Carrying Medicine for a Non-Profit

Practical Organizational Change Applications of Process Oriented Psychology

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In partial fulfillment of requirements for a
Certificate of Process Oriented Psychology

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DEDICATION

To the "Community Inspiration Council" and its people,
keepers of a sacred vision for a better world.

DISCLAIMER

The views expressed are those of the author and do not necessarily represent the
"Community Inspiration Council", its Board of Directors, or the Process Work Institute.

INTRODUCTION

Motivation

Two stories exemplify my motivation for writing this paper.

After twenty years of service at Bonneville Power Administration, a large electric utility in the Pacific Northwest, I hit an invisible ceiling. I had bid on several supervisorial jobs. Even though I was well qualified and had good people skills, someone else was always selected. It wasn't your usual kind of discrimination. I am a white male. I had no major personnel conflicts in my history. Nor was reverse discrimination the cause. I honestly accepted the fact that, at each decision point, someone else was a better fit for the job. But what was missing? One day on a hike a fellow worker and friend said off-handedly, "Jon, they don't know what to do with a Shaman."

For the most part management needs people it can understand.

My second story is of knowing a Process Work Institute graduate. While he understood Process Work, he did not find a niche in the professional world where he could apply his new-found skills. His challenge, while specific to himself, highlighted for me the lack of guidance Process Workers have in applying their powerful tools in the consensus reality (aka mainstream) professional world.

While we might wish otherwise, a host organization has tolerance limits for doing things differently than it has always done them. We work within those limits or we work elsewhere. I will show with this paper how Process Work principles may be applied while honoring the limits of a host organization. I hope that other Process Workers and the Process Work Institute will benefit from this effort.

Approach

This case study focuses only on my in-depth experience with one organization. My stories demonstrate how Process Work techniques have been applied. The narrative is arranged somewhat chronologically to give the reader a feel for the cumulative unfolding of organizational change. Chapter 1 will orient the reader to the circumstances of this case study. At the beginning of each chapter I briefly explain relevant Process Work principles. The first three chapters highlight Process Work concepts that required little or no cooperation from anyone else in the organization. To maximize accessibility, Process Work concepts are in **_bold italics_** and other organizational change concepts are shown in **bold**. The Appendix offers a table that roughly translates between these concepts.

To protect confidentiality the subject organization will be referred as the "Community Inspiration Council" (IC) with its "Elders Program" and its "Imagine Our Future Program". Incidents depicted are as they happened.

1. CONSENSUS REALITY & PRIMARY IDENTITY

A person's primary identity is how he or she sees himself. My resume and my roles as a husband and father are part of my primary identity. One's primary identity may evolve over time as he or she travels life's path.

Consensus Reality is that aspect of life that most of us agree is true without much discussion. My shirt is red; the United States has a Constitution; and I am a Process Work student. The public face of an organization is loosely a matter of consensus reality.

<u>My Mission and Background</u>

My mission, developed over several years, can be stated in four words: **Carry Medicine; Create Sustainability**. Carrying Medicine speaks to psychological or spiritual healing. Such healing may be needed before physical healing can occur. For me Carry Medicine goes beyond working with individuals. Organizations need healing too. Likewise for me, Create Sustainability goes beyond working directly with the environment and technology to include people and their motivations. My mission and the consciousness that accompanies it is now my ***primary identity***. My intention is to honor both my spiritual side and my professional side.

When I obtained my masters degree in Electrical Engineering, my ***primary identity*** was that of an electrical engineer, and I went to work for an aerospace company. I experienced a life crisis around the age of twenty five. Suddenly my **primary identity** embraced my social consciousness, and I returned to college. I became a Registered Professional Mechanical Engineer and started a career in solar energy and energy conservation.

I took an early retirement in 2003. That same year I was certified as a mediator. After participation in several consulting project teams, I was recognized as a "senior" organizational development consultant by the Organizational Development Network of Oregon. I now call my sole-proprietor consulting business Creating Sustainability. Thus I have gradually shifted to my ***primary identity*** (i.e., career) from technical matters to working with people and organizations.

In 2007 I participated in the Process Work Intensive. Over six years I have taken numerous Process Work seminars. In 2009 I applied for and was accepted in the Process Work Certificate Program. I already consider myself to be a Process Worker. However, without a degree, that ***primary identity*** may not qualify as ***consensus reality***.

The Community Inspiration Council

I made it a point to find an organization to align with that appealed to both my professional environmental interests and my spiritual interests.

The Community Inspiration Council (CIC) has two primary programs. The Elders Program provides a forum for wisdom carriers to speak and for their presentations to be recorded and shared both through DVD's and on the Internet. The Imagine Our Future Program works in elementary schools to help children imagine their future through art and story. These facts are **consensus reality**.

The Community Inspiration Council, during its two-decade existence, has gone through several cycles of growth and contraction. It so happens that when I expressed interest in joining the Board, the Board had contracted to two people while the two programs were operating almost independently. Four people joined the Board when I did, but two had to drop off within four months. Three months after joining the Board I was elected President of the Board because I was proactive in planning and because no one else wanted the job. These facts, to those involved, were also part of **consensus reality**.

My willingness to serve was fueled by a vision of sorts. When I was briefly associated with the founding of the CIC, I felt that it could be most effective as a catalyst and supporter of other organizations with similar missions.

My being accepted into the Process Work Certificate program coincided with the ninth month of my tenure on the Community Inspiration Council Board.

