no head", "the heart part is sunk in", "could not see or speak", "seemed to have lost their vision and voice", "not being able to get going and rise up", "crunched vertical dimension", "resilience", "powerful seed that can surface", "giving birth", "felt earth."

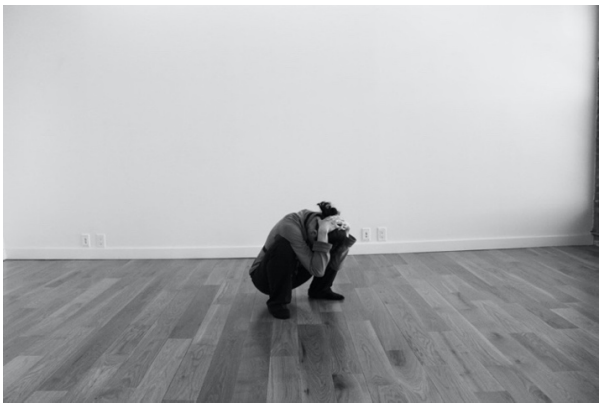

Figure 9: The embodiment of social archetype Pushed Down (New York, 2016)

No Vision: appeared in standing or sitting positions. The gesture shows hands in front of the eyes and usually, but not always, the spine is curved forward. Words/phrases people offered: "I don't know where I am going", "vertical dimension separated from the body", "head takes a bigger part", "body feels thin", "turned away", "disconnected from the ground", "connecting through the heart", "prevalent sky", "the top of the head is disconnected from the rest of the body", "the heart connects."

Figure 10: Embodiment of social archetype No Vision (Denmark, 2020)

Collapse: appeared at all three levels (lying down, sitting, and standing). The body lacks energy and is in a crumpled, bent-over shape. Sometimes it is on the floor and not holding its own weight. Words/phrases people offered: “no energy”, “feeling totally disempowered”, “helpless”, “burnout.”

Figure 11: Embodiment of social archetype Collapse (Denmark, 2020)

Family 2: Parts Going in Different Directions

Looking Forward and Held Back: this usually appeared as a standing position. The gaze, hands, and the upper body would reach forward, while the pelvis and legs would be rooted in place, as though someone were holding them back at about the waist or hip level (some people have asked group partners to hold their “waist back”, with the intention of intensifying a felt sensation). Usually, the upper and lower core parts of the body seem disconnected. Words/phrases people offered: “moving forward and held back”, “disconnected parts”, “significant parts are missing”, “eyes forward”, “with vision but not moving”, “a part is moving forward and the other isn’t.”

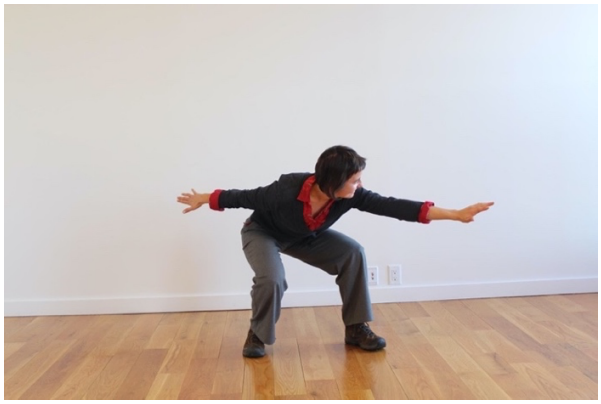

Figure 12: Embodiment of social archetype Looking Forward and Held Back (New York, 2017)

Twisted: this social archetype was mostly seen at a standing level. The head and gaze would be facing one direction, while the lower body, feet, and legs would be pointed in another direction. Often the arms would be extended from the heart area, in a direction between the eyes and the feet. Words/phrases people offered: "one part of the body is looking in one direction and another part of the body is heading another way", "up and twisted", "spinning", "caramel twist."

Figure 13: Embodiment of social archetype Twisted (Denmark, 2020)

Family 3: Up and Out

Going in Multiple Directions: this social archetype usually appears at a standing level. The arms are extended, as either reaching or being pulled in opposite directions. While one arm is reaching forward (or to the right/left), the other reaches backwards (or to the right/left). Sometimes one arm is touching the body while the other is stretching forward. The legs often cover a wide range. The gaze is somewhere between the arms' direction. There is tension. Words/phrases people offered: "a lot of periphery, not much center", "going in different directions", "it values spaciousness, independence, and autonomy", "may or may not be aware of others", "pulled in two directions", "feeling of loyalty to different people."

Figure 14: the embodiment of social archetype Going in Multiple Directions (New York, 2017)

The social field archetypes are not meant to oversimplify people's experience or reach some conceptual understanding. Instead, they are a framework for prompting a generative investigation into patterns through which individuals, teams, and larger systems shut down and lose access to their full potential (e.g., intelligence, compassion, brave action).

Summary

In this article, we explored how a combination of arts-led methods, including Social Presencing Theater and awareness-based design prompts, could support making visible the intangible qualities of social systems—particularly the relational dimension of social fields. By bringing Social Presencing Theater (Hayashi, 2017) and design prompts to awareness-based action research, we created a process of doing (embodied activities), reflecting on subjective experience, and identifying key actionable learnings and insights from practice.

The case studies were developed as a series of prototypes in iterative cycles over a period of two to four years. Through a practice-led research emphasis, we engaged with various stakeholders through invitation—as the embodied activities and reflection tools were gently introduced as offerings for self and group inquiry. Participants were invited to try out the methods as a way of reflectively exploring how they co-created social or organizational contexts. At the end of every workshop, the method was discussed in terms of what it revealed and what changes could be made as new iteration(s). The reflections expressed in this article are primarily from the authors' participation in the activities, from their observations of others, and from reflective dialogues with workshop participants. We, the authors, engaged both as artists and practice-based researchers.

By integrating theater (making something visible with our bodies) and design (i.e., materiality, a means of giving physical form to emergent insights and learning experiences), we arrived at an *aesthetic language* to describe social

field qualities, as well as three families of social field *archetypes* to describe social fields (as outlined in the previous sections). The prototypes allowed us to explore possibilities for refining the language used to express embodied experience. We learned that the language helped to heighten awareness of the elements in our personal and intangible experience. Ultimately, we discovered that it allowed workshop participants to remain in a space of awareness-based spontaneity and open-ended engagement without immediately needing to interpret or make conceptual meaning of experience. By suspending the immediate need to concretize an idea or feeling, we noticed participants had more time to delve into their experience, and cultivate a sense of attention, and noticing. In the conclusion section below, we further detail our findings.

Conclusion and Implications

The objective of our research was to discover how a more precise and granular verbal and visual language for embodied experience might contribute to an activation of social systems change. To support the creation of such a language, we observed patterns of feeling, thinking, relating, and doing that inform our movement and spatial choices in the context of exploring social field shifts. By focusing on Village and Stuck as core embodied activities, a series of social patterns were revealed and clustered into the early findings of what we call a pattern language for social field shifts. This pattern language is made up of two core parts: first, an aesthetic language to describe the qualities of social fields; and second, three families of social field archetypes. Through this paper, we conclude that a more precise and granular verbal/visual pattern language for embodied experience contributes to a deeper activation of social systems change in the following five ways.

Introducing a fresh language for experience: The pattern language introduces participants to a language for embodied experience which is based on aesthetics (the felt dimension of experience) and visual imagery, as opposed to only being interpretive, relying on people's memory of what was done during the activity, or on a particular emotion. In that way, the pattern language emphasizes new forms/media of perceiving through embodiment, visual imagery, photograph, video, and drawing.

Allowing participants to stay longer with experience: The pattern language allows participants to stay longer in a process of suspension without going straight into conceptual meaning-making. The language opens a contemplative space allowing deeper reflection that accesses richer data.

Building embodied and perceptual capacities: The pattern language builds individual and collective capacity for attending to, noticing, expressing, and describing specificity of experience (e.g., focusing on specific moments of the experience by asking people to recall or evoke specific situations) and nuances (e.g., underlying patterns).

Making transformation visible: the pattern language allows people to directly see transformation happening by embodying systemic situations and by looking at photo images across time to recall essential shifts.

Redirecting awareness: the pattern language shifts attention from self-orientation to awareness of the whole. The aesthetic language helps move people from ego (talking about one's individual and emotional experience) to eco (having a sense of the whole). By helping people access the felt dimension of their experience, participants become aware of themselves as parts and co-creators of the system, rather than isolated from it.

The significance of this research is that the use of a pattern language appears to result in an increase in self-awareness, awareness of the collective, and awareness of the creative potential of the group. Social Presencing Theater activities combined with design-led methodologies reveal personal and social patterns (the movement/spatial choices), and uncover creative potential both in the individuals and in the groups. We noticed participants were more self-aware of the choices they made and the motivation for those choices.

By introducing a pattern language, this research provides a tangible knowing-for-action that might support change makers, leaders, educators, and organizations in shaping the social world of our aspirations. We recognize the urgent and pressing social and systemic challenges that individuals and organizations are facing, such as those addressed by the United Nations' Sustainable Development Goals. In our practice, we have seen that the boundaries between organizations and large social systems, and each individual's everyday life are very porous. In an expanded sense, through the performance and arts-based lens, we could say that everyday living is itself art-making. To live in society with others is to build society, or what Beuys (2004) called a "social sculpture."

By making visible more subtle and intangible aspects of our shared collective experience, we can attend to social systems transformation. This paper shows that developing design-led, arts-based, and practice-led research methods provides a fertile interdisciplinary soil to investigate the intersections between individuals and systems—between the personal and the collective. It is our hope that this intersection can be the very soil in which we can build more sustainable systems, structures, and organizations that make up social worlds we wish to be a part of.

The limitations of this study are primarily around analysis of data, particularly stuck patterns in social systems. First, we have a collection of photos and videos of individual stuck embodied shapes, but need a larger data set. Second, we are looking for ways to analyze these images. Twenty people in similar body shapes can describe their experience in diverse ways. One question for us is how to see overall patterns, while including the diversity of verbal descriptions given by participants. Another area of inquiry for further research is into how insights gained through the embodied activities and use of pattern language might be transferable to people's everyday work, family, and societal

situations. Does the language help people *embed* the felt experience in ways that could be transferable to their context? Moving forward, we also ask how we might further investigate patterns of shifts in social fields. This was explored in the Village activity, but for this paper the Stuck activity focused on describing the current state of the challenge only (embodied by an individual Stuck), not the transformation into possibility. Hence, are there patterns in shifts from Sculpture one (current) to Sculpture two (emerging future)? What are those? Finally, in this paper we limited the application of the Stuck activity to an individual practice. In the future, we intend to observe stuck patterns in social groups and how groups collectively move toward innovative change. Are the patterns observed in group Stucks similar to or different from those revealed in individual Stuck practice?

The body's language is movement and stillness—a language of embodiment. When this is seen by others, social sculptures are witnessed, then the resonance between the image and the witness becomes a visual language, in the same way that looking at visual art (or any object) becomes an aesthetic, felt experience. The significance of our findings is that verbal aesthetic language can heighten the perception of felt experience and provide a verbal language for describing non-verbal experience (resonance) with more accuracy and subtlety. We opened this paper by introducing the possibility of creating a healthy and thriving society based on accessing our full creative potential. Direct knowing of, and a language for communicating, experience are necessary capacities for individuals and groups as they address today's challenges in a holistic way—engaging not only cognitive intelligence, but also the embodied, felt, or aesthetic knowing.

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Peer-Reviewed Article

Global Social Witnessing:

An Educational Tool for Awareness-Based Systems Change in the Era of Global Humanitarian and Planetary Crisis

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Abstract

'Global social witnessing' was originally proposed by Hübl and Ury (2017) and was developed as a practice of "contemplative social cognition" (Singer et al., 2015). Though 'global social witnessing' is applied in various contexts by group facilitators of contemplative practice (Cmind, 2014), the concept has not yet been subjected to thorough research and has not yet arrived at a common scientific understanding and definition, which needs to be addressed throughout the research methodology of applying this concept. This paper aims to propose 'global social witnessing' as an educational tool for awareness-based systems change by highlighting its philosophical and psychological foundations in search of its ethical implications for bearing witness, a term often used in psychotherapy (Orange, 2017). This body of work draws on Emmanuel Levinas's philosophy of relational responsibility, and focuses on transformative, systemic learning. As a consequence, this exploration will hopefully generate further research questions that can serve as focal points for interdisciplinary projects of awareness-based systems change (e.g., philosophy, sociology, psychology, education, neuroscience, and physics).

Keywords
global social witnessing, bearing witness, relational responsibility, whole-system-awareness, interdependence, interpenetration, social field

Introduction

At the 75th anniversary of the liberation of German Nazi concentration and extermination camp Auschwitz on January 27th in 2020, the Holocaust survivor Batsheva Dagan raised an intriguing question in her speech: "Where was everybody? Where was the world, who could see that, hear that, and yet did nothing to save all those thousands?" (Morris, 2020). This question of hers very much acted as a powerful warning signal for humankind in the 21st century, where we are constantly confronted with terrible crises, such as climate change, the refugee crisis, a political trend towards to the right, nuclear weapons, poverty across the globe, the covid-19 pandemic etc. At this time of global crisis, questions such as Ms. Dagan's should be asked again and again: "Where are you? Where is the world that knows, but does nothing?" Are we witnessing the world?

Seeing people's suffering on the news—children in famine in countries across Africa or a grief-stricken mother holding her lifeless child in Syria—many people feel empathy and com-passion. These kinds of tragedy are a frequent occurrence in our world today, but the impression they leave is not permanent, because the overwhelming stream of such news has desensitized many people to the world's pain and suffering. These kinds of everyday passive attitudes are deeply rooted in an individualistic dualism: I (subject) and the world (object) are separated. Through global issues, such as climate change and the refugee crisis, however, many people have begun to realize that we are in fact connected to each other. Thus, we can testify to the suffering of other people with a belief that we are not separate from them. Instead, 'we' and 'they' are parts of a greater system. This kind of cognitive and emotional observation can be referred to as empathy, which has been studied intensively in past years in psychology and neuroscience (cf. Bateson, 1991, 2009). However, there still is a critical question remaining: Is empathy enough? We and the world are interrelated, but in the "lived world" (Nishida, 1911) we are still fragmented and do not experience our interconnection as such. I might see myself as a separate closed system and cannot recognize a larger transcendental system in which 'I' (subject) and the world (object) are interconnected, as "history is repeating and there's nothing we can do about it" (Trilling, 2018). When one from Western society sees a crying child in Syria on the news, one might feel empathy and compassion with this child. At the same time, one can feel helpless, powerless, and a sense of despair, and have a peripheral feeling of interconnectedness with the world. How can one actually become present mentally, emotionally, and physically with all human and living beings who experience intense and profound moments of struggle, doubt, and suffering? The question above "Are we witnessing the world?" is therefore not easy to answer.

The aim of this paper is to propose 'global social witnessing' as an educational tool for awareness-based systems change by highlighting its philosophical and psychological foundations. In the next chapter, 'global social witnessing' will be presented and redefined as a contemplative, educational tool. In chapter 3, the author will present three philosophical and psychological foundations of 'global social witnessing' as an educational tool for awareness-based systems change: (1) bearing witness, (2) relational responsibility, and (3) whole-system aware-ness. Chapter 4 will point out that 'global social witnessing' should be explored further from multiple academic perspectives in order for it to be acknowledged in an educational context.

Global Social Witnessing

'Global social witnessing' was originally proposed by Hübl & Ury (2017) and developed as a practice of "contemplative social cognition" (Singer et al., 2015). Herrmann, Matoba, and Wagner (2018) define this method as:

> Global (G) refers to large-scale events and processes affecting large numbers of people or the planet as a whole. Social (S) refers to the fact of interrelatedness of humanity. Witnessing (W) points to the capacity of fully attending to and testifying to critical events. GSW, then, is at its core the emergent human capacity to mindfully attend to global events with an embodied awareness, thereby creating an inner world space mirroring these events. (p. 1)

As a practice of "contemplative social cognition", GSW involves a sequence of "micro-actions" (Petitmengin et al., 2017): An active choice to pay attention to world events, to allow oneself to be affected by them, to become aware of phenomenal impressions on various levels (mental, emotional, somatic, relational...), and to attentively stay with these impressions and their unfolding within one's awareness. GSW can be practiced individually or by a group. In a group context, the practice consists of three stages: First, when initiated through a shared intention of the group, a practice is done in which each individual member of the group mirrors different aspects of a particular global event through information sharing. Secondly, each individual member senses into this event, and finally the collective entity's social field then mirrors the complex systemic dynamics of this global event and its potential unfolding (Hübl & Ury, 2017).

In a GSW process, participants are invited to connect with a global event by first learning about the context and the facts of the event and then engaging with it through images, such as studying a picture of the event. The intention behind doing this is to allow oneself to be affected by the event, to become aware of phenomenal impressions on various levels (mental, emotional, somatic, relational, etc.), and to attentively stay with these impressions and their unfolding within one's awareness. This process can be facilitated with the

following prompts: (1) Witness what happens in your mind; (2) Witness what happens in your emotion; (3) Witness what happens in your body; (4) Imagine you are in a dialogue with a person affected. What would this person ask you? And how would you answer their questions? (5) Witness what happens in your mind, emotion, and body in response to this imagined dialogue.

The internal process of GSW takes place in three stage. At the first stage, the *observing stage*, the participant experiences the world by seeing and listening to an event/person as an object and constructs its meaning individually. This *observing stage* cannot bring about perspective transformation, as it still remains isolated in an "I-perspective" through which one thinks, "Without you I would have no problem" (Matoba, 2015, p. 17). At the second stage, the *sensing stage*, the participant experiences the world by looking at the *face* of the *Other* and sensing the person behind this face. This experience is "the process of creating an understanding of or perception of a situation, which often appears to be a direct participation in an event" (Jarvis, 2005, p. 72). Direct participation enables the participant to empathize with the *Other* in a situation and construct its meaning in which the *I* and the *Other* feel strongly interrelated. This stage of sensing provides the participants with the ability to identify with the perspectives of the *Other* and to increase their opportunity for taking on an "I-Thou-perspective" through which one realizes, "Without you I could not solve the problem" (Matoba, 2015, p. 17). In the third stage, the *witnessing stage*, the *Other* can be experienced by embodying interconnectedness between "me" and "you" through mental, affective, and bodily responses. The consciousness of separation between *I* and the *Other* can be suspended by deepening empathy, which can transform into felt-oneness. In this process of witnessing, the separation between the witnessing I and the witnessed *Other* is transcended so that the participant can realize their potential for becoming more liberated, socially responsible, and aware of extending the self-system in thinking, feeling, and sensing from "we-perspective" though which one becomes aware that "Without you we could not learn together" (Ibid.). Those who find themselves in this stage go back to the real world and respond to the world by bringing "global empathy" (Bachen, Hernández-Ramos & Raphael, 2012, p. 438) into action.