2. VECTOR WALKS

Vector walks take seriously the phrase, "Walk in another person's shoes." One walks first as one party to a situation, then another and perhaps another. Generally I am one of those parties. One gets a dream-like feel for each. Then one walks a "summation vector" ("Big U") to find guidance and insights that may be helpful. Thus a Vector Walk distinguishes and then adds together separate elements of a situation.

Vector Walks can be used personally without direct involvement or permission of others. Therefore they can be used almost any time and any place. I have even derived useful insights from slowly drawing vectors on paper while riding the bus.

<u>A Walk With the Board</u> (May 2010)

I had recently been elected President of the Board. The tough realities of leadership where becoming apparent: There was no budget for the current year and no contracts were in place for those being paid to direct the programs; the Vice President and the Treasurer were not attending meetings; and one of the remaining four Board members had conflict with another. I was feeling overwhelmed.

I walked the following vectors one evening, drumming on my small drum as I did so. The first vector was for the Community Inspiration Council as a whole. The essence I got was that the purpose of the organization is to get in touch with the drum beat of the Earth. The second vector was for the Board. I imagined a shepherd running hard. Physically, I was running into stuff in the room before I wanted to stop. The third vector was for myself. I was cornered, only able to take a small step. I could hear the furnace behind the door; it reminded me of the Spirit underlying all. I was reminded that my marriage had my back; that is, my wife's support was strong and meaningful.

The Big U summation vector was a drum dance with many beats. Awakening spirits; fending off demons; proclaiming the message. I approached limits – the enemy, the edge of reasonableness – teasingly, daringly, like an Indian counting coup.

This was not a breakthrough moment in terms of what needed to be done. Instead it was a moment when I accessed some inner resources to stay with it, to not quit.

<u>The Program Director</u> (August 2010)

The Elders Program Director was constantly doing things outside of his job description. He repeatedly brought ideas to the Board that we did not even have time to consider. I wanted to honor his enthusiasm, but I feared he would burn out when we acted on so few of his ideas.

Before I called the Program Director to discuss my concerns, I did a vector walk. My vector reminded me of a child abused by his classmates while walking to school – hurting inside, stoic, a survivor. When I walked into a wall, I realized I was competing with the Program Director for HIS job. Walking the Program Director's vector, I felt him striding with purpose, looking for the greatest possible opportunity. He was serving Spirit, willing to change directions to succeed.

The summation vector reminded me to collaborate with the Program Director to achieve mutual objectives. I visualized General Robert E. Lee's cavalry – advance scouting, fast moving, intelligence reporting. The cavalry operated in coordination with the main column, not independently.

I had lunch with the Program Director and shared my experience as a person who was always pushing management's boundaries. I was not just serving management; I was trying to make the world a better place. I coached him on how to survive in that role. "Always get the work expected of you done well, so

management has no occasion to fire you. Be careful, because management will not always back you up. Manage your energy; you really are working harder than is expected. That said, you provide immense value to the organization, building relationships and identifying opportunities that may not come to fruition for years."

From that point on the Program Director and I had a great working relationship. I personally supported him on a couple of his initiatives – including the one described below.

The Earth Stewards Council (August 2011)

The Elders Program Director invited me to sit in on a phone call with the Executive Director of the Earth Stewards Council (a pseudonym). The Elder's Program had hosted two speakers from the Stewards with good attendance. We had produced high quality DVDs from their presentations. The Program Director had invited a third speaker and hoped that the call would result in a speaking date.

Before arriving at the Program Director's house I walked **vectors** on a nearby neighborhood street. The vector representing Community Inspiration yielded the image of hosting a family gathering – setting the table with enough silverware, wondering who is bringing what food. The vector representing The Stewards gave me the visage of friendly witches patiently stirring a sacred cauldron, round and round. They intended to serve all of humanity. That vector headed directly toward the Sun and its heat.

The summation vector, connecting the beginning of the first vector with the end of the second was very short. I felt electricity, sound waves, and ripples. I energetically perceived an EVENT when something happens, crystallization. The relationship between Community Inspiration and the Earth Stewards is symbiotic: They have a powerful message; we provide a quality forum.

Prospective Board Member (January 2013)

Prior to interviewing a prospective Board member, I did a **vector walk**. Walking her **vector** evoked the image of a friendly wolf in sheep's clothing. I had seen her facilitate meetings. The vector representing the Board yielded an image of an ox cart on a bumpy road – carrying a treasure that could save the world. The summation vector was a family on a journey, with a strong considerate father figure.

During the interview I asked the prospective Board member about one of the facilitations (of another organization) that did not appear to go so well. How did she feel about it? Her answer was telling. She had been working with the group for three years. Finally, they felt empowered enough to set their own spiritually-driven agenda. What looked like a run-away train was a raving success. In other words, she has the patience and skill needed to see a long-term vision to fruition – like a nurturing parent, like a responsible Board member.

I can happily report that the woman joined the Board -- and eventually accepted my role as President.

3. PROCESSMIND

"Processmind" is a deep source of psychological (some would say spiritual) grounding which allows one to access deep wisdom in responding to difficulty. Processmind refers to the deepest of three levels of reality: "Consensus Reality" is the perception consciously held by most people on a day to day basis – like physical dimensions and the need to eat. "Dreamland" is the realm of emotions and unconscious motivations. Dreamland may convey the need to be more spiritual or aesthetic or even businesslike. "Processmind" and "essence" (see Chapter 8) underlie the ebb and flow of dreamland. Processmind can be experienced as an abiding common ground or a pervasive presence "in the field". Processmind, literally the mind of the process, approximates some people's concept of God.