Theoretical Foundations For Global Social Witnessing As Awareness-Based Systems Change Method

In the description of the GSW process in the previous chapter, some important components were suggested, such as witnessing, social responsibility, and extending the self-system. These components play a crucial role in improving GSW as an educational tool (social technology) of awareness-based systems change. In this chapter, each of these components will be discussed more precisely as 'bearing witness', 'relational responsibility', and 'whole-system awareness' in order to position them as theoretical foundations of GSW as an awareness-based systems change method.

Bearing Witness

The most important component of GSW is bearing witness, which is a psychological term that refers to sharing our experiences with others, particularly engaging with others who have had traumatic experiences. Pikiewicz (2013) points out that "bearing witness is a valuable way to process an experience, to obtain empathy and support, to lighten our emotional load via sharing it with the witness, and to obtain catharsis".

In general, empathy is understood as the capacity to understand or feel what another person is experiencing from within the other's frame of reference, by seeing through the eyes of another, listening with the ears of another, and feeling through the consciousness of another. Bateson (2009) distinguishes eight different psychological views of empathy: (1) Knowing another person's internal state, including their thoughts and feelings; (2) Adopting the posture or matching the neural responses of an observed other; (3) Coming to feel as another person feels; (4) Intuiting or projecting oneself into another's situation; (5) Imagining how another is thinking and feeling; (6) Imagining how one would think and feel in the other's place; (7) Feeling distress at witnessing another person's suffering; (8) Feeling for another person who is suffering. The first six concepts concern our competence to know another's thoughts and feelings, but the last two concepts are not based upon "sources of knowledge about another's state, they are reactions to this knowledge" (Bateson, 2009, p. 9). He posits that (7) and (8) can generate motivation to help other people who are suffering, with the understanding that the motivation that comes with (7) does not appear to be directed toward the ultimate goal of relieving the other person's distress, but rather one's own ("egoistic motivation") (Bateson, 1991). On the contrary, feeling for another person who is suffering (8) is likely to motivate one to respond to the suffering of another with sensitivity and care ("altruistic motivation").

In the last decade, "social neuroscience has already begun to recognize at least some of the distinctions [of these eight psychological views of empathy], and has started to identify their neural substrates" (Bateson, 2009, p. 12). In this way, certain aspects of bearing witness can be described and defined in psychology and neuroscience through the framework known as the "empathy-altruism hypothesis", which says that "prosocial motivation associated with feeling empathy for a person in need is directed toward the ultimate goal of benefiting that person, not toward some subtle form of self-benefit" (Bateson et al. 1988, p. 52).

Another aspect of bearing witness is rooted more in spiritual and religious traditions and practices. Taoism points clearly to the connection between the metaphysical unity of the world and an ethical imperative to care for everything. The "oneness hypothesis" of Ivanhoe (2015, p. 237) states that "we are fundamentally one with all things and should care for them as more distant extensions of ourselves because of our primordial connection with every aspect of the world". Holton and Langton (1999, p. 209-32) argue that a sense of oneness, rather than empathic concern, is what motivates people to help others. Their

research relies upon the idea that "most often people feel and act in a benevolent manner not because they experience more empathic concern for another, but because they feel more at one with the other—that is because they perceive more of themselves in the other" (Ivanhoe, 2017, p. 91).

Relational Responsibility

In the previous chapter, bearing witness was explained from two perspectives: the "empathy-altruism hypothesis" and the "oneness hypothesis". Ivanhoe (2017), one of the advocates of the latter, points out that our concern for others transcends selflessness and altruism. This would mean that it becomes inevitable that we expand the western concept of the self as reified (a self-conscious individual) toward Emmanuel Levinas's (1969, 1996) notion of the self, existing only through its relationship to the *Other* (a contextual (in)dividual). Although Levinas' philosophy remains positioned in the western tradition of the dichotomy between me (self) and you (the *Other*), the emphasis is placed on the *Other*. Levinas (1969) derives the primacy of his ethics from the experience of the encounter with the *Other*. For Levinas, "the Other precisely reveals himself in his alterity, not in a shock negating the I, but as the primordial phenomenon of gentleness" (1969, p. 150). The irreducible engagement of the face-to-face encounter is a privileged phenomenon in which both the other person's proximity and distance are felt strongly. The fundamental intuition of Levinas's philosophy is the non-reciprocal nature of responsibility. The phenomenological descriptions of intersubjective responsibility are unique to Levinas. Levinas's *I* lives outside its embodied existence according to modalities, consumes the products of the world, enjoys, suffers from the natural elements, constructs dwellings, and carries on the social and economic transactions of its daily life. However, no event can shake an *I* consciousness more effectively than an encounter with another person. The *I* first experiences itself and can account for itself in this encounter; the *I* responds from the intrinsic relationality. With this response, the beginning of response is the beginning of dialogue.

Levinas (1969) provides a crucial path for understanding human relatedness, a relatively new concept indispensable to psychological and metaphysical discussions about empathy and bearing witness. Moreover, his philosophy offers a theoretical backdrop against which to understand important concepts of relational life, ethical responsiveness, and the complexities of human uniqueness. Below, Levinas's theory of "relational responsibility" is discussed, with an emphasis on its vital importance for practitioners and scientists of social development. The author maintains that it provides a crucial dimension from which to understand how GSW can create a new experience for the world.

One conceptual contribution of bearing witness is the development of a discourse of responsibility that challenges the dominant paradigm of rights and self-interest, which results directly or indirectly in the suffering of others. One important theoretical suggestion is the idea of ethical responsibility for the *Other*, which lies at the heart of Levinas's philosophy (1969). His work can be

read as a radical inversion of dominant ideas concerning the autonomous and self-sufficient individual. We come into being as an individual through a prior relationship with an *Other* and are always tied to the *Other* in a relationship of responsibility because their irreducible 'face' always transcends our concepts, representations, categories, and ideas. This *Other* "shows a face and opens a dimension of height, that is to say, it infinitely overflows the bounds of knowledge" (Levinas, Peperzak, Critchley & Bernasconi, 1996, p. 12). Levinas's work enables us to rethink liberal rights, which are based upon a discourse that assumes that the individual and the pursuit of self-interest is a primary human value and endeavor. In our modern economy, responsibility for others and the environment is secondary. We really are now facing the consequences and paying the price for generations of unfettered pursuit of self-interest, in particular with regards to population displacement and environmental issues. Early scientific and Enlightenment ideas granted man in the western civilization a superordinate position over non-western civilizations and cultures, the earth, and its species. Strangers and the earth—the *Other*—have been objectified and are not seen as entities to which we are tied in a relationship of responsibility. For Levinas (1969), the *Other*, for whom we are infinitely responsible, cannot be reduced to objective knowledge, to our horizon of knowing. A key problem with Enlightenment rationality is, according to Hoskins, Martin, and Humphries (2011, p. 23), "the view that everything is potentially knowable and therefore we can arrive at universal and totalizing truth".

Levinas's concept of "relational responsibility" (Levinas, 1996) can help open up a wider range of interaction in global social contexts, in which the majority of people from a western context are informed of interrelatedness of the self and the world, but do not want to acknowledge their active responsibility for contributing to solutions to many global issues, such as climate change. Many of us know and observe what happens in the world, but remain bystanders. Bystanders who cannot enter into a connection of relational responsibility with those who are suffering are not much different from perpetrators. Furthermore, the distance bystanders feel when they receive information about people suffering on the other side of the world through media, without knowing them personally and experiencing them individually, makes it hard for them to relate. How can a relationship emerge, if the suffering individuals seem so far away? Are we bystanders? Are we perpetrators? And how can we be upstander?

Whole-System Awareness

Are we bystanders? Are we perpetrators? These questions can be regarded as one lens through which one could take on these interconnected global challenges in order to design systems change initiatives. Systems change through making distinctions and recognizing systems, relationships, and perspectives has the potential to raise awareness about one's role in the interconnectedness. This lens focuses on three roles when suffering arises: victim, perpetrator, and bystander. Victims are defined as those who suffer physical and mental damage caused by

perpetrators' conscious or unconscious actions. The former is therefore referred to as the *conscious perpetrator* and the latter the *unconscious perpetrator*. The latter can either reflect on their unconscious behaviors and resulting consequences, or not. Unconscious perpetrators who engage in reflection have the potential to become rescuers, a fourth possible role, by developing empathy. By contrast, non-reflective unconscious perpetrators become bystanders. When confronted with the suffering of victims, they are not able to express their sadness or anger, or might freeze their feelings completely. Without any action, both reflective and non-reflective unconscious perpetrators (bystanders) end up leading to the same result: a profound lack of engagement and moral imperative to do anything. Regardless of whether or not fear and self-preservation might play a role, the result is the same: frozen feelings and no action.

In situations involving victims, perpetrators, and bystanders, people generally like to think that they would not be bystanders (Philpot et al., 2019). What do we need to know and do in order to avoid being a bystander? If we are bystanders, how can we become upstanders? An upstander is someone who "takes a stand and engages in proactive roles to address injustices" (Grantham, 2011, p. 263). When an upstander sees or hears someone being bullied, they speak up. Many people in western countries, however, are rarely able to be upstanders, because they are saturated with images of suffering and violence– even if only through media. People become blunted and paralyzed in their responsiveness and sensitivity to suffering in the world, even though they essentially contribute to this suffering, in direct and indirect ways. A sense of overwhelm can result in silence and skepticism, procrastination, or avoidance of the issue. It has been observed that this also leads to distancing behaviors from the issues in the world, such as physically walking away or mentally closing down the senses (Wilson, 2010).

If we don't want to remain as bystanders, but want to be upstander– especially when we are flooded with overwhelming information through media– *bearing witness* has been proposed as a transitional practice (Orange, 2017). The act of bearing witness in GSW is of utmost im-portance, because it enables whole-system awareness, which integrates the three separate systems of victim, perpetrator, and bystander into an extended system and puts global empathy in action to transform the world. As described in the GSW process in chapter 2, GSW can help participants to think, feel, and sense how things (elements and systems) are related, and how they influence one another within a whole.

Whole-system awareness can be seen as a method to understand how people can be related to each other, their influence, and their function (Meadows, 2008). The aim of whole-system awareness in GSW is to recognize the witnessed, i.e., a human being or another object within society such as the natural ecosystem, as part of the great totality. It must be understood that the witnessed is part of a system and is influenced by this system. These influences affect all aspects of the witness and the witnessed. This awareness of the wholeness can only be made possible through an unlimited, all-encompassing view. One must free oneself

from old, rigid, or obstructive mental patterns, abandon fixed rules and limits imposed by society and its history, and concentrate on the superordinate processes or structures. Only by understanding all the components of a system can one also understand what influences it, and how to use these influences (ibid.).

Through GSW promoting whole-system awareness, victim-and-bystander relationships, cause-and-effect relationships, and interconnectedness, other influencing factors may be more easily recognized, and possibly even influenced. Table 1 shows the difference between bystander, witness, and upstander by illustrating subsystems and the overarching whole system in terms of the cognitive conscious mode (observing), witnessing awareness mode (bearing witness), and prosocial behavior mode (responding).

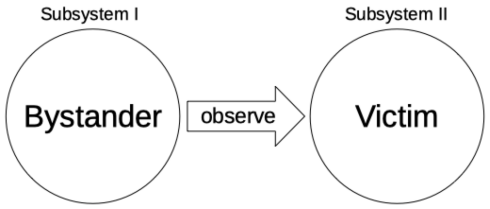
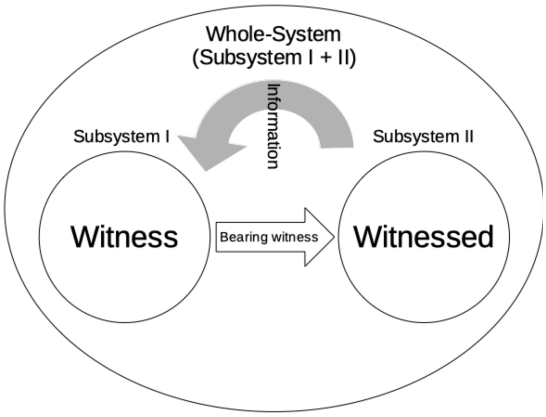
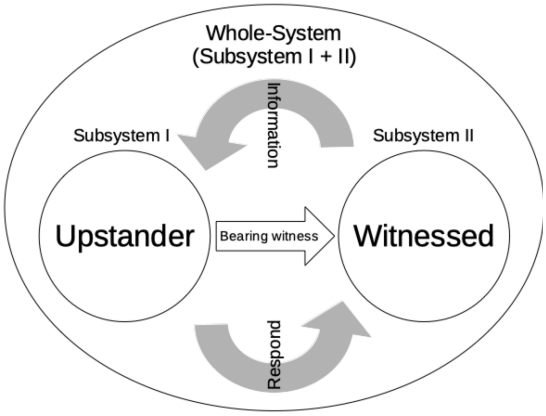
Subsystem		Whole-system	
Bystander	Cognitive conscious mode	is enfolded and insensible	
Witness	Witnessing awareness mode	is unfolded and informative	
Upstander	Prosocial behavior mode	needs to be responded to	

Table 1: Bystander, witness, and upstander in whole-system awareness

A bystander observes somebody who is suffering as a victim. In this "cognitive conscious mode" (Brazdau, 2014) of observation, two subsystems (the bystander and the victim) are separated and a new, larger inclusive system is hidden or enfolded and insensible as a whole system. In the "witnessing awareness mode" (ibid.), through practicing GSW, a witness does not only observe a victim but also witnesses the victim as a human being–the victim becomes the witnessed. In this "witnessing awareness mode", the witness can "look at [her/his] own body, thoughts, feelings, and [her/his] own awareness as a neutral witness, from outside", in other words: "The pure conscious experience of *I am*" (Brazdau, 2014, p. 2). This experience is reported as being frequently accompanied by "an interconnectedness between all there is, between the I and the other human beings, and all the other life forms and nature around you" (ibid.). The separation between the bystander and the victim as subsystems can be transcended through the strong feeling of interconnectedness between the two subsystems, as well as the feeling of interpenetration between the witness and the witnessed. An increased sense of interconnectedness "gives the individual the freedom to be conscious and perceive parts of reality that were hidden" (ibid.). This, in turn, reveals a whole system which includes all subsystems. Locating one's self inside this whole system enables one to receive new information about the whole and to embody a participatory worldview. With this worldview one becomes more motivated to choose prosocial behavior to benefit other people or society as a whole, i.e., the prosocial behavior mode. Many studies in neuroscience have suggested that "the ability to mentalize the experiences of others so vividly can lead us to take prosocial steps to reduce their pain" (Armstrong, 2018). In this prosocial mode one is no longer an observer, but an upstander who takes action with respect to other people and society, as they feel the need to respond to the information from the whole system.

Further Research Questions

When we witness the states of others, we replicate these states in ourselves as if we were in their shoes and feel interconnected. This sense of interconnectedness causes prosocial behavior, which refers to "a broad range of actions intended to benefit one or more people other than oneself—behaviors such as helping, comforting, sharing, and cooperation" (Bateson & Powell 2003). Prosocial behavior is not only local but also global when actions are taken on the global level, such as donating to help suffering children in war areas or working as a volunteer in a refugee camp.

In order to propel global prosocial behavior, we need to establish incentives and platforms that can link individual witnessing to clear actions and visible impact. The author and some researchers of Witten/Herdecke University, who organize an annual international conference of GSW (www.globalsocialwitnessing.org), are developing a new Master's program in GSW. Its aim is to enhance students' witnessing competence for their transformative action research projects in the world.

In order to verify the hypothesis of 'GSW as an educational tool for awareness-based systems change, which puts bearing witness into action to transform the world', the following research questions should be investigated more deeply in the context of GSW:

- Transformative learning: Kiely (2005) How can transformative impact of witnessing self/world on personal and social transformation be described and measured?
- Intercorporeality: Fuchs (2016) To what extent can GSW be conceptualized in terms of social cognition? E.g., how does the practice of GSW increase one's capacity to empathize with and mentalize others' (potentially large group's) inner states?
- Motivational psychology: Kohlberg (1958), Selman (1980) How might the practice of GSW lead to an increased sense of (embodied, global, personal) responsibility?
- Social neuroscience: Singer (2012), Singer et al. (2015), Siegel (2012) Does GSW have the potential to activate and strengthen neural circuits of perspective-taking, empathy, and compassion?
- Discourse analysis in institutions: Brown (2005) Might GSW be able to shift identities from ethnocentric to world-centric in order to foster world-centric narratives?
- Social fields theory: Boell & Senge (2016) How might GSW facilitate the emergence of generative social fields?
- Quantum entanglement: Walach & Stillfried (2011) Can the witness's consciousness of the witnessed event be entangled in impactful ways with the physical event witnessed?

Concluding Thoughts

Three theoretical foundations of GSW–bearing witness, relational responsibility, and whole-system awareness–are all components to connect the parts (subsystems) and to uncover the whole system. Through bearing witness, the witness can perceive their co-existence in the same system as the witnessed and feel responsible for that person. The relationships between the witness and the witnessed and between them (subsystems) and the whole system are characterized as interdependence and interpenetration. These two phenomena are illustrated metaphysically in the story of Indra's net, which was originally referred in the Atharva Veda scriptures of Hinduism, and developed by the Mahayana school of Buddhism in the third century and the Huayan school of Buddhism between the sixth and eight centuries.

> Far away in the heavenly abode of the great god Indra, there is a wonderful net which has been hung by some cunning artificer in such a manner that it stretches out infinitely in all directions. In

> accordance with the extravagant tastes of deities, the artificer has hung a single glittering jewel in each "eye" of the net, and since the net itself is infinite in dimension, the jewels are infinite in number. There hang the jewels, glittering "like" stars in the first magnitude, a wonderful sight to behold. If we now arbitrarily select one of these jewels for inspection and look closely at it, we will discover that in its polished surface there are reflected all the other jewels in the net, infinite in number. Not only that, but each of the jewels reflected in this one jewel is also reflecting all the other jewels, so that there is an infinite reflecting process occurring. (Cook, 1977)

The phenomenon of interdependence is that "all the strands of the net are connected, loosen one, and all are loosened, and sever one, and the whole is weakened" (Thiele, 2011, p. 18). Interpenetration means that "the part is not only connected to the whole by way of multiple linkages, the part actually includes the whole" (ibid.). The Japanese Zen master Suzuki (1959) defines interpenetration as "the One in the Many and the Many in the One" and "the One remaining as one in the Many individually and collectively" (p. 28). For Zen Buddhism's interpenetration asserts that connectedness itself constitutes the most fundamental reality, while interdependence refers to things existing in connection. Some Japanese philosophers such as Izutsu (1983) and Ishii (1998) regard interpenetration as interconnectedness with a cosmic-social power which penetrates and controls the fundamental spheres of human-human, human-non-human, and human-superhuman relationships.

The concept of interdependence and interpenetration of Mahayana Buddhisms influenced the systems theories of Francisco Varela and Niklas Luhmann (Nishi, 2018). Luhmann (1987) brings psychic systems (consciousness) and social systems (communication) under a general description of autopoiesis, without collapsing them into living systems (biotic body-brain). The productions of living systems–consciousness (mind) and communication (society)–are redefined as different kinds of meaning-events. "Meaning becomes the medium in which elements of consciousness and communication may interpenetrate while maintaining operational distinction into separate systems" (Clarke, 2014, p. 13). In interdependent and interpenetrative relations with the Other, which can be experienced through GSW, its participants can realize that 'I' and 'the Other' are always in a joint action which cannot be carried out alone and requires the coordinated actions of both participants. It is not 'me vs. the Other', but 'we' who generate meaning together with relational responsibility. Such a meaning-generating process (meaning-events) experienced by participants of GSW is the awareness-based systems change which may permeate their self-referential boundaries and enable them to become aware of the collective social autopoiesis within the 'social field'. Scharmer, Pomeroy & Kaufer (2021, p. 5) define 'social field' as "the entirety of the social system with an emphasis on the source conditions that give rise to patterns of thinking, conversing, and organizing,

which in turn produce practical results". Moreover, they posit that the source conditions are "co-shaped by the inner condition of individuals and quality of the 'social soil'". In the case of GSW, the inner condition of individuals is their awareness of relational responsibility and the 'social soil' is the coherent container of GSW, cultivated and provided with nutrients by competent facilitators who know "becoming attuned to the interdependence and the interpenetration of all things […] stimulates creativity and community" (Thiele, 2011, p. 19).

In the 21st century, schools and universities have a major responsibility to create spaces in which a "cosmopolitan society" (Beck, 2002) can be prepared for the future. In these spaces, students are encouraged to explore the contours of "cosmopolitan identity" by developing "capabilities to deal with their diverse ways of thinking and diverse contexts of social interaction and to suspend their personal and social identities […] for reflecting on a question 'who might I be really'" (Matoba, 2015, p.14). They can practice GSW, promoting bearing witness, relational responsibility, and whole-system awareness with the open awareness of the transformative attitude with which teachers and students move from a cognitive and affective reaction to the events of the world, to an empathic receiving of this detailed information, and toward a response to this information. If our future is to be cosmopolitan, we need to establish cosmopolitan education in schools and universities. This kind of education is proposed by Scharmer & Kaufer (2013) in the form of a "global action leadership school that integrates science (the third-person view), social transformation (the second-person view), and the evolution of self (the first-person view) into a coherent framework of consciousness-based action research" (p. 242). For this innovative educational concept, GSW can add one more viewpoint: the 'we-perspective' (the first- and second-person view) which promotes relational responsibility. This 'we' is not exclusive, but inclusive. 'We' includes the Other who shows me their face and wants to be witnessed by me. Moreover, this 'inclusive we' is "a multi-species and multi-existent we" (Smith, 2013, p. 30), so that GSW can be extended conceptually in order to establish a new ecology of the human-nonhuman relational responsibility, which meets the exigencies of the moment in view of the perceived impending planetary crisis.

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Relational Systems Thinking:

That's How Change Is Going to Come, from Our Earth Mother

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Dan Longboat, Kahontakwas Diane Longboat, Rick Hill and
Ka'nahsohon (A Feather Dipped in Paint) Kevin Deer

Abstract

We explore the notion of the need to decolonize systems thinking and awareness. Taking a specifically Indigenous approach to both knowledge creation and knowledge sharing, we look at awareness-based systems change via a Haudenosaunee (Mohawk) two-row visual code. The authors explore the sacred space between Indigenous and non-Indigenous ways of thinking and knowing, to identify pathways for peaceful co-existence of epistemologies. Based on conversations with Haudenosaunee elders and Western systems thinkers, along with data from a DoTS webinar, we identify cross-cultural dialogues as a doorway to healing, to transformation and to spiritual understanding. A reconnection with Mother Earth and with each other is fundamental to disrupting global patterns of trauma and mass corrosion of the spirit.

Keywords

Indigenous Knowledges, decolonizing, mother earth, healing

Kevin Deer: I was at a conference in Montreal because it was dealing with soils, which is an extension of Mother Earth. I talked to them about my experiences of fasts and vision quests, and about the personal healing that I had to do. Before that, I believed that babies cry, weaklings cry, but real, as a real man, I don't cry. Anyway, through the *Midewiwin* Lodge teachings when they put you out, it's usually before the sun sets. So, in that lodge, I'm asking myself, if this lodge represents my life, so I have to go back to my earliest recollection, where there was pain and hurt. If there's hurt and pain then I have to go back and give this pain back to my first mother, which is Mother Earth. In the construction of my lodge, there is one sapling in the ribs of my lodge that represents my life's journey. I ask in Onkwehonwehneha "Mother how can you heal me?" Because my biological mother is still alive, and she can hug and console me but how do I strengthen my mind about these teachings because I was doubting it. So, I put my tobacco down and waited for some kind of answer or sign that would strengthen my mind that this is a powerful healing ceremony. Eventually, a strong woman's voice spoke in my mind and said, "You see this soil, it's an extension of my body, so lay down and cover yourself with it." I laid down on my back almost naked and covered my body with handfuls of this rich black soil. As I covered my body with this soil, in my mindset it was like these hands and arms came out from earth and began to hug me, from my first mother.

Peter Senge: We once had a meeting in South Central Colorado, 200 miles north of Taos, New Mexico. There's beautiful land there, used for thousands of years for spiritual retreat, anyhow we had a small group there. And there was one woman from China, 35 years old or so, a skillful facilitator, I've worked with her in China, but she grew up as a modern young Chinese person, which means she had like zero contact with the natural world. So, there was the opportunity for people to sleep on the land, they didn't have to, but there was that opportunity. We had organized it so they could get sleeping bags and tents. It was a pretty chilly time of year, early October, so it was cold enough that it was a little daunting. And this young Chinese woman had never slept outside in her life. But two people who had spent a lot time camping outside said they we're going to put their tents on both sides of her and she could sleep in the middle and said they would be right there if she needed anything. I can recount a few times where people were so disconnected from nature that they were literally terrified of being alone on the land. So anyhow I'll make a long story short, it was quite an adventure. They made sure she had a really warm sleeping bag. I saw her about three days later, and she had spent three nights with the two guys close by, sleeping on the land. I've known her for about 10 years and when I saw her at the end of this time, I'll never forget her comment, she said 'It was the first time in my life I've been happy, really happy.' She

'Wow!!! Imagine that my mom is hugging me, healing me, and helping me to love and forgive all who have hurt me and for me to come to terms with all who I have hurt and all of that.' I was feeling such elation that I said to myself, if I could choose the moment of my death, I would want it to happen right now at this particular time. This was a pretty profound experience. I imagined that if I had not done this ceremony, I would have died one day and lowered back into the womb of my mother the earth, dead, but here I am going into her womb alive, experiencing it and being able to talk about it. But then all of a sudden self-doubt enters my mind, and asks "did I just make it up?" I was immediately feeling disappointed and let down. So, I put my tobacco out again, I said '*Ista* [my mother] you gotta give me something more stronger than this [laughter], that is going to clarify and strengthen my mind without a doubt.' I put tobacco down and within a short period of time she spoke again now saying in my mind, "Ok get up walk around this circle and count your footsteps." I get up, brush off myself, try to think what could that mean. I begin to walk heel to toe and count my footsteps as I follow the cedar circle ring that encompasses my lodge. Where I get to the spot from where I started out from there is a number. The cedar circle, from the teachings I know represents everything in my life past, present and future [inside the cedar circle]. The magical number is 36. When I verbalize it as I'm counting, I immediately got down on all fours and I kissed my mom, because from that moment onward I said to myself, "I said, 'I've been happy when I did good on a test and I've got all these things I want in my life, but I realized that that happiness isn't real happiness.' And as we continued our meeting, she kept going back to sleep on the land each night. So, the rest of us were sleeping inside meanwhile, she slept on the land every night for seven nights. And I will never forget the other thing she said, 'I've never felt held by the earth, I lay there in my bag at night and I know the earth was holding me.' It was just such a beautiful reminder of how many people, really more than ever before, are growing up with this complete separation. So, Mother Earth, if you don't know your mother, you are kind of lost. So, it's not a small thing.

> don't care what other people may conclude about this personal intimate experience that just happened when I tell this story, because they can't experience it, they're only hearing a story. But we established this connection, Mother Earth and one of her beloved sons of the Earth Mother. So why was that number so significant? 36 footprints and I was 36 years old. I was also opened up and began to finally allow myself to cry and feel the feeling that I had suppressed for so many years. I forgave myself, I forgave others, and let all the baggage and negativity in my life go. I was renewed from head to toe [transformed]. I tell this story now, at this conference on soils, after I did the opening. This was my experience… Change is going to happen from people going inward within themselves and along with going back to having communion with their first mother, Mother Earth. That's how change is going to come, from our Earth Mother. Because if this could happen to me it's going to happen en masse … and many people who are spiritually grounded are going to know what's happening, but the ones who never connected to the earth will not know what's going on.

Introduction

Boozhoo nindinawemaaganidok (greetings my relatives). *Anishinaabekwe indaaw* (I am an Anishinaabe woman). She/Her. *Mooz indoodem* (I am moose clan). *Biigtigong Nishnaabeg izhinikaade ishkonigan wenjiiyaan* (is the name of the First Nation that I come from). *Waabishki Ogichidaakwenz-anang* and *Waaba-anang Ikwe Anishinaabemong idash* (is what I am known by the spirits in Ojibwe). Melanie Goodchild *indizhinikaaz zhaaganaashiiong* (what I am called in English). The seven of us, Melanie (Anishinaabe), Peter (American), Otto (German-American), Dan (Haudenosaunee), Diane (Haudenosaunee), Rick (Tuscarora), and Kevin (Haudenosaunee) have recently joined together in what

might loosely be called a Circle of Presence (Scharmer, 2009, 2016, p. 374) around the notion of the need to *decolonize* (Smith, 1999) systems thinking and systems awareness theory and practice. For stylistic purposes, I (Melanie) will serve as the narrator.

Recently, I had the honour of being in conversation with the Haudenosaunee Elders and Knowledge Keepers and also with Peter and Otto to talk about 'awareness-based systems change.' I spent time with Peter and Otto at the Executive Champions Workshop (ECW) in Stowe, Vermont in 2019, in addition to which we collaborated on a Dialogues on Transforming Society and Self (DoTS) webinar (episode 6)[1] and the Global Activation of Intention and Action[2] (GAIA) series of webinars by the Presencing Institute. I am also a Faculty member with Peter at the Academy for Systems Change[3]. In writing this article together we are attempting to reflect, and perhaps model, a more relational disposition to collaborative knowledge creation and sharing. It is ultimately a quest, an ongoing journey as Aikenhead & Michell (2011) describe, a quest for us to become wiser. Conventional systems-based approaches to tackling wicked problems have epistemological foundations in the Western scientific method that pursues 'knowledge' in an analytical way, whereas Indigenous ways of coming to know, as practiced by Elders, is the pursuit of 'wisdom-in-action' (Aikenhead & Michell, 2011, p. 69). 'Fragmentation and isolation' is a belief that understanding lies in studying isolated things and this mindset still dominates everyday affairs (Senge, Scharmer, Jaworski, & Flowers, 2004, pp. 190-191).

Peter told me during one of our conversations in Cambridge, "I came to MIT originally as a graduate student studying something called system dynamics here at MIT." He explained: "There are lots of different western-based types of tools for how to do systems thinking. System dynamics is especially good at helping yourself and others think more deeply about 'underlying system structures.' It's really this *epistemology*, this way of making sense of the world that underlies a systems perspective in my mind." Peter suggested: "You don't even have to use the word 'system' … so people don't get hung up on what do you mean by 'system'. There are a lot of different tools that you might say are diagnostic for moving from what's on the surface, what's visible, to what's not visible, to the deeper sources of the forces that shape social realities." Perhaps, too, the word 'system' in English conveys it as a noun, whereas in *Anishinaabemowin* (Ojibwe) a system would be a verb, dynamic and imbued with spirit. And that spirit is in relationship with other spirits.

This article is a process of co-inquiry in a *sacred space* between Indigenous (the Elders and I) and non-Indigenous (Peter and Otto) systems thinkers. We

[1] See https://www.presencing.org/news/news/detail/b2c6a7b3-4d97-4534-83f3-4914818c84d5

[2] See https://www.youtube.com/watch?v=dpucs12iAZw

[3] See https://www.academyforchange.org

consider cultural and spiritual perspectives about the role of consciousness in awareness-based systems change. Our intended audience includes both Indigenous and non-Indigenous scholars and practitioners who seek a mature, balanced, and peaceful co-existence of distinct knowledge systems in their own scholarship and practice. Europeans and Native peoples historically held different worldviews and we found it difficult to relate to each other in understanding and compassionate ways. It is a schism that still exists in understanding between Indigenous peoples and Western society, says Cree scholar Willie Ermine (2007). The primary goal of this paper is to attend to a deeper level of consciousness that exists in a particular teaching place, a place *between epistemologies*. This space in-between has been referred to as the *ethical space* (Ermine, 2007). It is a place that affirms human diversity, where we "detach from the cages of our mental worlds and we assume a position where human-to-human dialogue can occur" (p. 202). It is a space/place that is respectful and generous of spirit, so that we can begin to release "that kind of energy" as Peter once said (C. Otto Scharmer, 2009, 2016, p. 51). The idea of ethical space is a useful construct because it is "predicated upon the creation of new relationships between Indigenous and non-Indigenous peoples" (Kapyrka & Dockstator, 2012, p. 109). This sacred space enables a mindset of *connection* rather than *separation*, that allows us to access our deepest capacities for unconditional love (Scharmer, 2020).

In December of 2019, I had tea with *Rotinonshon:ni* (Haudenosaunee—People of the Longhouse) Elders and Knowledge Keepers at the Gathering Place by The Grand, at Six Nations Grand River Territory. The Six Nations consist of the Mohawk, Oneida, Cayuga, Seneca, Onondaga, and Tuscarora, unified under the Great Tree of Peace. I was there to be *in conversation* (see Kovach, 2010) with the Elders and knowledge keepers through *asemma* (tobacco), a tobacco tie offering (see Wilson & Restoule, 2010). Tobacco offerings to the Elders recognizes that their knowledge is often revealed to them from the *spirit world* (Johnston, McGregor, & Restoule, 2018). As an Anishinaabekwe (Ojibway woman) living and working in traditional Haudenosaunee Confederacy territory, it is important that I am guided by their philosophies as much as my own. I invite you to also hear the teachings of the Haudenosaunee 'intelligentsia' (so-called in laughter) that day. Each respected Knowledge Keeper, my Auntie *Kahontakwas* Diane Longboat, Turtle Clan of Six Nations; her brother, my Uncle *Roronhiakewen* (He Clears the Sky), Dr. Dan Longboat, Turtle Clan of Six Nations; *Ka'nahsohon* (A Feather Dipped in Paint) Kevin Deer, Faithkeeper at the Mohawk Trail Longhouse, from Kahnawake Mohawk Territory; and Rick Hill, Beaver Clan of the Tuscarora Nation of the Haudenosaunee at Grand River, accepted the invitation from me to gather and talk about awareness-based systems change. On that mild day in December, beside the Grand River, I respectfully asked Kevin Deer to help begin the discussions in a good way, with the Words That Come Before All Else, the *Ohén:ton Karihwatéhkwen* (the Thanksgiving Address). And then the magic happened, the Intelligentsia started sharing stories.

Indigenous-Settler/Colonizer Relationships: Independent and Interdependent

How do you incorporate multiple ways of knowing, in a respectful way, into the practice of awareness-based systems change? This is not an easy task. Indigenous scholars have explored the nexus of Indigenous place-based wisdom and Western science and have called for an approach that privileges and honours Indigenous intellectual traditions emanating from spiritual wisdom. They have described this in a variety of ways, as *braiding* (Kimmerer, 2013), as *bridging* (Aikenhead & Michell, 2011), as a *circle of relationship* (Cajete, 2000), as *encompassing holism* (Kovach, 2009), as *grounded normativity* (Coulthard, 2014), as *resurgence* (Asch, Borrows, and Tully, 2018), as *regeneration* (Simpson, 2011), as *insurgent* (Gaudry, 2011), as *regenerative* (Tuck & Yang, 2019), and ultimately as an exercise in *humility* (Wildcat, 2009). Indigenous scholars have critiqued research more broadly, cautioning us against embedding Euro-centric values, the objective-versus-subjective and nature-versus-human dichotomies of Western thought (Deloria Jr., & Wildcat, 2001, p. 15) into our research praxis (Smith, 1999; Kovach, 2009; Wilson, 2008; Brown & Strega, 2005; McGregor, Restoule, & Johnston, 2018). Western scholarship for the most part, offers us preconceived theoretical perspectives representing "a Western understanding of how the world works" (Browner, 2004, p. 9). A journey to the nexus of Indigenous wisdom and Western thought begins with an important realization, that both are *equal but differentiated*. In this article, we would like to explore a further conceptualization of the nexus, inspired by the spirit and teachings of the Haudenosaunee *two-row wampum belt*.

"*Kaswenta* is a word that applies to all wampum belts, not just the two-row," says Rick Hill. Wampum belts are a part of the Mohawk culture as well as other Nations, including the Anishinaabeg. One of the most famous uses of Haudenosaunee two-column thinking is the Two-Row Wampum belt, properly called the *Tekani teyothata'tye kaswenta* (two-row wampum belt). Rick published, along with Daniel Coleman, the most complete oral history that exists today of the ancient treaty known as the Two-Row Wampum and also the *Tehontatententsoterotahkhwa* "the thing by which they link arms" Covenant Chain wampum belt (Hill & Coleman, 2019). The Covenant Chain embodies these wampum belts; it is the complex system of alliances between the Haudenosaunee and the Anglo-American colonies originating in the early 17th century. Following the chain metaphor, the more formal agreements required a change from an iron chain, which tended to rust, to a silver one. The silver chain will not rust, but it will tarnish, and we need to polish it from time to time[4]. "Repolishing is a process," says my Uncle Dan Longboat, "it *brightens our minds* and it renews our mutual understanding of peace, friendship and respect." This

[4] See https://youtu.be/G7aZZrgRnQo

article explicitly privileges Indigenous ways of knowing through telling stories in a two-row visual code. It is intended to brighten our minds.