Conflict Between Board Members

A Board member was asked to prepare a Letter of Interest (LOI) to a Foundation previously unknown to the Community Inspiration Council. The Board member rose to the task admirably, completing the work in the two-day time frame given her. Then the person who initiated the task, a long-time Board member, sent an e-mail saying that the focus of the letter of interest should be changed. The new Board member felt upset and unappreciated. Soon flame e-mails were being exchanged. As a mediator, I avoid finding one person right and another wrong.

The next morning I asked myself what image represents the thing that disturbs me. I drew a group of arrows pointing in all directions. The words that came to mind were "dangerous chaos". I then asked myself what in me is disturbed. I drew a sail boat on gently wavy waters with the words "following a fair wind". I then went in my mind to the sight of my recent vision quest, an **earth spot** that could represent my **Processmind**. I immediately identified the chaos with the setting sun and the sailing image with the rising moon.

With my right hand I made cutting motions while voicing electrical sounds, "zwish, zwich, zwich". My left hand made wave motions and I hummed a familiar but not quite recognizable melody. I went back and forth between these energies, trying to merge them. Eventually I was moving my whole body as a boat dancing fiercely on the water.

I sat down and wrote the words that came to mind in capital letters. "LISTEN, PEOPLE, OUR MISSION IS TOO IMPORTANT FOR SMALL INDIVIDUAL STRUGGLES TO STOP US. STAY THE COURSE. WE WILL SOON BE DOING THINGS WITH SPIRIT FILLING OUR SAILS."

I called the new Board member, which I had avoided doing before, and listened to her at length. I also gave her some information and my perspective. Only then did I share an abbreviated version of what I had written down. She said she liked it.

But the conversation, amicable as it was, did not prevent the fire from reigniting. A few days later, just before a Board meeting, I received an e-mail saying that she wasn't going. It was full of fire and frustration and judgment. "It is with a heavy heart that I question my ability to act whole-heartedly on behalf of the Board… treated rudely… do I really want to continue? No… I have spent too much time and energy thinking and talking about…"

I immediately did another *Processmind* exercise. I contemplated the "x" energy that bothered me – the fact that the woman would quit abruptly when upset. The "u" in me that was disturbed was my need to keep the ship afloat. I visualized the Oregon Coast near Yachats as my *Earth Spot*. I saw the "x" as the wave rushing all the way up a narrow channel, exhausting itself in the process. The "u" was the channel itself. Mentally backing away from the scene to get myself in the *Universal Processmind* frame of mind, I reentered the scene and heard these words: "This wave too will subside." I needed to wait for the wave of emotional energy to subside.

I waited two days before inviting the woman over to lunch. My wife joined us in a very pleasant **meal**, reminding us of our *essence* as human beings (admittedly seen that way only in retrospect). The Board member and I did not talk about the issues at hand until we were almost out of time. In those few remaining minutes we determined that she really l wanted to stay with Inspiration, that she was willing to "clean the outhouse" by following through with the letter of interest as needed, AND that she could follow her passion of helping people find ceremony.

Access to *Processmind* in this instance did not resolve the underlying issues. Another event a month later precipitated the irritated Board Member's resignation.

Loose Cannon

The Elders Program Director arranged a meeting that turned out to be a de facto **encounter group** with the Board liaison. Outsiders were running the agenda. The liaison was not happy. She complained to me and to the Vice President. The Vice President called me. "Whenever we have conflict, it seems like the Program Director is at the center of it."

We could not afford to lose either the Program Director or the Liaison. By the end of our conversation, the VP and I had a tentative plan. It sounded good, but I did not think it would make anyone happy.

During a walk to clear my mind, I decide to do a *Processmind* exercise. The Program Director evoked the image of a monster that eats everything in its path, the *disturber*. For myself, I saw a kingly chair, eminently stable. For my sacred spot I chose Egg Creek in Oregon's Middle Santiam Wilderness, a wonderful place I had discovered just two weeks before. I looked around to find the monster. At first I did not see it. Then I recalled the large douglas fir trees lying across the creek. I realized there is a "ghost of violence" about the place – a time when storms continued for days and flooding water

ravaged everything in its path. The kingly chair of stability was the moss-covered stone I sat on with water flowing around me and over the three-foot waterfall at my feet. I acted out both the monster and the chair in an empty parking lot. (Yes it might have been embarrassing if I were seen.) I alternated between churning with my whole body and lying flat on my back, back and forth, kind of wearing myself out.

I cannot say I found the **integrated movement** I sought. But, while I was going back and forth, two statements came to me. "There is beauty after the storm;" and "The landscape contains the storm."

In other words, trust that the turmoil would pass. While dealing with the issues at hand, let the structural aspects of the situation bound the options we consider. Storms are messy; do not try too hard to solve these problems with my head.

Choosing an Assistant Administrator

We finished interviews of the four finalists for the new Assistant Administrator position. All four could do the job. Each had different strengths and weaknesses. I lay awake the next morning and brought the desert landscape to mind where I had done a trek, years earlier. I saw the juniper trees around me, all oddly animated in the same way. That is when these words came to mind: "Who is the most grounded?" The choice was obvious. And that is who the Board selected.