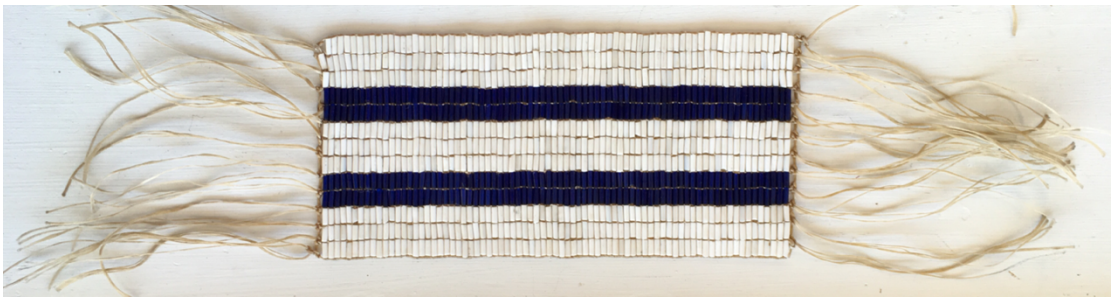

Figure 1. Two-Row Wampum Belt

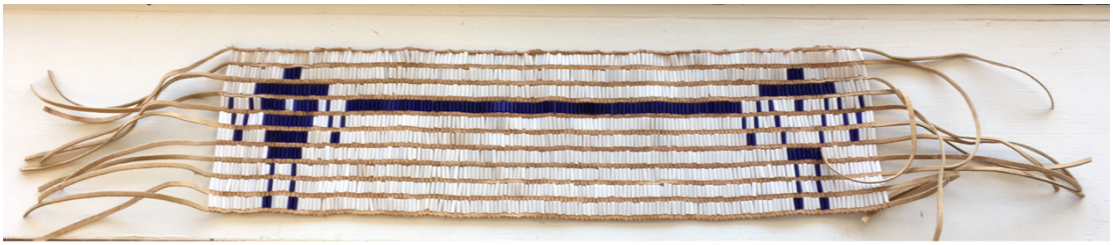

Figure 2. Silver Chain Covenant Wampum Belt

Source: https://trentmagazine.ca/services-view/law-land-teyotsihstokwathe-dakota-brant-06-examines-canada-150-plus-video-walrus-talk/

The 1613 Two-Row Wampum treaty was formed between the Haudenosaunee Confederacy and the Dutch merchants arriving near Albany, NY. The Treaty belt is made of two rows of purple wampum beads, symbolizing the Mohawk canoe and the Dutch sailing ship, "and these two rows have the spirit of the Haudenosaunee and the Dutch" (Ransom, 1999, p. 27). The oral history of the Two-Row agreement was recited in public multiple times by Grand River Cayuga chief and Faithkeeper Jacob Thomas before his death in 1998. The two purple rows, which themselves are made of two columns of beads, signal internal pluralism even as they remain parallel and never intersect. "The three white rows, which are each three beads wide, symbolize the ne'skennen (peace), karihwí:iyo (good word or way), and ka'satsténshsera (unified, empowered minds) - Chief Thomas translated these as peace, respect and friendship–that will allow the two vessels to share the ever-flowing River of Life" (Coleman, 2019, p. 65). So, today, we are all traveling down the river of life together, but with each people in their own vessel with their own beliefs, languages, customs, and governments. "Native and non-Native peoples are to help each other from time to time, as people are meant to do, and their respective knowledge systems, or sciences, are tools to be used in this partnership" (Ransom & Ettenger, 2001, p. 222). We are to take care of this river as all of our survival depends on a healthy river (Ransom, 1999, p. 28).

The two-row wampum treaty explicitly outlined a *dialogical* Indigenous-European framework for how healthy relationships between peoples from different 'laws and beliefs' can be established. Dialogue, says Otto, is not about two parties talking to each other. Dialogue literally means 'meaning flowing through.' Hill and Coleman (2019) argue that the treaty conveyed the concept of reciprocity between autonomous powers and serves as a guide for cross-cultural, cross-epistemological research (p. 340). "The purpose of the Treaty is to recognize that each People is to travel down this river, together, side-by-side, but each in their own vessel. Neither is to try to steer the other's vessel" (Ransom, 1999, p. 27). Conscious of these differences in their ways of knowing and living, "the two parties could better understand how to share the river of life in equality and friendship" (Coleman, 2019, p. 65). The Dutch transcription of this Treaty was on parchment paper, while the Haudenosaunee leaders chose to record the Treaty with a Two-Row Wampum belt, made from small tubular shell beads woven into symbolic designs. The different recordings of the agreement demonstrate the 'two paths' of their different knowledge systems (Hill & Coleman, 2019, p. 347). The Mohawks and Dutch were "very aware of translating between cultural codes and knowledge systems, a process that requires both differentiation and equivalence" and that "healthy relationships recognize rather than suppress differences and that the impulse to overwhelm and absorb the other into a hierarchical relationship can chafe and destroy peaceful relations" (Coleman, 2019, p. 67). Rick told me that the safe space between the two peoples is created when both parties commit to truth and respect, which then grows into trust (personal communication, 2020).

Dialogical Framework: Two-Row Methodology

Written texts add "additional complexity" in transmitting Indigenous ways of knowing, "given that most Indigenous cultures are oral" thus we submit to you, dear reader, that some of the teachings offered herein may lose "a level of meaning in the translation into written script" (Kovach in Brown & Strega, 2005, p. 27). Indeed, it is difficult to translate "spiritual languages, and the broad concepts they represent, from one language to another" (St. Pierre & Long Soldier, 1995) but the times we find ourselves in call for us to try. We are willing to attempt the "troublesome task of criss-crossing cultural epistemologies" that occurs when we share Indigenous knowledge and wisdom in a non-Indigenous language (Kovach in Brown & Strega, 2005, p. 27). The history of 'epistemic violence' and 'epistemic ignorance' (Kuokkanen, 2008) within the academic world has often meant that "Western knowledge and worldviews retain a highly disproportionate amount of influence such that any effort to put them into conversation with Indigenous knowledge must be acutely aware of this historical and ongoing imbalance" (Ahenakew, 2017, p. 86). There is also our reliance on our collective modern culture to 'transmit' understanding, says Peter, as opposed to, for example, contemplation and listening to nature. To guard against this

imbalance, we are anchoring our discussion firmly within the two-row teachings of the Haudenosaunee peoples, as Uncle Dan shared with me:

> One of the things that's really central, I think, in engaging with different perspectives and different knowledge systems, in how they interact, is this idea of *sacred space*; it is really about ethical space. Within our context of it as Haudenosaunee, whenever individuals or two things come together to make an agreement, whenever they collaborate, whenever they do that it is two individuals coming together, then the space in between them is the sacred space; you can kind of think about it in terms of how they are respectful towards one another, how they are caring and compassionate towards each other, how they are empathetic with one another. Now looking at prophecy, we talk about this idea of the two-row wampum belt, the Europeans and Indigenous peoples, or now any people that come to North America, and our relationship together exists in the space in between. It is the sacred space, those principles of peace, friendship, and respect, that becomes the sacred way that we work towards one another, but the idea behind it is that we are both sailing down the river of life together. And our responsibility is to help one another but more specifically, the river of life is in danger right now and there will be no more river of life. So, it behooves us now to utilize our knowledge together to work to sustain, to perpetuate, to strengthen the river of life. Why? So that all life will continue. And at the end of the day any social innovation or systems stuff should be all about the continuation of life and however we understand it to be—not just human life but all of it, for this generation right to the end of time.

Figure 3. Photo of Roronhiakewen (He Clears the Sky) Dr. Dan Longboat

The concept and spirit of the two-row wampum has been suggested as a framework or model for simultaneous intellectual *co-existence* by Anishinaabe environmental scholar Deborah McGregor (see McGregor, 2011; McGregor, 2009; McGregor, 2008), as the fundamental form of *reconciliation* between Indigenous peoples and settler peoples, that recognizes independence and interdependence, in Indigenous-settler relationships (see Asch, Borrows, & Tully, 2018), and as a model or conceptual framework *for non-interference* in cross-cultural research by non-Native scholars (see Evering, 2016; Sweeny, 2014; Latulippe, 2015). In our presentation of these stories and teachings we take inspiration from Mohawk poet Peter Blue Cloud's two-column poems, and Daniel Coleman's (2019) analysis of his work.

Excerpt from Peter Blue Cloud's (1933-2011) poem First Light (cited in Coleman, 2019, p. 54):

First light, a dark outline	evening
Of a mountain peak and	too
Pines their morning scent	will
Carried on first breezes,	call,
stars naked brilliance	to
pulsing to coyote cries	sleep
And keening chorus,	again,
a cricket's tentative chirping,	the
long pauses,	mind
the fall of an oak leaf	is
a bird's sudden question,	dreaming,

Peter Blue Cloud's poetry is a collection of two-column poems. The left-hand column presents Creation as alive. By contrast the right-hand columns descend in one-word lines that trace, in very spare language, an essential thought or growing realization that runs like a thread beside the lush imagery of the left-hand column (p. 56). How are we supposed to read poems laid out like this? One column at a time? Should we read across from left column to right, asks Coleman. The point is that you cannot read Peter Blue Cloud's two-column poems without being confronted with your own habits of thought, your own assumptions about how to make meaning. These habits are "challenged and made conscious by your simultaneous encounter with more than one way of doing things" (p. 56). And that is our point of departure.

Equal But Differentiated

Following the dialogical model laid out in the Two-Row Wampum-Covenant Chain agreement and taking inspiration from Blue Cloud's two-column poems, this article is written, with a presentation of two-column stories. Blue Cloud's poems "remind us that contemporary engagements with Two Row tradition operate, as did the original agreement, within a dialogic domain, not some realm of singular cultural purity" (p. 69). That said, argued Coleman, there is value in keeping one's inheritances distinct. We do not intend here to divide Western and Indigenous worldviews neatly between the two columns, even if we appear to do so. Instead, the two ways of seeing and sensing systems are presented in both the left and the right columns and in the space in between. While most of us trained in the Western traditions of the Academic world have been taught to rely on our "chronically overdeveloped reason" (Sheridan & Longboat, 2006, p. 373) we

instead invite you to sit in circle with us, to practice *generative listening* (see Scharmer, 2009, 2016, p. 12). Our intention is that you are no longer the same person you were before you heard these voices. The topic of discussion was simple yet profound: How do we sense and then shift systems? As you continue reading, here are some practice guidelines for reading two-column thinking. You may find yourself reading one column at a time, perhaps that is how we are conditioned to read it. Instead, you are invited to read the text initially in whatever is your most natural way, suggests Peter. Then, go back and read by going back and forth between the columns every few lines. Try to hear each person's voice as you do this; and then imagine they are talking with one another. See what emotions and feelings are stirred in you as you do this.

We began this article and now continue in the two-row visual code:

Dan Longboat: Systems change for me really is about opening those pieces up, those things are all there, and connecting to that knowledge because that's knowledge that has carried our ancestors. Again, the origin of that knowledge as we come to understand it is, unlike the West, none of the knowledge has come out of the minds of men or women. Particularly in the West, too, it's come out of the minds of men, what about women's minds? If that's how you want to live, okay, sure. But what about women's concepts within Western knowledge, it was totally ignored. So, because of that it's built on a form of paternalism, paternalistic ideas, and at the same time it's based on ideas of power and control. Things have now gotten out of control. We are now going to see fundamental change in the world and we're going to regress ourselves and to pull ourselves back in to restore that sacred feminine, predicated on kindness and compassion, caring, love, that's the real impetus of change. If systems theory and practice can conscience us to that way

Peter Senge: We're not going to change the world, I hate language like that, or teach people to be systems thinkers, but we might find some ways for people to rediscover their innate capacities and love; it's not an intellectual capacity only, it's deeply rooted in an emotional experience. Interconnectedness is a big clunky word, but we also call it beauty. In that moment when you experience something beautiful what happened to the 'you?' You are not even around anymore. Whatever you see is still there, but something happens to transcend that object or phenomenon and you, and beauty just exists. So that's the interconnectedness, that's when that sense of us as separate, our embodiment which is how we navigate the world, somehow is held in abeyance. And something else emerges. So that's not something that has to be taught, but there's a lot of shit that needs to be unlearned. And I do think, this is obviously where the cross-cultural dialogues are so important. Maybe some of the cultures that are around today are a little more wise on this, and maybe one of our

of understanding the world, then we'll see some really fundamental change but unless it does that, it will be same old same old. Because the authority for our knowledge as Indigenous peoples has come from a place of spirit not out of the minds of men and women. Because it has come out of a place of spirit it is perfect, perfect, and it served our ancestors well for thousands of generations. And it will continue to serve us and we have a choice of whether we want to recognize that, authenticate that, activate that and put that process back into place, to help us see the entire system and what's our place in that. It's all about peace, it's about love, it's about compassion, it's about all of those things that come out of the *Ga'nigoi:yah* (the Good Mind), that's what the Good Mind is. So, it's bringing back the Good Mind.

problems with the dominant Euro-centric Western culture, modern global culture, is we've lost a lot of this wisdom.

Otto Scharmer: How do we sense systems? With our senses. With all our senses. Sensing is a funny process. Most people think they know how to do it. But I claim they don't. People, particularly people who have gone through traditional Western training and education, tend to miss any real education of the senses: how to deeply listen, how to really pay attention, how to actually sense the *resonance* of a social field. The late cognitive scientist Francisco Varela once suggested that 'we need to become blackbelts of observation,' i.e., we need to upgrade our skills to sense and to see. That idea is so much needed today.

What happens when we sense a social system? We sense its interiority. That's what I call a *social field*. A social field is a social system seen not only from outside (3rd person view), but also from within (adding the 1st and 2nd person views to scientific activity).

Sensing a social field means to sense social resonance. Resonance is an interesting term. Resonance is neither entirely subjective, nor is it entirely objective. It lives in the space between. Like the sacred space that you, Melanie, talked about earlier, the sacred space between epistemologies. Moving into this deep sensing is very much an aesthetic phenomenon, as Peter suggested. The word aesthetic was coined in 18th century Germany and comes from the Greek word 'aisthētikos', literally meaning the perception by the senses. Decolonizing

Rick Hill: Knowledge is innately tied to the land, it's right there, it's waiting for us to pay attention to it, to guide us, through dreams, through visions, through practice, and maybe that's our greatest strength, is getting people reconnected to the source of knowledge. Removing their blinders, unclouding their ears, giving themselves to it so there will no longer be an impediment to our viability as a Nation. What does it take to empower the next generation of thinkers? The last seven years we've been doing a recitation of the Great Law in all of our communities and we're getting better at that, but what we haven't done is a regular recitation of our Creation story. That is the roadmap to this interconnected web, this is the ultimate system that we exist by, and I think in the end if you compare Nishnaabek creation and Haudenosaunee creation in this region there is a commonality about why the world was created and why humans were created to inhabit the land. That's the knowledge we need to uncover. When you can re-visualize creation as a whole entity, a functioning entity beyond the sky world to below the turtle, when you revision it in three dimensions and Dolby stereo you will then innately understand your relationship and your place in that universe. And you won't need a textbook or somebody to explain to you what you need to be doing, you will embrace it. That's what I meant by having faith in the systems thinking starts with decolonizing and rehabilitating our senses. Because there is a knowing in our senses that we need to uncover and cultivate.

Peter Senge: So, this kind of awareness, now illustrating in the social domain of interconnectedness and interdependedness, is innate. This is who we are. I really believe that deeply, the problem is like anything, if it's not cultivated it will atrophy; particularly in contemporary cultures it's not being cultivated because, as we found ourselves moving from hunters and gatherers, our oldest organized forms, to agriculture or to urban life, basically we stepped further and further away from the natural world and in doing so we stepped further and further away from the natural teacher of an interconnected, dynamic, systems perspective.

unseen. It's worked for 10,000 years. It's begging us now to re-engage with it.

Dan Longboat: When we talk about systems, solving problems, the realization that many of the problems that we've heard about today and are examining, you know the larger context of modern society at large, that whole process around the West's disconnect from the environment, has resulted in so many of the problems that we see today, everything from extinctions, loss of biodiversity, global contaminants and toxins, etc., etc., all under the umbrella global climate change. So, the systems piece needs to engage with, and work towards, and recognize, and work to resolve or reconnect to the environment somehow. It is a reiteration of this need to reconnect with the environment. In terms of systems, instead of looking at one-off pieces, it's looking at the whole thing, looking at the whole system the way our ancestors did, the seen and the unseen, the past, present and future, the spirit, the earth and all of a sudden, that's a whole system, that's what we need to bring back.

Peter Senge: What we tend to do in Western cultures is abstract. This cultural habit of abstracting as opposed to, if this was a word, "concreting," getting your feet on the ground, feeling it and smelling it. At Executive Champions Workshop the thing that most bemuses me about it after all these years, people ask me how it works, and I can honestly say I have no clue really. I just say, well we hang out in the field. And we let the field go to work on us. Because that's my experience. Of course there's teachings and that's good, and they need to be to the best of your ability harmonious, with a deeper process. And it is that deeper process that somehow goes to work on people. I've watched it so many times and it's like watching a beautiful flower unfold. People by the third day are just starting to relax and they are really noticing what it feels like. I've watched some people, a good friend who is a senior person with the Nature Conservancy, his whole life is about this. It's not like this was a new discovery to him, but by the end of the three days, he was in like a transcendent state, he was so clear, so quiet, so thoughtful. It was clear he was reconnecting with what he knew was his purpose in this lifetime and it was beautiful.

Diane Longboat: We also had a message in our lodge about that, that by proxy, because these people [Westerners] were not created to be here. By proxy we are the ones with our fires, and they need to come to us

Peter Senge: One of the fundamental issues you will wrestle with, Melanie, are those paradigmatic distinctions between Native cultures and let's call it modern or Western cultures, is that you're understanding lives in stories,

with that honour and respect and humility, to be able to heal and to connect to their ancestors. And they always need to be told that you come from a place that is your homeland. To tell them consistently, the white people that come to our ceremonies, we are happy to share our sacred fire with you because at this fire is the essence of life, of who the Creator is. If you make your offerings, you make your prayers, have your fast, your vision quest, or whatever, we'll help you with that, but you've gotta do your work to find out who is the Creator and what does the Creator want you to do in your life, how do you activate that spiritual mandate that is in your life. We'll help you with it but in that journey of your healing, you need to go back to your homelands, walk in the places of your ancestors, and that will change you forever. Because that is where you belong and we are sharing this land with you, and we also have a duty to share with you how to respect and honour these homelands, and you need to live with those natural laws and those spiritual laws that govern Turtle Island [North America]. You come here and we're not interested in your passport, we're interested in if you will adhere to these natural laws and spiritual laws.

at least your expression of your understanding, lives in stories. These stories are of course archetypal, they are dynamic, there is always an unfolding going on, whereas Western culture which has largely displaced other cultures over the past several hundred years, particularly the last 75, privileges abstractions; succinct, clear, de-contextualized characterizations. "Tell me what you know; don't tell me a story." We go from lived experience, something you can touch and feel and tell stories about, to an abstracted description and we consider that a higher form of knowledge. We consider that more refined, which is kind of bizarre in a way. They both have a function, and my bet is if we really explored this abstracting phenomenon, we would find similar phenomena in the ways of understanding of Native peoples, but it would be different because it would be so grounded in the lived experience.

I think the danger of the Western approach is that all you get is abstraction, you end up with almost no lived experience. Somebody is considered an expert because they can talk a lot about something, or they've written books about it. In the social science or the domain of human living, the consequence of this disconnected abstracting is that we struggle and struggle, with how to 'implement' ideas, how to do it, because we start off thinking that's a lesser kind of knowledge. This creates a false dichotomy between knowledge of the head and knowledge of the hand. You didn't learn how to 'implement walking' when you were two years old. You learned to walk through an

ongoing process of doing and discovering.

This dichotomy between knowledge of the head and knowledge of the hand has deep cultural roots in the West. Michaelangelo could not have a meal with his patrons, because he worked with his hands. Because his knowledge was of his hands, it was a lesser sort of knowledge and that defined his class status. So, these are deep issues in Western culture.

Otto Scharmer: I like Peter's distinction between abstracting and concreting. The problem with traditional approaches to Western science is the misconception that only the former is considered scientific. But that is actually not true. The distinction also reminds me of the work of the British philosopher of science Henri Bortoft, who in his book the *Wholeness of Nature* differentiates between two types of wholeness: the *authentic whole* and the *counterfeit whole*. The counterfeit whole is based on abstraction and more traditional rationalistic approaches to science. The authentic whole is the living whole. To encounter the authentic whole, we need a new methodology that he traces back to the phenomenological work of the German poet Goethe. To apprehend the counterfeit whole, we need *to step back* and abstract from the individual parts. But to apprehend the authentic whole, we have to step in to sense the particulars, because the authentic whole is not separate from the parts, it is, as Bortoft puts it, *presencing itself through the parts*.

What results from this second methodology is a view in which

humans consciously participate in nature by presencing the authentic whole moment to moment. That might be an agenda for 21st century science: to decolonize the knowing of the senses, and to develop and cultivate a scientific methodology that allows us to sense and presence what Bortoft calls the living authentic whole. Such a method needed to blend systems thinking with systems sensing and advanced phenomenological practices that integrate 1st, 2nd, and 3rd person knowledge. Maybe our conversation here is part of such a path.

Discussion: Bringing the Soul to Systems Work

A few years ago, Senge, Scharmer, Jaworski, and Flowers (2004) said the time for this type of cross-epistemic dialogue is now because "We may not have the luxury of waiting two or three centuries for a science of connectedness to create a wiser society" (p. 189) and, further, as complexity increases "the need for wisdom grows, even as that wisdom atrophies" (p. 209). Each of us has access to distinct *gakiikwe'inana* ('teachings' in Ojibway language) and in the Haudenosaunee two-row thinking we value these teachings as different yet equal. So how do we bring these teachings together in a good way? Mi'kmaq Elders, Albert and his late wife Murdena Marshall, offered us all a way to make sense of this cross-epistemic dialogue. *Etuaptmumk* is the Mi'kmaq word for *two-eyed seeing* (Bartlett, Marhsall, & Marshall, 2012; Hatcher, Bartlett, Marshall, & Marshall, 2009; Sasakamoose, Bellegarde, Sutherland, Pete, & McKay-McNabb, 2017). The two-eyed seeing approach brings together Indigenous knowledge systems and mainstream knowledge systems "side-by-side" as in *Toqwa'tu'kl Kjijitaqnn*, meaning "bringing our knowledges together" (Bartlett, Marshall, & Marshall, 2012, p. 333). Two-eyed seeing seeks to avoid knowledge domination and assimilation by recognizing the best from both worlds (Hatcher, Bartlett, Marshall, & Marshall, 2009). Two-eyed seeing allows one to make conscious decisions "to activate whichever lens is more appropriate to use or a harmonization of both" (Sasakamoose, Bellegarde, Sutherland, Pete, & McKay-McNabb, 2017, p. 9).

This journey into ethical space begins with us collectively recognizing that "spirit" actually exists (Stonechild, 2016, p. 51). Capra (2007, cited in Capra & Luisi, 2014) argued that modern scientific thought did not emerge with Galileo, but rather with Leonardo da Vinci a hundred years before Galileo, when he single-handedly developed a new empirical approach, by involving the systematic observation of nature, reasoning, and mathematics, the main characteristics of

the "scientific method" (p. 7). His approach to scientific knowledge, however, was visual, the approach of a painter. Capra argued, Leonardo "did not pursue science and engineering to dominate nature," but rather he pursued it to try to "learn from her as much as possible" (p. 7). Centuries later humanity in the West is discovering once again how much she has to teach. "The separation of knowing and doing," that Peter spoke of, and the separation of knowing and sensing that Otto spoke of, that is "so widely accepted today can be addressed if we recognize that knowledge resides in our living in this world, not in controlling it" (Wildcat, 2009, p. 16). Indigenous peoples worldwide have science—they have Native Science (see Cajete, 2000, pp. 273-276) which is a process of thinking and relating that refuses to "decontextualize" (p. 307). This approach to sensing and shifting systems can help "form the basis for evolving the kind of cosmological reorientation that is so desperately needed" (p. 303). A fundamental difference between Native and Western science, says Peter, is that Western science prides itself in the 'scientist discovering' how reality is working versus deeper listening. Yet the nature of scientific discovery, as opposed to theory testing, has always been something of a mystery in the philosophy of science. As Otto says, Goethe was one Westerner who developed a whole way of deep observations and unpacking how scientific discovery could unfold—which has been a strong influence on our current emphasis on deeper listening. So, what Rick says and what Otto says connect directly.

"Listening to you this morning, Melanie, I've been Sundancing for 20 years, and have been to many Anishinaabe ceremonies, warrior dances, and ancestor dances. What you represent here to me is the soul, bringing the soul to systems work," said Auntie Diane. She continued, "What do the unborn generations need to be able to carry on? I think the first and foremost piece of systems thinking is how to create a collective mind again, to develop consciousness. That to me is the key piece." She concluded, "You can build whatever you want to build, you can build a new economy, you can build a new education system, we all have that capacity, I'm not worried about that. I'm worried about the minds of people to be able to do that." A holistic and ecological view of life has been called "the systems view of life" (Capra & Luisi, 2014, p. 70). What is significant in this definition is a recognition that the systems view of life is an ecological view "that is grounded, ultimately, in spiritual awareness" (p. 70). "That's how change is going to come, from our Earth Mother," said Kevin Deer in the opening story. And he said: "many people who are spiritually grounded are going to know what's happening, but the ones who never connected to the earth will not know what's going on."

Awareness-based systems change is a process of co-inquiry into the deeper structures of the social systems in order to see, sense, presence, and shift them. Bringing back *Ga'nigoi:yah* (the Good Mind) is a core concept of that co-inquiry, the Elders told me. The Elders and Peter each spoke about our collective disconnection from Mother Earth and how we must reconnect to her to truly understand the 'systemic nature' (Capra & Luisi, 2014) of life on this planet. Kevin said: "…when people are here on Turtle Island, suffice it to say they must acknowledge the ancestors, you are on this land, understand that you are guests,

that we are the hosts, come from a place of humility and with the utmost respect." He added: "from you acknowledging those ancestors and all of that spirit, to guide your thought processes, you try to come to understand everything is about healing." "Spirit is the life force of this work," explained Auntie Diane. She continued, "bringing back the Good Mind again. The Good Mind cannot be without the spirit being activated, that is the first piece of the healing that they [Westerners] are seeking, it's activating spiritual remembrance in their bones and DNA."

Melanie, Peter, and Otto first explored spiritual awareness and healing together in October of 2019 during the recording of the DoTS webinar, episode 6 (see Figure 4). The topic was *Indigenous Wisdom and the Civilizational Shift from Ego to Eco*. Kelvy Bird was scribing. The webinar began with an exchange of gifts. I offered Otto asemma (tobacco) and Otto gifted me with a precious amethyst. Peter joined halfway through for the discussion and reflections. It is significant to note that the live webinar sold out immediately at full capacity, with 500 people joining from 56 countries on seven continents. What was the appeal of this topic to a global audience? Perhaps it had something to do with what Peter shared when he walked into the meeting room at MIT, from which the webinar was being broadcast. During the webinar, I placed sacred items from a medicine *bundle* (see Bell, 2018, in McGregor, Restoule, & Johnston) on the table. Sacred bundles include items "that the spirits have given to a person to carry for the people" (Marsh et al., 2015, p. 7). These were spiritual helpers gifted to me to support my systems change work, a *mikinaak zhiishiigwan* (turtle rattle) and a *migizi miigwan* (eagle feather). These were placed on top of a *waabooyaan* (blanket) that featured the four sacred colors (Yellow, Red, Black, and White) of the four cardinal directions, East, South, West and North. When Peter entered the room, he experienced a visceral response to seeing the medicine bundle on the blanket, the hustle and bustle of MIT campus life faded away, and he said he felt like he "entered into a sacred lodge."

Figure 4: Photo DoTS webinar, episode 6, with Otto, Melanie, Peter and Kelvy

The generative scribing by Kelvy was captured in real time on a whiteboard (see Figure 5). During the webinar, I told a story about how I came to understand the Anishinaabe concept of *resilience* during my doctoral studies in Social and Ecological Sustainability. I was writing my comprehensive exam paper and reading about the Western concept of ecological resilience first articulated by C.S. (Buzz) Holling (1973), who published a classic paper in the *Annual Review of Ecology and Systematics* on the relationship between resilience and stability. He said resilience is "a measure of the persistence of systems and of their ability to absorb change and disturbance and still maintain the same relationships between populations or state variables" (p. 14). I reached out to two Anishinaabe language speakers and knowledge keepers and asked them, how would we define resilience in our worldview? My cousin Rene Meshake said: "It is *sibiksaagad*, sibi (river), biskaa (flexible), gad (it is). You might say that resilience is described as a river flowing flexibly through the land. *Anishinaabemowin* [our original language] is embedded in the land" (personal communication, 2018). My sister Eleanor Skead said: "*Mamasinijige* is the act of twists and turns and moves. *Mamasinijiwan* is the water flow, in twisting and turning. There always has to be context with Ojibwe words, "You need to introduce how the word is being used" (personal communication, 2018). Then Eleanor asked me if I was near a river. I was in fact writing my paper while staying outside of Waterloo, along the shores of the Nith River. Eleanor said, "she [the river] is teaching you." So, I made offerings to her, the Nith River, for teaching me about resilience. Kelvy captured this story in the DoTS scribing.

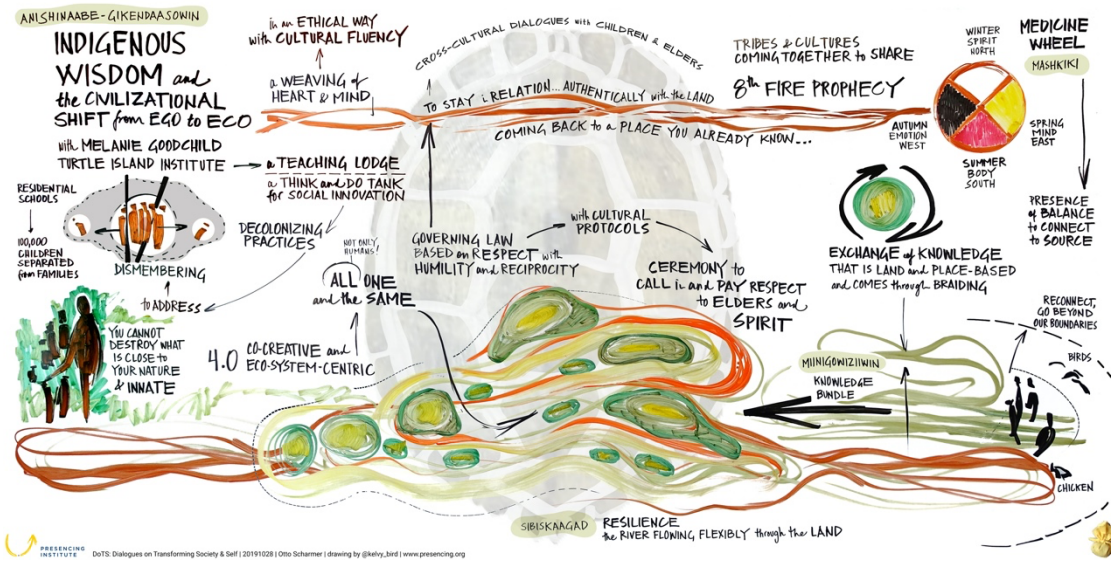

Figure 5. Generative Scribing by Kelvy Bird, of DoTS webinar, episode 6

Participants watching the live broadcast felt something similar to Peter, a presencing to the universe, across their computer screens. This was just before the global COVID-19 pandemic introduced us all to the regular use of webinars

as convening. The session evoked a lively chat in the Chat Box, that included some of the following shares:

- Being taught by a river, moves me to tears.
- How important is it for westerners to acknowledge the genocide to be able to bridge or unify these consciousnesses? It seems that we are asking the very people who we killed to save us from ourselves.
- This is such an important dialogue and is itself enacting the vital and necessary healing and transformations. Melanie and Otto, I am grateful for this enactment and creation.
- Is there a danger of coopting these concepts without full context?
- One of the important things I learned this year (actually from an indigenous elder in Nova Scotia) is that in the West we had a rich indigenous land-based tradition and we faced the first round of genocide coming from the church—this is what the witch burnings were—it was erasing our land-based intuitive, matriarchal culture and systems of power.
- It is a privilege having an opportunity to see the world from a perspective inaccessible to me so far.
- My principle for this is 'change moves at the speed of relationship'. In my Ontario community, I have been part of an indigenous allies working group process that spent several years building relationships and then invited elders to give community talks. In the first talk, the elder Doug Williams [from Curve Lake First Nation], offered a beautiful and simple way to start. 'We need to begin by listening to each other's stories'.
- The chat is as rich as the discussion, love this sharing.
- I am so grateful to be part of this discussion today.
- Wonderful to talk about 'healing' in a grounded, and practical way.

During the DoTS resonance exercise, where the participants were invited to allow themselves to truly *see* Kelvy's drawing, viewers shared *feelings* such as "I feel connected to the land," "I feel warm in my heart," "I feel a great need to change how I live," and "I feel the entanglement." They shared *sensing* such as "I sense it is about deep remembering," "I sense familiarity/resonance," "I sense a possibility that was always there, that we are finally ready to access," and "I sense braiding of cultures, traditions, wisdom and story." And they shared *seeing* such as "I see hope for our future," "I see the river," "I see confluence," and "I see how much I still have to learn." One viewer shared: "The most important

takeaway for me is the knowledge and the insight to change priorities in terms of which laws should govern our lives. I personally resonated strongly with the concept of prioritizing nature's laws on top of human laws. Maybe to find some humbleness here too." Peter shared something during the DoTS webinar that resonated with many viewers—that no matter how far we have been carried away from our connection to Mother Earth, something that is so innate, so true to our nature, cannot fully be destroyed. So, it is 'instinctual' to human beings—connecting to the land. "It's coming back to a place you know." Viewers also shared profound emotions such as "I feel the vastness of what needs to change," "I feel stressed by looking at the way we treat our planet earth and the path we still have to go to reach the wisdom of Melanie," "I feel the longing for connection," and "I sense grief and shame." Awareness-based systems change evokes feelings and emotions and it is to that topic we now turn—healing.

Conclusion: Coming to Know

Late Anishinaabe author Richard Wagamese said that if we leave our strong or painful feelings unattended, then "…those feelings can corrode your spirit" (2011, p. 186). Recall what Kevin shared, "Change is going to happen from people going inward within themselves and along with going back to having communion with their first mother, Mother Earth." Uncle Dan told me, "So what we've been talking about today in its essence is the *revitalization of human spiritual integrity*. This revitalization is really about rebuilding human beings from the inside out." He continued, "It's connecting that human being to themselves, to each other, to a sense of place, to a physical and spiritual world, and there's a system that is involved, a process, to be able to build that." Earlier, he also said that we must "restore that sacred feminine, predicated on kindness and compassion, caring, love—that's the real impetus of change. If systems theory and practice can conscience us to that way of understanding the world, then we'll see some really fundamental change but unless it does that, it will be the same old, same old."

Deep healing, says Tewa scholar Gregory Cajete (2010) from the Santa Clara Pueblo, occurs when the self "mutualizes" with body, mind, and spirit (p. 1130). In healing, we attain deep understanding, enlightenment, and wisdom; a high level of spiritual understanding. This is what he calls the seventh life stage of Indigenous education. There is a knowing "Center" in all human beings that reflects the knowing Center of the Earth and other living things. And Elders have always known that "coming into contact with one's inner Center is not always a pleasant or easily attainable experience" (Cajete, p. 1130). This led Indigenous peoples to develop "a variety of ceremonies, rituals, songs, dances, works of art, stories and traditions to assist individual access and utilize the potential healing and whole-making power in each person" (p. 1130). A transformational element of *coming to know* is "learning through self-reflection and sharing of experience in community" (p. 1131). This allows us, concludes Cajete, to understand our learning in the context of the great whole. Cross-

culture dialogues help us to see that there are as many ways of seeing, hearing, feeling, and understanding as there are members in a group. We come to understand that "we can learn from another's perspective and experience," and we also "become aware of our own and other's bias and lack of understanding through the process of the group" (p. 1131). We become aware of our mental models, as Peter has described it, and of our blind spots, as Otto has described it.

In writing about prevailing mental models, Peter once said the more profound the change in strategy, the deeper must be the change in thinking (Senge and Sterman, 1992, p. 137). This article is an invitation to sit in circle with us, in the sacred space of non-interference *in between epistemologies*. It requires a change in thinking and knowing. That is what the two-row visual code invited us to do, and it is what the DoTS webinar invited Melanie, Otto, Peter, Kelvy, and the viewers to do. The space in between is a healing space and a space of peace, respect and friendship, inspired by the spirit of the two-row wampum belt. One of the DoTS viewers shared: "I feel at home here in this space. To meet other people who seek this beautiful space to find connection as individuals and community."