The Board wanted to have an office ready for the new Assistant Administrator. Our search yielded two viable sites. One was nice but expensive; the other seemed kind of sterile but was a hundred dollars less a month if we committed to it for a year. After some discussion the Board decided on the lower cost option, even though we didn't want to hold Board meetings in the office. The more I thought about it the more I felt our choice didn't reflect our values – but the Board had made its decision.

I again went to the desert of my memory. This time I saw myself as the ground water nurturing juniper trees from below. I likened our new employee as one of those juniper trees. My job was to help her flourish. In that moment an unseen path revealed itself to me. We could offer to commit to the new space for three months at a high rate and ask for that amount be applied retroactively to a year's lease at the lower rate if we chose to stay that long. The space manager agreed!

That desert and those trees were windows into my **processmind**.

4. DREAMLAND AND ALTERED STATES

An altered state may have direct connection to dreamland. That is we have access to information in the field that we might not otherwise be aware of. Those caught up in altered states may have access

to information and perhaps wisdom that the dominant culture marginalizes. In extreme cases we give these people labels such as "bi-polar" and "schizophrenic". Alternatively, a person may be said to be "marching to a different drummer" or "focused" or "impassioned", or "in the sweet spot". Intentionally accessing altered states can be a valuable organizational intervention.

Opening Ceremonies

The Community Inspiration Board has a tradition of starting its meetings with an **opening ceremony**. The ceremony is different each meeting and responsibility to lead the ceremony rotates between the Board members. A case can be made that each opening ceremony involves dropping into *dreamland*.

In March of 2010, shortly before I was elected to be President of the Board, it came my turn to lead the opening ceremony. This was a time of great stress. Among other things, we had so far unsuccessfully tried to create a budget for the year we were already partway through. I asked our host Board member for some candles. I expected several long tapered candles. Only a couple of the seven candles she provided fit that description. I proceeded with the ceremony anyway. I asked each person to light his or her candle with a match. Then, I asked one of the Board members to blow her candle out. "That's like when we get burned out." I invited another Board member to relight it his candle. It turned out to not be so simple with a fat candle whose wick was burned down. Someone else needed to help. It was a little chaotic, but the job got done. This scene repeated itself in one way or another as we all received help relighting our candles. I apologized afterward for the ceremony being less elegant than I had planned. One of the Board members responded, "It worked out exactly as it was supposed to."

We did not all remain in that ceremonially *altered state*. Only four of the six people that participated in the candle ceremony made it to the end of the year with Community Inspiration. The other two Board members dropped out because new employment challenges. (The Board serves without financial compensation.) However, one of those departing Board members talked with me for two hours on the telephone. That conversation inspired me to plan what the Board needed to address during the remainder of the year. THAT was the critical support I needed to relight my own candle.

It took until August to approve a budget for the year more than half done. AND, through persistence and mutual support, we brought on three additional Board members by the end of the year.

It fell to me again to lead the opening ceremony late in November of 2011. This time I found a piece of lava rock in a small stream near where we met. I asked that each person at the meeting say what he or she saw in the stone. One person described its triangular shape, the gas pockets, its roundedness. Another saw the stone as a potential sweat lodge stone, ready to go into the fire in preparation for that ceremony. I saw it as an entity rising from beneath the water, representative of the healing power of the water. When the ceremony ended, I said, "This is how different people see us. It reflects our diversity. Each answer is right in its own way. Our new Board members will see new facets of Community Inspiration."

At a focused Board meeting dealing with organizational structure, I nearly filled a shallow bowl with water. In it I placed two small saucers. I told the Board "This represents the Community Inspiration Council and its two main programs." I then passed the bowl to the person on my right, asking her to say what came to mind. She said, "Holy." Then it went to the next person. "Precious." When the bowl came back to me "Careful" came to mind. Then I carefully poured the water into a bigger bowl, placed the saucers in it, added some water, and added a third floating saucer. "This saucer represents the Earth Day event we are planning. And the larger bowl represents a restructured Community Inspiration Council." Now I passed the bowl around. Words such as "generous" and "stable" and "beautiful" were spoken.

Working with The Founder

The first Executive Director of the Community Inspiration Council returned to the Board, after a long absence, at the same time as me. She is a dynamic person, capable of organizing large conferences – which she did in the early days of the Council. She has earned the respect of many. She is comfortable operating without a written plan, using gentle but effective powers of persuasion to get things done. Over the years I have known her as a friend.

However, in my new role as President of the Board, I was getting frustrated. When planning my first Board retreat she expressed concern about "wasting time". When she volunteered to convene a committee to plan Community Inspiration's Anniversary celebration, I expressed desire for the Board to lead the project, she prevailed – keeping it to a committee process. When a gathering of past Board members was convened to decide the form of the celebration, her vision of another conference prevailed. My vision of an outdoors gathering did not fly. When a new Board member took the initiative to create a new vision, she intervened, stating that the eighteen-year-old vision that the rest of us did not know about was good enough. Item by item, her points had merit, but cumulatively I felt my ability to lead was being undermined.

Another chronic issue was that I was not able to hold the Board to the times on the meeting agenda. Yet the founder and other Board members were not willing to stay longer. The interim solution of this problem was to let the founder facilitate the discussions for the agenda I prepared. She commanded the respect to move the agenda.