Healing self and systems is ultimately at the heart of the work of Turtle Island Institute[5] (TII), the Presencing Institute, and this new journal. I founded TII and our new virtual teaching lodge called *Mikinaak Wigyaam* (Turtle Lodge) as a safe place for innovators and changemakers to sit with Elders and each other, to engage in deep inner work, in order to lead/support our outer work. As Auntie Diane said earlier, "You've gotta do your work." Inside the teaching lodge everyone is a student, and everyone is a teacher. We practice *gichi gakinoo'imaatiwin*[6] (the act of great or deep teaching) (Eleanor Skead, personal communication, 2020). As Opaskwayak Cree scholar Shawn Wilson (2008) points out, for Indigenous peoples everything begins with *relationships*. And Indigenous *community* is based on relational thinking (Cajete, 2015). Inside the teaching lodge, we engage in a process I've termed *relational systems thinking* where awareness-based systems change centers *mutual benefit*, a foundational principle that Uncle Dan shared with me, between all the humans, the non-humans, the unborn generations and our Earth Mother. Kevin offered the following words at the conclusion of our tea together in Six Nations: "We ask all of the powers of the earth, the upper world, lower world, the ancestors, the Great Spirit, with all of their power, strength and wisdom to help us." On behalf of all of us, I say *Miigwetch* (thank you in Ojibway) and *Nya:Weh* (thank you in Mohawk) for listening.

[5] See www.turtleislandinstitute.ca

[6] See video Gichi Gakinoo'imaatiwin https://vimeo.com/427149336/27c6e0d67e

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In the Making

Action Research from a Social Field Perspective

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Our Intention

We write this piece to share our discovery process as action researchers in an emergent change initiative. In particular, we want to explore and share the realization that we needed to expand our research framework mid-process in order to fully serve the transformational intention of the initiative and the research itself. The framework we need is one that both serves awareness-based action in emergent processes and generates widely applicable knowledge; that integrates a variety of perspectives on social phenomena (first-, second-, and third-person); and that aims to bring systematic inquiry both to the observable

phenomena and the deeper underlying dimensions. The approach requires us to make visible our assumptions and to integrate and validate different epistemologies, including relational, intuitive, and aesthetic knowing. As such, the approach to research we suggest here can be thought of as an epistemological framework itself.

Our position surfaces from our recent experience as a team of embedded action researchers in an emergent change initiative called GAIA—Global Activation of Intention and Action—hosted by the Presencing Institute between March and June 2020. GAIA emerged during and in response to the COVID 19 global pandemic and associated lockdown. It aimed to bring together virtually a global community to bear witness to the current moment as a way to mobilize social change action (https://www.presencing.org/news/news/gaia-essentials). The GAIA initiative was based on Theory U (Scharmer, 2016, 2018a; Scharmer & Kaufer, 2013), a framework and methodology explicit in its intention to build capacity for leading transformative social change through awareness-based tools and approaches. GAIA, then, can be considered an awareness-based systems change initiative.

The work described here takes place under the broad umbrella of action research and reflects its key properties. Describing the nature of action research, Bradbury (2015) states,

> Action research is emergent and developmental. It concerns practical issues and human flourishing. Its modality is primarily participative and democratic, working with participants and toward knowledge in action. (p. 1)

All of these characteristics describe and shape our work. Further, we assumed a social field perspective. We consider the social field to be, "the entirety of the social system with an emphasis on the *source conditions* that give rise to patterns of thinking, conversing, and organizing, which in turn produce practical results" (Scharmer, Pomeroy & Kaufer, 2021, p.5). The social field perspective rests on a number of assumptions. First, a social field perspective considers both the visible aspects of a social system and the less visible aspects, i.e., the inner or deeper dimensions of the system. The implication of this stance is that a social field cannot be known without the integration of first-, second-, and third-person perspectives of the system. First-person perspective relates to the individual experience in and of the social field, second-person to the intersubjective, shared experience, and third-person to what can be known about the social field through external observation. The second assumption is that there are layers of phenomena shaping the field. Observable social phenomena are shaped by interpersonal and organizational dynamics, patterns of organizing, and paradigms of thought. Underneath these, and giving rise to them, is individual and collective consciousness, also referred to as Source (Scharmer, 2016). The third assumption is that the social field functions as a living entity, continuously co-creating its reality-in-context. In other words, social fields are emergent (Goldstein, 1999). These assumptions have implications for a social field research

methodology, and shape the research intention, the nature of data sought, the methods used to collect that data, and the processes for analysis and sense-making.

One key aspect of a social field approach to action research is the embedded nature of the research and the researchers. All members of the research team hold a variety of roles in relation to the initiative, representing a particular positionality related to the Presencing Institute. The roles range from core team member to language track leader to members of affiliated communities, such as the Social Presencing Theater and Social Field Research communities. In addition, we all took part in the initiative as participants. Deep familiarity with an experience has been seen as a benefit of embedded research elsewhere, reducing the likelihood that the researchers misinterpret local phenomena and increasing the likelihood of forming strong relationships that support the research process (Rowley, 2014). However, that familiarity and closeness can be viewed as a limitation as internal researchers have a vested interest in the organization and existing relationships within it, risking the possibility for co-dependency or even coercion (Wong, 2009). As social field researchers seeking to understand the interior experience as well as the observable elements of the initiative, it was essential for us to move into the experience as participants in order to bring in our own first-person experience as data. We aim to counter the limitations cited above by being transparent and self-reflective about our process, 'bending the beam' of our attention back on ourselves and the research process here.

We believe that we will increasingly find ourselves in globally disrupted situations—such as the pandemic context that gave rise to GAIA—that do not afford lengthy periods of planning time before action is needed. Research needs to keep pace with our current disrupted and unpredictable global context in order to be useful to the individuals and settings where it takes place—a key principle of action research (Bradbury, 2015; Coughlan & Abraham, 2018; Stringer 2014). Further, research needs to honour multiple forms of knowing if it is genuine in its effort to accurately represent the 'whole' of experience as a basis for social change. Temper, McGarry & Weber (2019) observe, "The role of science and knowledge production is at a crossroads, as societal transformation calls for challenging dominant forms of knowledge production that have contributed to marginalizing other ways of knowing" (para 1). From a social field perspective, a new epistemological framework is needed in order to address the root causes of current disruption, namely, the dynamics and source conditions from which social systems originate and evolve.

The GAIA Context

The Theory U process, on which GAIA is based, is built upon more than twenty years of action research at MIT. The intention of this work has been to build leadership capacity amongst individuals, teams, organizations, and large systems in order to address the root causes of social, environmental, and

spiritual challenges (https://www.presencing.org/aboutus/theory-u). Theory U emphasizes self- and ecosystem awareness, attention to quality of listening and attending, consciousness, and action for societal transformation. In previous research, outcomes described by participants in a Theory U-based program included increased sense of self and clarity of purpose, increased capacity for perspective taking and deep listening, more inclusive decision-making, and greater willingness to step into new action, referred to as action confidence (Pomeroy & Oliver, 2021). While GAIA itself was not a developmental program, it drew on practices established in programmatic work to operate as a 'holding space' for the moment and the community, with an explicit intention to support transformative learning and action.

The central feature of the GAIA process was a series of 90-minute bi-weekly online gatherings hosted on Zoom, supported by optional self-organizing small-group processes. Sessions included conceptual framing, guest speakers, small-group dialogue, and contemplative practices, including embodiment exercises. Over the fourteen-week duration of GAIA, thirteen thousand people from 77 countries participated. While the bi-weekly structure was determined at the outset, the specific form of the sessions took shape as the initiative progressed, so the process was iterative, evolving, and emergent.

The research was initiated by the Presencing Institute to support the wider intention of GAIA. This means the initiative and research rest on the same assumptions that underlie the initiative and that have been stated by Scharmer (2018b) as follows:

> You cannot understand a system unless you change it (Kurt Lewin).
>
> You cannot change a system unless you transform consciousness.
>
> You cannot transform consciousness unless the system senses and sees itself. (para 16)

The primary contribution of the research was in relation to the third of the points above. Our role as a research team was to provide rapid feedback to the global community in order 'to help the system see and sense itself'. We designed data collection methods to provide a structure for reflection that supported participants' capacity to understand (i.e., see and sense) their individual experience, while data sharing aimed to mirror back the collective experience of which they were a part.

The Research Process: Social Field Research in the Making

The research process was iterative. It began with a short, open-answer survey and evolved to include online focus groups as a space for deeper reflection and dialogue. Three online surveys were used, one at the beginning, middle, and end of the initiative. Four focus groups were formed, two meeting monthly and two

bi-monthly. In addition to surveys and focus groups—more traditional methods of data collection—we also explored emergent methodologies that aimed to access other forms of knowing, such as intuitive, sensory, and aesthetic forms. Doing so is in keeping with a social field approach and its interest in the deeper layers of collective experience. These layers underlie observable behaviour but cannot, from an external perspective, be observed and so we need to engage other forms of perceiving and knowing to access them.

Second-Person Research

There are two aspects of the inquiry into these deeper layers that shape the epistemological framework we are suggesting here. First, the inquiry needs to happen from inside the phenomenon. By definition, it simply can't be observed from the outside. That means we have to draw on first- and second-person experiences. First-person perspective is important, as it yields personal experience with and within the social field as relevant data. In addition, as researchers we can cultivate our capacity to pay attention to what is happening in the field as a way of using first-person perception as a gateway to understanding collective experience. It is this sense of the first-person perspective that we drew on for our collective, second-person inquiry. Reflecting Torbert's (2004) conceptualization, we consider second-person research to be that which happens in holding spaces where groups engage intentionally for the purpose of sense-making. Second-person knowing has probably been best described through Bohm's concept of dialogue, where collective engagement, "make[s] possible a flow of meaning for the whole group, out of which may emerge some new understanding" (Bohm, 1996, p. 6). The potential contribution of second-person inquiry to generate knowledge has been seriously under-attended in research. Few methodologies for it have been well-established. We aimed to access second-person knowing in both the focus groups, which were designed to be 'holding spaces' for dialogue, and by consciously integrating second-person inquiry into our sense-making process as a research team.

Multiple Ways of Knowing

The second key aspect of making visible in collective experience that which is not, is that it requires experimentation with methods for accessing sensorial, intuitive, and aesthetic knowing. De Sousa Santos (2018) states, "[k]nowledge is not possible without experience, and experience is inconceivable without the senses and feelings they arouse in us" (p. 165). While methods for inquiring into observable, measurable phenomena abound, those that aim to access the less cognitive-focused aspects of experience are disparate and often nascent. Our own work in this area can be thought of as an experiment in developing a methodology for accessing and inquiring into the less visible aspects of collective phenomena.

A Methodological Prototype

To this end, we designed a reflective journaling and dialogue process. First, we shared data from focus groups, personal experience, and analysis of survey findings. Next, we engaged with a sequence of questions designed to access our feeling-knowing ('what is most surprising in what we are hearing and experiencing?', 'what most touched me?', 'what is the emotional tone of the experience, for others and for myself?') and our intuitive knowing ('if the experience/emerging community was a living being, what would it look and feel like?', 'what is the generative source that allows this being to thrive?', 'what limiting factors prevent it from developing further?'). We responded to the journaling questions individually, then shared reflections in dialogue, making meaning of our reflection-findings together. This process was developed over the course of three iterations, eventually integrating a component of embodied practice to sense into the collective experience by representing it with body shapes.

The nature of the data these experiences surfaced tended to relate to the social field as a whole. For example, we first engaged in this process using data from the second survey as a basis for our sensing. After sharing our analysis of the survey responses, we shifted to the journaling process described above. What surfaced from the exercise and dialogue that followed was the story of a social field maturing. The word 'maturing' emerged in relation to the collective and resonated with us as a description of what was happening on a field level. This maturing process was reflected in comments that seemed more complex and differentiated than those in the earlier survey, as well as more self-reflective. This was true across several broad themes in the data. For example, in relation to the theme 'community' initial comments were often more uni-dimensional, for example expressing appreciation for finding others who were like-minded:

> *[I experienced] The power of being part of a community—around the world—who are interested in using this disruption to reimagine the world.*

While the general sentiment and tone remained the same, many comments in the second survey seemed to reflect a more nuanced view, for example differentiating the personal experience from the collective one and integrating the two:

> *I want to be part of creating a new social order, based on what I (and many others) have seen and heard. My contribution may be small, and I want to make it in solidarity with others.*
>
> *Being part of GAIA Journey gives me grounding and a sense of being part of something bigger in terms of purpose (something that gives life at the same time to my own purpose in life).*

A similar process of maturing was perceived in relation to comments around the theme 'holding contradiction'. An early comment reflecting this was:

[I feel] Confused but hopeful.

...while a later comment unpacks the sense of contradiction with significant nuance:

> *I feel shaken to my roots, and that sometimes scares me, and I feel insecure, unstable. But I am also determined to be a bit more sincere in my whole being present. And at the same time I feel calm and peaceful, strong and easy going to see what is happening.*

While we have used comments (observable data) here to illustrate our point, it is important to note that the 'finding' that the social field had matured surfaced from the journaling exercise and dialogue. It is our feeling that the sensing processes surfaced aspects of the collective experience that resonated as true reflections of it, but that were not directly stated in any of the data. Further, this change in the field may not have become apparent without the process. One of the most challenging aspects of the research has been to integrate and share the data from the sensing process. While the data 'rings true', few models exist to integrate collectively sourced, intuitive, sensorial data into research.

Research in Action: Closing the Feedback Loop

The point of the research was to help the community see and sense itself as part of the transformative learning process, i.e., to serve action in an emergent process. This happened by feeding data back to the participant community during live online gatherings. Here we see the integration of first-, second-, and third-person inquiry as well as the iterative nature of action research. After collecting survey data (third-person inquiry) and analyzing that data both traditionally and through our sensing process (second-person inquiry), we selected aspects of the data to share in focus groups to explore their resonance (first- and second-person inquiry). Working with the GAIA media team, we created a compilation of video clips from the recorded focus group calls to reflect back to the community some of the key themes emerging from these conversations. The video clip was then shown in plenary during the online gathering in an effort to mirror back to the community their collective experience.

Figure 1: Two community members who contributed to focus group comments shared in GAIA plenary. Full compilation video: https://vimeo.com/425765149

The video clip then surfaced feedback from participants in the online session as they expressed the resonance they felt with different themes shared in the video in the 'chat' function of the zoom call. Some of the comments in response to the video above were:

> *the idea "we are not alone" resonates so deeply with me*
>
> *we are not alone with laughter made me burst into tears. It's not me to feel this way.*
>
> *Thank you for the beautiful sharing of your hearts which touched mine and opened it further!! We are not alone…thank heavens…and I do.*
>
> *I really need to hear that there is still a core of common humanity in the world.*
>
> *seeing, sensing, feeling yet a sense of inadequate strategy to create change*

We realize that comments in the call chat discussion likely don't capture the full range of responses to the video as people may be reticent to share more critical comments in a public chat. However, the comments people do share give an indication of which themes surfacing in the focus groups have the most resonance for the larger community. The resonance then added a further layer of data, shaping our inquiry, for example, motivating us to ask a question in a subsequent survey to explore the role of interconnectedness ('we are not alone') in the overall experience of the initiative.

Bradbury (2015) states, "action researchers draw on and contribute to an ever-increasing repertoire of experiential practices at personal, interpersonal, and/or collective levels, allowing us to address complex problems while also giving attention to coordinating needed action" (p. 1). Our research began with traditional methodologies and, over time, led us to experiment with emerging methodologies as well, all in an effort to support action, i.e., contributing to the transformative change process by mirroring the system-in-its-process back to itself.

Questions for an Emerging Framework

Our need for an integrated research framework arose in the midst of our experience as embedded action researchers in a highly emergent context. Our aim throughout was for our inquiry to serve action in this specific context, while simultaneously generating more widely applicable knowledge. Building a research framework was not our original focus. Rather, the need surfaced as we tried to accurately reflect the collective experience back to the community as the initiative unfolded. We drew considerably on traditional data collection and analysis methods. These more cognitive-focused forms of inquiry and knowing made a significant contribution to our understanding of the collective experience. However, they were not enough. As Anderson and Braud (2011) observe, "so

often our research methods fall flat before the fullness and extraordinary experience of being human day-to-day" (p. 3). So, while traditional methodologies helped us to 'see' the collective experience, they were of less service in our efforts to 'sense' it. To do so required us to access the less visible, felt aspects of the experience and to do *that* required new methods that drew on our sensory, intuitive, and aesthetic knowing. Further, in exploring collective experience, we needed to privilege collective inquiry and so designed methods based on a second-person perspective.

Key questions surfaced that, pursued, will help to shape the epistemological framework that has begun to emerge for us through this work.

1. **How can we further develop second-person research?** What is the place of collective sense-making in research? The second-person space is a particularly interesting aspect of our research, as it is little addressed elsewhere. Operating from a social field perspective, we pay special attention to the *quality of relating* in the holding space, consciously working to cultivate safety, openness and dialogue, and incorporating contemplative practices to do so. What are the implications of this approach for research? What kind of conceptual and practical frameworks are needed to further develop second-person research? What is the nature of the data collected in these holding spaces, and what does it serve?
2. **How can we further integrate and render valid intuitive, aesthetic, and embodied data?** How can we further evolve emerging methodologies related to sensorial knowing and integrate these with more established approaches to research? Holistic knowledge systems have long been a part of Indigenous scholarship (Cajete, 2005; Goodchild, 2021; Kimmerer, 2013; Kovach, 2007) and aesthetic and embodied forms of knowing are increasingly acknowledged elsewhere in academia (Ignatow, 2007; Shrivastava, Schumacher, Wasieliski & Tasic, 2017; Sutherland & Jelinek, 2015). About one month into the initiative, the research team added into the data analysis the process described above (reflective journaling and dialogue process) in order to access more intuitive, emotional-relational, and embodied ways of knowing. The process represents our effort to bring systematic inquiry to the deeper, less cognitive-centric levels of knowing. When we shared the results of our collective sensing, it seemed to have much resonance with participants, as gauged by comments in the zoom chat and personal communication

afterward. Still, it remains difficult to 'fit' that data into the research findings or even to write about it. What frameworks help ease the integration of different forms of knowing into our accounts of phenomena? What methods would render the data 'trustworthy' and thus easier to include?

3. **How do we generate data that serves rigour and relevance in emergent processes?** Levin (2012) argues that, "action research cannot contribute to the social science debate unless its findings are considered trustworthy and relevant" (p. 134). We believe there is tremendous potential to generate valuable, useful, and *generalizable* knowledge about social phenomena through the research effort to understand and support it as it unfolds. Our aim was to collect and process high-quality data AND to share our findings rapidly so that it could be useful to the initiative and the community. In action research, rigour, "is based on checks to ensure that the outcomes of research are trustworthy" (Stringer, 2014, p. 92). Some of our practices reflected the rigour more characteristic of traditional research approaches. For example, our process of "checks" in the analysis of survey data was to have at least two team members review responses to a survey question, organize the data into themes and then come together to synthesize our findings and make sense of the data as a whole. Here the integration of second-person inquiry—sense-making—serves a dual purpose. It adds rigour to the process through its "check" on individual analyses, but it also has the potential to generate new understanding by deepening the meaning-making through collective inquiry, questioning, and dialogue around the findings.

   The relevance of the research lay largely with its capacity to serve an emergent process *as it emerged*. One challenge here was the time delay between collecting data and feeding the findings back to the community. Even though the process of data collection, analysis, and feedback felt like a "sprint" for the team, there was a delay for two to four weeks between data collection and feedback to the community, running the risk that the feedback could be 'out of step' with the collective experience. In one strand of the initiative—a Spanish-language version of the process—facilitators experimented with interactive polling software (mentimeter) to share immediate raw data from participants about their experience the moment it was generated. The benefit of this approach is that it removes the issue of the time-lapse and involves

> the community in sense-making, but it does require the community itself to process and make sense of a large amount of data within a limited timeframe.
>
> We are left with several questions here. What data collection and feedback processes best serve the intention to help a system see and sense itself? Put more generally, what are the methods that best serve action in an emergent process? How can these best be developed so that they simultaneously generate knowledge applicable beyond the specific initiative? How can we evolve methods that reconcile the need for rapid feedback with the need for quality data—both cognitive-relational and sensory-intuitive?

Conclusion

Our intention with this piece is to highlight, through our experience as embedded action researchers in an emergent change process, the need for an integrated research framework. The framework we found we needed is one that both serves awareness-based action and generates widely applicable knowledge; that integrates first-, second-, and third-person perspectives on social phenomena; and that aims to bring systematic inquiry both to observable phenomena and to the less visible dimensions that underlie it. From a social field perspective, all activity undertaken under the banner of 'research' is done in service of social transformation—making the deeper structures of systems visible in order to transform them.

The methods aligned with this research framework evolve in the process of using them. Early precedence for this kind of approach to methodological development can be found in the work of Kurt Lewin, considered by many the founder of social psychology. Using the metaphor of resource extraction and highway construction, reflecting the era in which he was writing, he describes the process of developing a new domain of study and understanding:

> … small paths are pushed out through the unknown; with simple and primitive instruments, measurements are made; much is left to assumption and to lucky intuition. Slowly certain paths are widened; guess and luck are gradually replaced by experience and systematic exploration with more elaborate instruments… (Lewin, 1951, p.3)

The development of appropriate research methodologies is itself an iterative, experiential learning endeavour. Methodology must develop in tandem with the work in order to develop an understanding that is a. accurate and whole, and b. useful in practical, actionable terms. Our current context of disruption makes the need for methodologies that both serve emergent phenomena and generate knowledge from it all the more pressing. In this piece, we hope to have surfaced questions that stimulate consideration, critique, debate and, more than anything

else, future action that evolves the field of social field research to support awareness-based systems change.

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Discussant Commentary

Sensing the Social Field through Action Research: What's Important, What's Valid

A Commentary on Pomeroy et al., "Exploring Action Research from a Social Field Perspective"

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University of Texas

Birthing a Global Field

What I love about action research is its whole-person, in-the-moment, emergent nature. As action researchers, we are *in service* of the emergence of a greater whole, a gradual transformation process that births something new. As action researchers we know in our hearts when we have made a difference. But we do not claim agency. We serve as midwife to the social field's own emergence, helping it to know itself. It is this sense of wonder at midwifing the birth of something new that stands out to me in the article by the Presencing Institute's action research team (hereafter called 'the Team') as they describe their work with the remarkable process called GAIA.

In March of 2020, as the pandemic spread across the globe bringing lockdowns and social isolation, the Presencing Institute quickly designed and launched a 14-week global community-building event called GAIA—Global

Activation of Intention and Action. Designed as a self-organizing platform, the event brought together thousands of change agents from around the globe. Through simultaneous Zoom rooms across multiple continents and multiple languages, the GAIA participants created over those 14 weeks a resonant social field—one that not only offered social connection but also deepened their awareness, individually and collectively, of what was calling them forward, what was theirs to do in this time of global crisis.

The Pomeroy et al. article describes the experience of the Presencing Institute's action research team as it engaged with the GAIA process. Team members embedded themselves in the process as co-participants to get a first-person felt-sense of the experience. The Team also monitored the pulse of the social field with periodic surveys and focus groups in order to mirror back to the GAIA community its own process of evolution through the 14-week process.

Sensing the Social Field

I consider the article's primary contribution to the action research literature to be the Team's evocative description of a particular moment in their action research with the GAIA process. It is the moment when the Team moves from sense-making about the social field of the GAIA process to collectively sensing with the living, evolving social field the GAIA participants were enacting. This movement from sense-making to sensing deepens the way of knowing, from observing a system to becoming the system in a collective process of transformation. The social field opened up to the Team as they moved from sense-making to a relational awareness of a living system in an emergent process.

What sparked this transformative moment for the Team? The breakthrough moment came when the team members turned from analyzing survey results to journaling their inner experience, accessing their feelings and intuition about the GAIA process they were monitoring. Then they shared their feelings and intuition with each other to surface their collective knowing—a kind of embodied knowing that arises from a deep source. They envisioned the social field as a whole, as a living and evolving being. They began to sense the GAIA field opening up to them. A new relational awareness from within the living system emerged—the 'I', the 'we', the 'they' becoming one. From this place, the team members could access their deepest collective wisdom—their embodied, intuitive awareness of the social field as a living being. The deep dive of collective sensing opened their hearts. And they turned to nurture the living field's own evolution.

This is action research at its finest, articulated by the Team with evocative descriptions of the movement from sense-making about the social field to *sensing* the social field from *within* it. Underneath their words, you can feel the breakthrough and buoyance that the Team experienced, embodying the subtlety and depth of what Otto Scharmer calls the Field 3 experience (2015). This is what 'sensing the social field' means—how different from merely observing it!

Our call as action researchers in academia is to make this way of knowing and doing visible, recognized, and appreciated for the depth and integrity it offers.

The Morning After: A Post-Positivist Dilemma

The post-partum blues in action research typically occur when you return to your academic home and try to tell your colleagues what you accomplished! Or try to write that article for a leading journal in your field. The question becomes this: how to convey the significance and validity of your work. Pomeroy et al. ask that very question.

I have faced that dilemma numerous times. I do action research with place-based communities—especially at-risk or vulnerable communities in the Global South (Wilson 2019). For action researchers, how we know if we were successful—or what worked and didn't—is easy: We feel it! We know by how the social field—the community that we have entered and become a part of—responds to us and how it feels about itself and its own sense of agency. What didn't work along the way is not a failure, but a learning opportunity. (See the practice stories in Wilson, 2019, especially Chapters 2 and 7).

To convey the significance of my action research, I draw upon inspiring post-positivist methodologies. Awareness of post-positivist methodologies has blossomed over the last four decades, bringing ontological and epistemological depth to action research. These methodologies embrace relational, experiential, and embodied ways of knowing: subjective and intersubjective, intuitive and heart-based. They privilege wholes rather than parts and explore consciousness, both individual and collective. These ways of knowing do not dismiss the role of empirical data. Rather, they open a world of insight that is sometimes referred to as feminine ways of knowing, being, and doing. Action research is a means for holistically comprehending the subjective and intersubjective nature of a group process.

Relational action research, much of which comes out of the Social Innovation literature, is one of those ontological contributions (see Bartels 2020, Greenwood & Levin 2007 and Frantzeskaki & Rok 2018). The 'radical interdependence' work of Arturo Escobar (2017) on transition design, particularly noteworthy for its ontological roots in the ground-breaking insights of Maturana and Varela, is another. Otto Scharmer's work (2007), which also draws inspiration from Maturana and Varela, has provided many of us with a phenomenological framing that acknowledges a spiritual dimension of awareness in our practice (see Chapters 8 and 10 in Wilson 2019).

Assessing Validity in Post-Positivist Research

It is clear that the Team knew in their hearts how effective and impactful their action research with GAIA had been. But the right validity indicators can be useful for assessing results more finely and communicating them to others. Herr and Anderson (2005) offer four validity criteria which I consider to be supportive

of the post-positivist relational methodology of action research. I offer my own definition of a fifth criterion.

1. Democratic validity refers to the extent to which action research is done in collaboration with all parties who have a stake in the problem or process under investigation.

The key indicator I use for democratic validity in action research is one question: Who owns the results? Certainly, the participants in the GAIA process owned the transformative results of their shared experiences over the 14 weeks. Such individual and collective 'ownership' was the Presencing Institute's intention and the outcome. If we look at the assessment process and feedback loops the action research team created, it is clear that the entire Team felt ownership of that process and its results.

The GAIA participants themselves, however, did not take ownership of the assessment process. They provided feedback to the action research team. To fully meet the criterion of democratic validity, the participants would need to co-create and co-conduct the assessment of their process *with* the action researchers. The results of the assessment would be 'owned' by all, not by the research team. As Bartels states (p. 2878), action research is "a relational process in which action researchers and stakeholders [participants] collaboratively craft interpretations, adapt research methods and stimulate change". While this distinction may not be relevant in the GAIA case, it is highly relevant to much academic-led action research in which place-based community action research runs the risk of becoming extractive rather than collaborative.

2. Outcome validity refers to an iterative process, a spiral, in which participants reframe the problem in an increasingly nuanced way, evidencing growing awareness of its deeper complexity.

The Team fully enacted that process among themselves, which they describe as culminating in the awareness of the social field's maturation process and a heart-opening toward what was theirs to do.

3.Catalytic validity is the degree to which the action research process changes the participants' views of themselves, their sense of purpose, of what is possible, and of what they can accomplish.

The Team witnessed a growing sense of purpose and intention among the GAIA participants in their two on-going focus groups. The Team's own sensing process was transformative as well: The team members view of themselves as a team, in their ways of knowing, and in their sense of purpose evolved as they realized they were there to hold and foster the social field's maturation.

4. Process validity assesses not only whether the process used produced desirable results, but also whether it created ongoing learning and action by the participants.

Meeting this criterion would require the research team to follow up periodically with the participants. It is the hope that many of the GAIA hubs will stay together as coaching circles and support groups to encourage each other

forward in their intentions to create the landing pads for awareness-based systemic change across the globe.

5. Dialogic validity is defined by Herr and Anderson as feedback from other researchers who examine your action research process and results for alternative interpretations. I prefer to define dialogic validity as the quality of mutual understanding developed among and between action researchers and participants through deep listening. Through such dialogue we begin to notice and suspend (or adapt, says Bartels, 2878)) our pre-held assumptions, beliefs and knowledge. Deep dialogue becomes empathic and generative (Scharmer, 2007). It opens the door to participatory consciousness (Wilson, 231-2).

As the GAIA participants moved from seeing to sensing their own social field, their conversations grew deeper as well—more empathic, relational, and generative. The action research team experienced the same shift as they put aside the survey results and sank deeper into their embodied and intuitive knowing. The Team described their own dialogue as 'Bohmian', which involves changing the way the thought process itself occurs, individually and collectively, becoming aware of and suspending one's own assumptions, and creating shared meaning (Bohm, 2013).

Summing Up

Action research is "co-generative learning" with "ongoing and purposive redesign" (Greenwood and Levin, 2007, p. 133-4). It is a "deliberate yet emergent strategy for developing joint readings of unfolding events and crystalizing where to intervene and how to give shape to change" (Bartels, 2020, p. 2876). The gateway to transformational action research is co-sensing the social field through "total immersion in the particulars of the field—in the living presence of the phenomenon,…becoming one with the phenomenon you study" (Scharmer 2007, p. 147).

The Presencing Institute action research team's story of co-sensing and nurturing the social field of the GAIA process is a vibrant example of what action researchers are called to do: to be in service to the emergence of a greater whole, a transformation process that births something new.

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In Dialogue

Exploring the Origins of Practice: In Dialogue with Founding Faculty of the Presencing Institute

Julie Arts, Angela Baldini, Marian Goodman, Arawana Hayashi, Beth Jandernoa, and Otto Scharmer
Presencing Institute

The Presencing Institute was founded in 2006 by MIT Sloan School of Management Senior Lecturer Otto Scharmer and colleagues to create an action research platform at the intersection of science, spirituality, and profound social change. Over the past two decades, the institute has developed Theory U as a change framework for individuals, teams, organizations, and large systems, building leadership capacity to cultivate systems change from an awareness-based perspective and using awareness-based approaches. The methodologies developed and evolved by the Presencing Institute have been used by thousands of organizations and communities around the world working to address our most pressing global challenges: climate change, food systems, inequality and

exclusion, finance, healthcare, and education. The introduction of u.lab[1]—an online-to-offline change process made widely and freely available on the Harvard/MIT learning platform, edX—brought the work to scale, creating a global ecosystem of changemakers bringing awareness-based processes and practice to systemic change work. Over the past decade, the institute has reached over 200,000 registered participants through its virtual and in-person programs.

In September 2020, Julie Arts and Angela Baldini, core team members of the Presencing Institute, brought together four of the founding faculty for a conversation on the origins of some of the institute's key tools and practices. They sought to articulate the roots of the organization's work by inquiring into the history of its practices with the people who brought them into being through their experimentation. The group shared how these tools came into being and evolved, and also 'what the work asked of them'—touching into the inner experience of holding these practices. What unfolded was a dialogue on the deeper dimensions of practice underlying not only these tools, but the field of awareness-based systems change as a whole. In the end, there was a sense that the conversation went to the heart of what the work is really about—and that it is a conversation worth sharing.

The first issue of the Journal was in process at the time, and a proposal was put to the editorial team to consider including this piece. Conversation around the proposal concluded with a decision not just to include this piece, but to create an *In Dialogue* section as a feature of every issue, leading with this piece in the inaugural issue. The intention of this feature is to surface and share the knowledge that lives in practice and is best articulated in the relational space we create through dialogue.

Participating in the Dialogue:

Julie Arts
Senior Faculty member of the Presencing Institute and co-founder of the U.Academy

Angela Baldini
Manager of Social Presencing Theater, Presencing Foundation, and Advanced programs in Europe and co-founder of the U.Academy

Marian Goodman
Senior Faculty member of the Presencing Institute and facilitator of a variety of innovation projects and capacity building programs

Arawana Hayashi
Choreographer, performer, and educator, co-founder of the Presencing Institute and founder of Social Presencing Theater

[1] https://www.edx.org/course/ulab-leading-from-the-emerging-future

Beth Jandernoa
Co-founder of the Presencing Institute and a founding Core Faculty

Otto Scharmer
Senior Lecturer at MIT's Sloan School of Management and co-founder of the Presencing Institute

Origins

Julie: We know that tools can be used at multiple levels. They can simply be tools to help achieve a task, or they can be part of a process of transformation, which is obviously our intention. If we look at our tools, such as 3D Mapping, 4D Mapping, and Sensing Journeys, we can ask ourselves: where do they come from and why are they so powerful?

> *3D Mapping* involves creating a three-dimensional model that 'maps out' a current situation using small items such as figurines, feathers, pieces of wool to symbolise elements and dynamics.
>
> *4D Mapping* is a structured embodiment method where group members embody roles within a system and, through the relational positioning, movement, and spoken expression within these roles, gain new insights about the system by making more visible its current reality.
>
> *Sensing Practices* aim to cultivate a capacity to perceive oneself and the system from a new, meaningful perspective. Sensing Journeys take people out of their daily routine or context in order to experience their organization, challenge, or system through the lenses of different stakeholders while Stakeholder Interviews are structured interviews that aim to help the interviewer to see his/her role through their stakeholders' eyes.

Beth: 3D Mapping arose out of a real experience in a circle of women who were working on ourselves and helping each other see, grow, and traverse significant transitions in our lives. It wasn't a preconceived theory or model that was constructed and "lowered" onto a situation. It came out of our deep, rich, personal experience and I think that's true of how the other tools we use in PI were created too. 3D Mapping was invented in the moment because one of the women in our circle was wrestling with a real-time challenge in her life. It was an experiment intended to help her display her situation in order to become more aware of the internal and external factors at play that were invisible to her. The process was rough to begin with because we were discovering what worked as we went along. We saw that it produced unexpected and helpful results for the women involved and for those of us who were holding and observing. Once we realized the impact it had over time, and the potential for wider application, we continued to experiment, develop, and refine it.

Otto: So, Beth, the origin story of 3D Mapping that you shared with us, it came out of self-application, right? You didn't create it for clients. The beauty of this whole story of how you started was not "let's do something for *them*", it was, "we need to first heal *ourselves*". That, and the journey that followed, gave birth to the tool. I think that's very important. The self is always part of the laboratory of the tool's origination.

Beth: Yes, that's exactly right.

Marian: One thing I notice is the presence of the arc of the U[2] in all the tools. The fact that it's present, but the tool didn't originate from a desire to create a U journey. What is that about? For me, here we start to scratch into something in the deeper wisdom layers, in the inherent natural forces. The way natural creative cycles move is an embodiment of the U as well. I'm thinking also of the 4D Mapping and how we teach it, for example. It's got this kind of U movement. Or the tool we call Stuck[3] and how it's got this movement too. It can be understood with or without the language of the U journey. It's understood as a natural progression or unfoldment of something from a point of initiation.

Arawana: The origin of 4D Mapping happened before a Global Forum[4]. There had been a lot of exploration before then, in terms of embodiment. Then we had a gathering before the Forum where we invited three 'constellators' from Europe who work with organizational constellation, and we tried out a whole bunch of different things over two days. Some were embodiment practices, some were other kinds of improvisation.

Occupy Wall Street was happening at the time.

You (Otto) suggested we make a 'map' of Occupy Wall Street.

Then you got a chair and put it on the floor, you stood up on the chair and said: "Banking". Then someone came in and stood next to you and said "Multi-nationals," and next was "Mothers". Then, people just came in with names.

And that was it. We set up the map. Then we started to move, and it went on and on. We moved around—I think it was 40 minutes. It was really long. We just wandered around with each other for an infinitely long time. Then finally we stopped, and there was a conversation about it. That was the last thing we did over the two days of experimenting with different kinds of things.

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[2] The arc of the U refers to the change process outlined in Theory U. A detailed explanation of the process can be found in the references listed below.

[3] The Stuck Exercise is a practice in Social Presencing Theater (see note below). https://www.presencing.org/resource/tools/stuck-exercise-desc

[4] The Global Forum was held in 2011, 2012, and 2014 in Cambridge, Massachusetts, and in Berlin. An online version of the event was held in 2020 (https://www.presencing.org/global-forum-2020). The intention was to create a platform to connect innovators and change makers across systems, sectors, and cultures in order to co-create a society that generates wellbeing for all.