It was apparent to others as well as me that we had a case of Founder's Syndrome, the inability of the founder to let go of the reigns of leadership. But, in our Board-recovery mode, we needed our founder's energy and experience. As current President I felt in a bind.

At the end of my first year on the Board, I tried to analyze the situation in terms of **polarities**. This is a conflict resolution principle in which you recognize the extremes people tend toward in response to

perceived need. I identified two axes: Past/Future and Relational/Practical. It was easy to place each of us on each axis. However, analysis alone had no energy.

One evening I tried drumming and spinning to deliberately take myself into an ***altered state***. When the room stopped spinning, I visualized myself as Eagle, the leader of Community Inspiration. And I visualized the founder far below as Grass, hardy, capable of regenerating after fire. I was flying and she was close to the Earth.

That way of looking at things served as a basis for a phone conversation. I asked for the founder's support. I recognized that her ways were rooted in experience, whereas I needed support in taking the initiative, even though some of my ideas were untested. Honoring our respective roles cleared the air. She herself recognized Founders Syndrome as a possibility. From there on, we have checked in with each other before rushing forward and have respected what the other had to say. My anxiety dissipated around The Founder (a typical ***ghost role*** in Process Work terminology) undercutting my leadership.

Finding a Way (October 2012)

My assignment from the Executive Committee meeting was to propose an agenda for the October Community Inspiration Board retreat. It was scheduled one week after a Community Membership and Volunteer meeting. This would be a very important meeting because the Board needed to set a direction for the organization in the wake of no fundraising and no administrative capability to follow through with our new members and volunteers. By the way, we could not afford to pay for a facilitator. By the way, the Board did not take my facilitation seriously.

I was feeling overwhelmed. I am President of an organization that will not take direction from the President.   What to do? I had to remind myself that I was a Process Worker with a strong spiritual path.

The only approach that held energy for me was to **pray** in our family room (not exactly a Process Work exercise). I took my hand drum down from the altar. I moved to the beat, around and around the room. In this way I arrived at the ***altered state*** of letting go and openness.

I was hoping for some sort of direction relating to the coming retreat. Instead, I noticed the television. I recalled that President Obama was scheduled to address the Democratic Convention…   From a Process Work perspective, the impending speech to the nation was "***in the field***".

Initially Vice President Joe Biden spoke about the President. Then I heard the President. Both speeches advocated policies and goals I favored. But what I really heard is how they both held up to the pressure – how hope was a critical component of moving forward, how making a good speech was part of the job, how getting elected was part of the job. They were masters in a very tough game. I went to bed inspired with hope that my modest responsibility could be executed adequately.

I'm inclined to give credit to God, Process Work, <u>and</u> the President for the motivation I received.

The next morning I looked up **Action Learning** on Google. Years earlier a mentor had told me about this tool to help organizations learn. It involves collecting data and reflecting on the meaning of that data, then positing possible options before making a decision. One in-depth article recommended giving intractable problems to new people.

At the retreat we took turns facilitating, even the two new Board members. My agenda reserved decision making for the second day so we could reflect overnight on the first day's conversations. We addressed the issues; we covered new ground; and my leadership was appreciated.

5. DISTURBANCE, EMERGING PERSONALITY & FOLLOWING THE PROCESS

One of the main tenants of Process Work is that a "disturber" can be a sign of a "personality" trying to "emerge". That means that the things that annoy us may be telling us something about which we have been unconscious. The principle applies to organizations as well. Disturbers can be either internal to or external to the organization. It is usually necessary to follow the process to discern what is emerging, both for the individual and for the organization.

<u>The Speaker Agreement</u>

The Executive Director of the Earth Stewards Council had a difficult message for the Elders Program Director and myself. The Earth Steward speakers were upset with the agreement language Community Inspiration was using. It was "colonial". We claimed all the rights to the video recordings. The Program Director was demoralized. I, not so personally invested, saw opportunity within the setback. I did not like our deep-legalese agreement form either. It was the antithesis of values we were promoting.

I now had an external ***disturber*** to confirm and amplify my internal ***disturber***.

With the blessing and review of the Program Director I immediately wrote a letter as President of Community Inspiration, offering to revisit the earlier contracts. I closed by saying, "This is a powerful and necessary lesson for Inspiration. It will help us learn to walk our talk and ultimately be more effective in helping to transform the world." I followed up a month later with another letter that gently reminded the Manager of the ways we had already supported the Earth Stewards with fundraisers.

The response from The Stewards was immediate – so immediate that I sense it had been composed before I sent my second letter. They requested that respective videos be copyrighted to each Steward personally. They also wanted prior approval before any use of the videos by Community Inspiration.

The good news is that we had established a dialog. The troubling news is that The Stewards apparently were uninterested in helping the Inspiration Council meet its financial challenges. The fact that this was a typical *rank* issue was not lost on me. In perception at least, the Community Inspiration Council as the host of the Elders Program had **structural rank** over the Earth Stewards. The Stewards, on the other hand, were exercising their **spiritual rank**. I drafted another letter focusing on mutual respect, but it didn't get past internal review. We were, at least temporarily, at an impasse.

Most of the unneeded language was about protecting Community Inspiration from being bothered by the speaker ever again. Before showing our agreement to our next speaker, I edited out phrases like "in perpetuity", "to the fullest extent", and "any and all".   Even so the elder wrote back "I cannot sign this as it is… I hope we can arrive at an agreement that allows you to record without having to return to the plantation." She had replaced the Stewards in the role of the **disturber**.

The difference is that she was willing to work with us. In other words she held us to our **edge**. That gave me enough time and sufficient urgency to convene an ad hoc subcommittee to develop recommendations to revise the standard agreement. This was the cauldron where Community Inspiration made the critical paradigm shift. We agreed that the copyright for the material should be *owned by the speaker*. The rest of the agreement was about defining how we could use the video and how the speaker would receive in compensation. We reduced the agreement from two full pages to one page while adding a mediation provision.

The speaker liked the new draft and wanted to sign it even before we were able to edit the typos. She said her talk would be about "The Conquistador Mentality". Community Inspiration had finally let go of the idea that we owned her words just because we had the means to produce a DVD.

The speaker also offered to endorse our good-faith in any ensuing conversations with the Earth Stewards. Relations again normalized.

 By **following the process** of crises and opportunity we forged an alliance with an elder, restored our reputation, and **emerged** in the eye of the speakers as a generosity-based organization.

6. DEEP DEMOCRACY

Deep democracy is a practice of giving all perspectives a voice and honoring that voice. This includes the "disrupter", the person who doesn't fit in, who is seen as a troublemaker, unbalanced. Stereotypically, organizations seek ways to eliminate disrupters – who do not, who are embarrassing, who piss people off. Process Work teaches us that disrupters bear gifts; they surface important shortcomings in an organization; they represent a marginalized part of everyone's mind.

<u>The Program Director and the Video Producer</u>

After initial camaraderie the Elders Program Director and the Video Producer were struggling. The Elders Program sponsors presentations by wisdom keepers which are video recorded and sold as DVD's and excerpted for U-Tube videos.

The Video Producer started out volunteering his time to record the presentations in 2005 or so. In 2009 the Program Director was given responsibility for the presentations and the sale of the resulting DVD's. At first the two of them worked well together, both having contracts for modest compensation. Over time a seemingly irreconcilable difference ensued. The Video Producer railed against being directed, and the Program Director felt compelled to control Video Production.

I spent hours with both persons. Initially I met with them separately, learning about what they did and their motivations, acknowledging their dedication and accomplishments. Then I arranged to mediate with the two men and another Board member who was familiar with the program. The outcome was procedural. Both men would meet monthly with the other Board member to make decisions, the Board member arbitrating as needed. However, the tension and lack of collaborative spirit remained.

Off-line I observed that the Video Producer and the Program Director were actually playing **ghost roles** that were quite different from their personalities. The Video Producer represented the *Artist **role*** in the organization, even though he himself is not overtly spiritual. The Program Director represented a new *Pragmatist **role***, though he is openly driven by Spirit. I recognized the need for both roles. But I felt powerless to defuse the situation.

In May of 2011 I presented the situation to the Process Work Organizational Case Crystallization class (with Arny Mindell facilitating). The recommendation at the end of the dialog was that my organization should have an **open discussion** with everyone present so that each of us could recognize the *Artist* and a *Pragmatist* struggling within us. I planned to do that at the upcoming (July) retreat.

Unfortunately, the Video Producer could not attend.

The best I could do after the retreat was orchestrate follow-up three-way conversations with first the Program Director and the Board member and then the Video Producer and the Board member. The Video Producer and the Program Director agreed to be more inclusive in e-mail communications while still working through the Board member – another procedural result.

Gradually, however, the situation had improved. The Program Director made it a point to publicly thank the Video Producer during events. The Video Producer found a way to support the Program Director during a difficult committee meeting. Interviewing the presenters and delivering DVD's proceeded seamlessly. Successful speaker events and high quality videos followed. One of those videos attracted the attention of foundation that eventually supported Community Inspiration.

About nine months after the initial mediation, I was told by the Program Director that he and the Video Producer had finally had a heart-to-heart conversation and agreed to go forward with no hard feelings. Apparently, the *field* that had perpetrated the difficulties between these men had dissipated. Perhaps our several conversations were not in vain.

Sadly, the Video Producer left the organization when he was not included in the next year's budget.

The Annual Retreat (May 2011)

I wanted permission to air our controversies in an open dialog during our annual retreat . The simple answer from my Executive Committee team was a gentle "no". Too risky. Unpredictable outcome. Prospective Board members would be present.

The Executive Committee, with my concurrence, arranged a facilitated **Conversation Café** at the retreat. **Conversation Café's** are generally structured so that several tables work on the same question, thus surfacing the diversity of perspectives present and revealing common ground.

The facilitator directed us to our tables. We drew on the paper table covering and spoke about things we had heard or observed earlier. We listened to each other. Sometimes one of us would add something to another's words or drawing. There was no consensus at the end of our three hour "conversation". However, three words were spoken again and again: "listen", "heart" and "intention".

The **Conversation Café** proved to be a slow-motion **open meeting** in the spirit of *deep democracy*.

The next day we answered the questions "What is my intension?" and "What is Community Inspiration being called to do?" For the most part, we gave non-concrete answers. But we felt really good about each other and our commitment to Community Inspiration. We were in *dreamland*.

When I got home, I wondered what we had really accomplished. We still needed to determine what roles new people would play. We needed to re-examine the program spending in the light of income shortfalls. Issues around the big fundraiser remained. It took at least two weeks for me to realize that we were actually playing out the polarity between Artist and Pragmatist. The retreat helped the Board balance its oppressive business-like intensity with two days of reveling in its Artist soul.