Then, Otto, you said, “well, we'll just do that tomorrow with the 200 people at the Forum.”

And people did it. That was the beginning of 4D Mapping.

Beth: Arawana, what always amazed me was when Otto would say, “let’s do this tomorrow, or right away,” and you had never done it before (let alone with hundreds of people). You would embrace the grand experiment. I was so impressed by your willingness to dive into the deep end without much preparation.

Arawana: I was an improviser, so… I’m much better at making things up on the spot than preparing!

Deeper Layers

Julie: What other questions are interesting when we talk about the tools? If we want to share with others what they really are for and why they exist, what are the questions that would help us surface the deeper layers? Because it's more than just “how did it start?” What else brings us to the real stuff?

Marian: One thing is the role of Sensing in all of it, how the tools themselves activate or enable access to seeing into current reality. Then seeing the glimmer of potential reality, or possibility. Then bringing that through. Given also the times we're in, where old tried and trusted interpretations of everything are just falling way short of the mark, I do feel that Sensing becomes a capability that needs both a credible place in the world as well as capacity to do it.

> *Sensing* refers to expanding one’s perception by moving beyond one’s own ‘bubble’ as an individual observer to begin to perceive reality from the social field. It involves shifting the inner place of observation from the head to the heart.

Arawana: There's what you said, Marian, in terms of the Sensing, also the Presencing and then that all three tools are *doing* practices. There’s something we're engaged in *making*, some kind of engaged creativity that's called upon with all three of them. If we equate creativity or innovation with *doing*, then it brings us through the whole cycle, the whole sequence of the U.

> *Presencing* blends sensing and presence. Similar to the concept of ‘sensing’, presencing involves shifting the inner place of observation from the head to the heart, but rather than perceiving from the current whole, perception begins to happen from the source of the emerging future. Presencing processes aim to help individuals and groups connect to the source of the highest future possibility and bring it into existence.

Otto: I have two reflections related to that. Marian, linked to your two comments earlier, one reflection is: how does that relate to the U? And the other is the importance of Sensing. Some people say, "well, now we all need to go out and bring the U into the world". I always feel that exactly the opposite is true, because you don't need to bring the U anywhere. It's already there. It's just not attended to. And all we do is provide methods and tools to attend to it and then follow the path which moves you, one way or another, into a U-type of process. Let's put it that way. So, it's already there. It's about paying attention to what's already there, at least in a dormant capacity.

The other thing—listening to the earlier conversation, I thought it was fascinating to listen to the origins of the 3D practice that you, Beth, and the 4D practice that you, Arawana, were sharing. It is always insightful to go back to the origin because that's the spirit we want to re-invoke and hand as a gift to others. What I see there is almost a triangulation of three things that are at the origin of each of them.

The first thing is: it's applied. There's an applied situation. You're doing real stuff. It's not like "I want to imagine something that's good in the world". No, it's the opposite. We're in trouble because tomorrow we have 400 people coming and we need to do something. It's being confronted with the needs of a real application context, and then not just projecting onto the people but really listening. That's the first element, connection to that situation and context.

The second element, I would say, is an aspiration or a deeper sensing capacity—really sensing with the heart and connecting with the highest future potential. So, yes, the Forum brings people together. But what is the highest potential of such a group? Imagine a possibility of science, consciousness, social arts, and societal transformation really coming together in a new way. It's not just an aspiration you project, but it's a deeper sensing capacity. Arawana, yesterday, in the Awareness-Based Leadership Program[5], you said: Awareness is not only awareness of self and of others, but also awareness of the field of possibility that's dormant within and around us. I think that's the second aspect—sensing into that future, sensing into what might be possible.

The third one is action confidence: Doing. It's having the confidence to say, "Yes, we'll do it tomorrow." Then we do it. It's really stepping into the unknown. And that is very, very applicable to people, because when you bring in 3D Mapping, or 4D Mapping into a traditional context—everyone is facing this threshold. Embodying action confidence does not mean being crazy. In the case of the 4D Mapping, it was grounded in competence, by which I mean YOUR competence, Arawana, to hold the space for that, and it was grounded in feeling it. Before you do something, you can sometimes FEEL whether or not it's going to work.

[5] Awareness-Based Leadership is a capacity-building program for professionals. https://www.presencing.org/uacademy

Feeling it forward. When we ended our first mapping prototype with the constellators, Arawana, I could feel it. And then I said “let’s do it tomorrow.” That was not a crazy move. It was based on data. The data was that feeling we had at the end of that prototype the day before. Those were some of the core elements at the point of origin. And it's worth mentioning, because sometimes you may have the other two ingredients but without that confidence to step into this unknown territory (that no one requested, let's say, in a client system) you are not likely to activate this deeper territory.

Marian: Linking to the action confidence, for me, is something about courage and the threshold of risk. There is a questioning there, I think, around what do you have to overcome in order to step into this bold gesture or this unusual way of doing things?

Arawana: I think the confidence comes from the fact that we feel that quality, and that we in fact have faith in this potential of human beings to really be human in the best possible way. And that's where the confidence comes from. That's where action comes from. It is being able to feel that. All three practices [tools] are set up in a certain way to let that come to the surface or to uncover that in some way.

Becoming the Change

Julie: What I was also thinking, listening now and preparing this afternoon, was that they are tools and practices that all help an individual and a collective to clarify what the potential is. They're usually used in a process of change, so it's to help clarify what is becoming or what could be done. But the actual intervention is the transformation. It's not only a practice that helps you clarify what can be changed. It’s changed by doing it.

Arawana: I think that's an important fact, that it's personal in that way. Everyone doing all three of these practices has to soften into something. We call it sensing, but you have to kind of sink into something, in order to move forward. You have to touch into something in order to collectively or individually move forward.

Marian: When we talk about dialogue, or actually any level four activity, we talk about the shift of sense of self, or identity. But basically, we're talking about a profound inner transformation that happens. You come out the other side different than you were when you went in. That, to me, links to what you're talking about, Arawana and Julie. The willingness to put yourself into the service of the change process. This then comes to, “be the change that you want to see,” which is such a trite phrase now.

> *Theory U* refers to an evolution of awareness from which action arises.
>
> Level 1: Habitual – inherited/automatic awareness

Level 2: Subject-Object – awareness of self and self-interest

Level 3: Empathic-Relational – awareness of other and inter-dependency

Level 4: Generative – awareness of the whole

Julie: I think that's an important one. It's the shift from talking about what should be changed to becoming what is changing. Through the tools, you're becoming one with the process. You don't have that distant look of, "well, this is the problem, that is the situation out there." The process of how we build in certain elements means you cannot do that. You become part of it. You change with it.

Arawana: As Beth said earlier, part of the change is recognizing that there is natural sanity, and there is natural health in the system, whether it's a body-mind-individual system or the team system or the larger system. It's what is hidden because of all of the conflict and fears and confusions and whatever. We're looking at shifting our attention and energy toward the basic sanity and healthiness and potential humaneness, humanity, that's in the system.

Beth: Maybe another way of saying this is that trusting is a part of holding. Trusting that this process is going to work, even at those points where it feels wobbly, or you might have doubts, or the person you're working with is confused, or even you're confused. A facilitator has to have the capacity to hold herself and to hold the process, knowing that it is tapping into a deeper wholeness.

Julie, I also loved your saying: "you are changed by doing it, you become the change." Again, it's not something imposed from the outside or a step-by-step formula. It is holding the process and the person all the way through, and trusting.

Otto: What I'm hearing over the past few minutes is different levels of the same larger theme. Ed Schein, for example, always pointed out that traditionally, people think first there's diagnosis and then there's intervention. He always said that every diagnosis is an intervention. The moment you connect with anyone in the field, the moment you start the sense-making process, that's already the intervention—that's the first intervention. There is no such thing as separating these two things from each other. The sense-making is already changing the field.

Sensing and Holding the Social Field

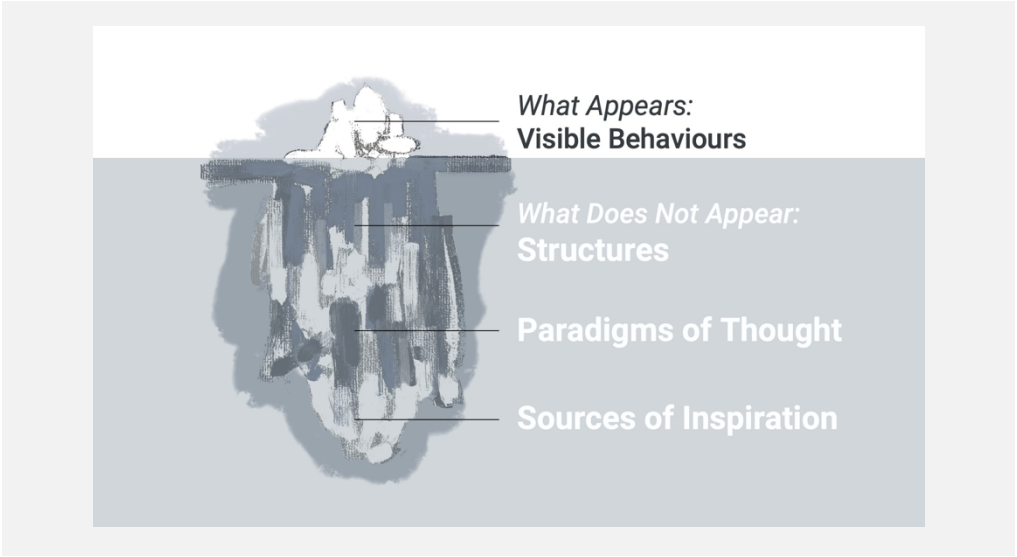
Otto: The second thing I'm hearing is the more vertical dimension of what you pointed out, which is actually connected with the core of co-sensing. It seems to be the case that all these tools are connected with a co-sensing phase. When I think back to my own experience of how this really works, I would say there is a horizontal and a vertical dimension that come together. The horizontal is: you

step into different perspectives. That's particularly evident in the co-sensing process. But it's also very evident in the 4D Mapping with the different voices. That's the first. But then the vertical dimension is that it's not just in your head, but you really sense into that with an embodied experience that is very organic if you move into another community and empathize with people there. That also happens in 3D or 4D Mapping environment. It's really the embodied experience of the social field that you go through which activates a deeper level of awareness, not only individually, but also somehow on a collective, a field, level.

That's really the instrument we are working on. I think at the end of the day that is why these things work. We activate and bring awareness to this deeper dimension of a social field. What do I mean with 'deeper dimension'? I mean, on the one hand, the gateway into that as a felt sense of all the different participants in the field, particularly the most marginalized—that's the gateway. But it leads you to the larger space of possibility. Because the surface part of the social field is current behavior. Current patterns. Then when you drop deeper, you sense into the field of possibility, which moves you into the domain of presencing, of course.

That's the bigger change territory that all these tools are components of and that's why, in a specific context, they can have such an impact.

Julie: The question that also comes to my mind and that people often ask me, is "what do you do?" Then when I answer, they say: "Yeah but what do you *really* do?" There is a complete difference between the words coming out of my mouth, let's say, and the work that we're doing, and then being able to articulate that as well.



When I used the iceberg model [above] to think about the visible and less visible dimensions of 3D Mapping, the dimensions were:

Collective practice to have shared understanding about current reality

Making structures visible

Uncovering qualities of relationships and their the coherence or lack thereof

Transformational shifts

Those were the four layers that I wrote to describe what is happening in 3D Mapping. But describing the exercise is very different.

If I facilitate a 3D mapping, I am super strong and crystal clear. It comes out as the instruction or like [machine gesture]. There is no uncertainty or confusion. At the same time, I'm actually a Barbapapa. A Barbapapa is this animation figure that is completely fluid, and that can become whatever it wants. So, I become a Barbapapa and become fluid around everybody who's listening. While their head is listening, you're also talking to other parts of them. Remember when I spoke to you, Marian, I said "what you did in the ELP[6] was magic. What did you do?" and you said, "I was talking". You sit on your chair and you're talking, but you then added, "with my attention, I was walking around the room, around the [back of the] circle, and really holding all with my whole intention." You were doing that [*open-armed gesture*]. If we can articulate, "that's what I do."

And yes, I'm doing [*machine gesture*], but at the same time, I'm doing that [*wide-armed gesture*]. That seems like a fascinating conversation. People see what we do, and say, "Okay, I'm going to do that as well, like, [*machine gesture*]". That's not the work. That's just the easy part.

Beth: What I hear beneath what you're saying, Julie, is the question "how do we make the invisible visible? How do we make explicit what we are doing inside ourselves while we're working with a group?" I think we might all articulate this slightly differently. Julie, you described Marian's inner process of attending to the whole room. I think it's important for each to be able to describe this inner stance. For example, I am aware of my heart filling the space and I can therefore sense what is going on in the "heart-field." If we can each articulate our own specific inner practice, it makes it easier for others to access and describe theirs. Marian's description helps me to surface my approach.

Arawana: I wanted also not to diminish the importance of the instructions. We say, "oh, well, there's this deeper level." But I actually think that the instructions themselves are a certain kind of container that allows the participant then to relax a little. One container is just the clarity of the instruction: what the point is and how you do it. And even though we say, "the essence isn't in the tool" there's something about the quality of that level of container. At least for Social

[6] Eco-system Leadership Program is an eight-month advanced professional development program run by the Presencing Institute.

Presencing Theater it seems very important that people aren't confused about what they're doing; that their mind doesn't jump up because of anxiety and then suddenly they can't understand anything. They're not hearing because they're thinking about how they don't want to do this or don't understand.

> *Social Presencing Theater* (SPT) is a methodology, developed under the leadership of Arawana Hayashi, for understanding current reality and exploring emerging future possibilities through embodied practice.

So, it's the way that we give the instructions, the pacing, the language, the words we use. I've heard people give instruction in Social Presencing Theater where they have the steps, but the words they choose are not the essence of the practice. The words aren't right. Even though the content—the steps—are right. So, the language that we use, even in the instructions, can set up a certain kind of relationship between spaciousness and freedom, but also the simplicity or restriction necessary to get to the point. I don't want us to think the instructions are the least important, because I do think that they carry a certain kind of transmission.

In Closing…

Otto: So, here's my closing question. If we now look back at the conversation that we had, it is really not just about tools, but about the essence of our work and how the tools relate to social fields—and also the essence of what we mean by awareness-based systems change and activating deeper agency in that. If you reflect on the conversation now, what comes to mind?

Beth: Otto, I think your articulation of the three dimensions—aspiration, action confidence, and application to the need—crystallizes the power of the tools, the power of the process, and the intention of the facilitator. This goes to the heart of what we do.

Julie: Something opened around the power of the instruction, how that creates a container. By being crystal clear with our instructions—the when, why and how—we create a container of safety that allows people to surrender to the process and open to the potential for transformation at the bottom of the iceberg.

Marian: For me, the thing that stands out from this whole session is something about a coherence of resonance, if I could put it that way. It started from the first opening words, of how good it is to be here, and how you called it Beth—stepping into a coherent space. Where there's an assumed, a rightly assumed, resonance. That then has become the sort of ground base to build on ideas or thoughts or somebody else's comments. How that's curated, how that's cultivated [is significant] because I think it's a very specific ingredient.

Angela: I think what stands out for me is the social field aspect of it from both sides: from the holding and being aware of it, and also from the other side—what does that mean for that field and its highest future potential? That also stood out for me, to always see the social field aspect of the work. Then the third thing, and they're all connected, is the trust that you brought in, Beth. Trusting that this is even there, that this is there, if you feel it or not. That this is already in the situation, that social field part of it.

Arawana: This is maybe off in left field, but it made me think that in Buddhism there are what are called three yānas: the Hīnayāna, Mahāyāna, and the Vajrayāna. The Hīnayāna is, "do no harm" and self-reflection and developing gentleness and kindness within oneself. Then the Mahāyāna has to do with the sense of bravery that you can go out and actually help other people and much of it is very high aspiration. Then there's a lot of mess, trying to actually be useful and skillful. But it's very much from one's heart. But then the Vajrayāna is this completely messy issue. Every life experience has this wisdom quality. There isn't any difference between what you aspire to and what is present now, which is extremely difficult to conceptually put one's mind around. But there's something about the conversation in which I feel there's a kind of 'this is the level at which you care for yourself, and you care for the instruction, and this is the part that really connects with other people and the field shift, and the kind of love we have for humanity'. But then the action part is how every single moment is the practice.

Otto: There are various things that come up for me. The first thing is how much I enjoyed the past 90 minutes, the pure joy of that. Which makes me aware—I think Peter [Senge] said it first before I started observing it myself—that the quality of a workshop is a function of the quality of relationships among the facilitators, those who hold the space. So the quality of what we saw being activated in the fields of the programs we have been doing together is a function of the quality of our relationships with each other. Maybe that's a fourth source condition—basically love of each other. I think that's the simplest way of describing all our relationships, which are really at the core, the source, of the generative nature of the field which we experience with each other. That's the one thing that's resonating with me, and also real appreciation for that.

If I think about what is the one thing that I learned over the years—when we look back now, 21 years of doing this work together—I would say one thing that I learned is: everyone is interested in impact, but before you go broad, you have to go deep. So that's what we learned, really, with u.lab. Before you have a broad, horizontal impact, you need to create the local roots, really deep, first. So, there is also this—what is the relationship between this deepening, which is often place- or community-based, and then the rippling out to a more democratized access of things. Maybe there's a rhythm between them. But personally, when I feel into my own situation, I feel I need to—at the same time—deepen vertically and also stretch horizontally. I wish it was first one and then the other, but it doesn't always feel like that. So, what is the right rhythm there?

But the main thing for me, I think, is gratitude for being part of such a field that is nourishing, also on the level of the being, and the level of the core. And that allows us to respond to a situation in ways that no one could have done alone, or no one could have done in subsets even. Together we activate this level of possibility, of connection, and also of confidence that is so much needed today.

Further Reading

All of the tools, concepts, and initiatives described above are part of the ongoing evolution of the Presencing Institute's work. A more detailed description of these can be found in the Theory U literature below:

Scharmer, C. O. (2016). *Theory U: Learning from the future as it emerges*. Oakland, CA: Berrett-Koehler Publishers.

Scharmer, C. O. (2018). *The essentials of Theory U: core principles and applications*. Oakland, CA: Berrett-Koehler Publishers.

Scharmer, C. O., & Kaufer, K. (2013). *Leading from the emerging future: From ego-system to eco-system economies*. Oakland, CA: Berrett-Koehler Publishers.

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