The Anniversary Gala (November 2011)

The financial solvency of Community Inspiration hinged on the success of the 2011 Gala fundraiser. Grant funding had mostly dried up due to the economy. One contractor had voluntarily decided to forego the income she was receiving while cutting back in a way that others could pick up the critical pieces – this even though her home was in danger of foreclosure. The anxiety around the fundraiser was palpable. The lingering Great Recession was in the *field*.

Community Inspiration had not hosted such a fundraiser for five years, and Board members disagreed about how things should be done. The fund-raising committee initially wanted nothing to do with the Gala since it was originally proposed to support a conference. Then the Fundraising chair started to direct planning for the oral auction, the request for donations, and how to promoting membership. Silent auction planning was in disarray. The Imagine Our Future program director planned to use masks and a slide show. Another Board member wanted drumming. I wanted to tell the crowd about our future plans. There was not time for everything. The Board meeting where these things were talked about ended in an emotional meltdown. I complained that Board members lacked self discipline in going on and on about their particular issue. In this way we were engaged in a slow motion ***deep democracy conversation***, and we were experiencing an organizational ***hot spot***.

Even so, a team of people, including some volunteers, worked hard to make the Gala happen. Impromptu working meetings were well attended. The founder stepped up to better choreograph the silent and the oral auctions. Our volunteer auctioneer got coaching from an experienced auctioneer. More than enough auction items were donated. I was recruited to make gifts to honor past Board members. My wife taught me how and did half the work. Most Board members found ways to contribute to the overall effort. Publicity and invitations were handled in good order. Quiet negotiations allowed those to attend who had no money. All the Board members and our contractors came to the Gala. In so doing we experienced ***momentary consensus*** as an organization.

You could feel a collective sigh of relief as the room filled with more than a hundred people. Even a significant breakdown in the audio-visual equipment did not dampen the momentum and enthusiasm generated that evening. In the end we made more than $18,000 – well beyond our expectations.

We needed to have those difficult conversations, more or less despite our intentions to avoid them, before we could align around a major event. In other words, the contained unpleasantness of ***deep democracy*** led to outstanding results.

Focused Board Meetings (Spring 2012)

Recognizing the need to take time to really listen to each other, the Executive Committee proposed to the Board that we have four "focused Board meetings" – in addition to the regular monthly Board meetings.

The first focused Board meeting in January 2012 was devoted to Community Inspiration's Mission, Vision and Values. We used an **Appreciative Inquiry** approach. The outcome was a revised mission for the organization.

The February focused Board meeting dealt with structure. The outcome was a circular organization model that replaced a dominant culture hierarchical model assumed by the dominant culture – including

myself. (The opening water ceremony is described in Chapter 4. The pre-existing de facto organization structure is described in Chapter 8.)

The March focused Board meeting addressed the relationship between the Board and the Elders Program. It was conducted as a formal **talking circle**, to deeply communicate rather than make decisions.

April's focused Board meeting was intended to address future programs. Instead we used the time to prepare for the upcoming conference – another event that really required our collective best effort.

Thus the Board moved very carefully with quasi **open meetings** *(i.e., deep democracy)*. Thus Community Inspiration moved from a personality driven organization to a collective-intention inspired organization.

7. RANK

Rank is when one person is perceived to have a higher status than another. It is situational. The stereotypical example is the supervisor-employee relationship. That is an example of "structural rank". That same employee will go home and have parental rank over his or her children. "Psychological rank" and "technical rank" become apparent when a people have behavioral or technical skill that claims respect. A small woman can control a large man with emotions and allure. A Nobel Prize winner can claim more respect than a CEO. "Spiritual rank" arises when a person has the ability to draw on powers much larger than him- or herself. Gandhi and Mother Teresa moved mountains with the force of their commitment. A priest or a Medicine Man may be able to move a person to heal in a miraculous way. "Situational rank" may apply where circumstances are different than the culture at large. A wealthy person may have low rank in the barrio.

Rank is a description of psychological reality, neither good nor bad in the abstract. There are plenty of examples of abuse of rank – a stifling supervisor, an abusive spouse, a priest who molests, a cult leader. Conversely, it is a worth studying how one can use the rank he or she has in a healthy way.

The Administrator

One of the two Board members who kept the lights on before I joined was taking a small income as Administrator. She took care of correspondence including thank you letters to donors, kept track of cash flow, wrote an occasional newsletter, and kept track of the organization's records. I was lobbied by other Board members to institute a policy that a Community Inspiration contractor cannot sit on the Board. Potential funders, it was argued, might look askance at the situation.

As President I resisted forcing the issue, initially on practical grounds. We had a very small Board with lots of work to do. The functions the Administrator performed were essential. She was in danger of having her house foreclosed. And there was no evidence of improper handling of money.

As the Board grew, the pressure to remove the Administrator from the Board continued, and the grounds for my circumstantial reticence weakened. Still I refused, with the support of the Executive Committee, to force the issue in an open Board meeting.

I explored this situation with a Process Work seminar partner. What really resonated with me was that woman who filled the roll of Administrator needed to be treated as an elder. You don't fire an elder. You honor her *rank*.

At the fundraising Gala, I honored our Administrator as one of the mothers of Community Inspiration. I presented her with a rock on which I had carved the Celtic Tree of Life.

The woman who held many roles in keeping the organization functional eventually retired from each of them – at times of her own choosing.

The Board President (November 2011)

I took a much-needed two week vacation after the Gala, starting on Thanksgiving of 2011. This gave me opportunity to reflect on my accomplishments as President of the Board. I had presided over a Board that had grown from two to nine people. We financially broke even for two years in a row. Our programs were running well. And the conflict between the Program Director and the Video Producer had been resolved.

Somewhat unconsciously I had fulfilled my role as President of the Board more as a facilitator than a visionary or a boss. Facilitation was my leadership style and what Community Inspiration needed, the best use of my *rank*.

Toward the end of my vacation, I realized that another good use of my *rank* would be to write individual letters of appreciation to all the Community Inspiration Board members and all of our contractors. That task took three days, time that would not have been available had I not been on vacation. On each envelope I affixed old commemorative stamps with themes befitting that particular Board member.

8. ESSENCE

Three levels can be considered in any interaction: consensus reality, dreamland and essence. Essence is the deepest level and most likely to establish the common ground within any group. It also may be the hardest to see. A fish may have trouble understanding that an essence of fish is to swim in water. Arnold Mindell, founder of Process Oriented Psychology, once said, "One reason that Americans don't

want to let go of their personal car is that this country was founded on the principles of freedom and liberty." Essence has profound implications in organizations.

A person or organization can have more than one essence. We are both human and star dust.

Autonomy & The Entrepreneurial Spirit

Why was conflict manifesting itself in so many ways, despite my supposedly enlightened ways of responding to it? This question nagged my tenure as President of the Community Inspiration Board.

 Was it my leadership style? I tend to be collaborative. Some people have wished that I were more authoritative, except when I challenge their authority. Were people simply holding onto the past as we tried to grow the organization? I thought so. I was religiously careful about any change process. While I could claim successes, conflict kept arising in new places. Was there need for better communication? Or better procedures? Or more self discipline? Or more appreciation? I tried to motivate improvements in each of these areas, but hair-trigger sensitivities persisted.

For example, a long-time volunteer tersely responded to my suggestion how we might approach a newly-discovered grant opportunity with an approaching deadline – even though I made it clear that it was okay not to apply.   She was a friend and an otherwise balanced and generous person.

One day I tried to diagram the Community Inspiration organization. I got stuck. The traditional top-down organizational structure didn't fit reality. Then I flipped the chart upside down. The Board of Directors was at the bottom and the programs were at the top. That resonated. The real authority in the organization rested with the two major programs. And both programs were very resistant to even the hint of direction from the Community Inspiration Board – especially me, the Board President.

When I shared the reality-based organization chart with the Executive Committee emotions were released that I did not know I had. No wonder I was so frustrated for so long. The State says that the Board is responsible for everything in the organization, yet the programs did not recognize that authority. How could the Board plan for the organization while the programs saw no need for change?

When I calmed down, I pointed out that Community Inspiration had a kind of post-traumatic stress disorder resulting from the years when the Board was really just a legal shell while the programs persisted, practically on their own.   Part of Community Inspiration's DNA was about surviving those years. **Autonomy** had become an *essence* of the Community Inspiration Council. This was true even though our programs stressed community.

It took another few days until I discovered an even deeper essence. The Community Inspiration Council was essentially founded as a follow-through to a 1991 conference. This conference was successful largely due to the personal initiative of Community Inspiration's founder. Every program since then has

originated as the result of someone's personal initiative. In other words **the entrepreneurial spirit** is another part of the organization's *essence*. No wonder top-down management techniques do not work! No wonder Community Inspiration has a history of instability.

Put in a positive way, Community Inspiration, more than most organizations, needs leadership and structure that support the entrepreneurial spirit – **encouragement, facilitation, barrier removal**. The most effective organizational **planning** would be asking program leaders what they want to do.

<u>Policies and Procedures & Guidelines</u>

Board members repeatedly pointed out that the Community Inspiration Council lacked **policies and procedures**. Any 501c3 with an $80,000 budget should have some established understandings. For most of my three year tenure I did not promote policies and procedures because they seemed superficial to resolving deeper organizational issues. Delineating procedures when the *essence* of the organization is self initiating, is not likely to be useful.   Expecting entrepreneurs to take direction is a thankless task.

Instead I proposed the idea of "**guidelines**". Guidelines would help people get things done in the easiest possible way without telling them what to do. As a **pilot effort** I wrote three guidelines: one for alliances and partnerships, one for Board meetings and one for writing guidelines.

9. INTEGRATION

Integration, from a Process Work perspective, is the principle of blending the newly-embraced emerging identity and the old primary identity.   Often, when someone achieves a breakthrough, he or she wants to throw off the old self like a pair of worn-out shoes. But in the case of identities, the old self knew many survival skills – including perhaps how to make a living. The new self, say a newly-minted Process Worker, often has a long and/or steep learning curve before self-sufficiency is achieved. Choosing to use some of those old skills in new ways can be helpful.

<u>Becoming the Best Community Inspiration Council Possible</u>

The work of evolving an organization is never done, unless it closes its doors.

From a conventional organizational development perspective the work of restoring the vitality of the Community Inspiration Council is well on its way. As of this writing, we have an active Board of dedicated hard-working people. We have a treasurer who pays close attention to financial and legal affairs. We hired an administrative assistant who will keep track of donations and keep in touch with members and volunteers. We are bringing on line a new website platform that will allow us to reach out

to the world. And we have a fair understanding of our intentions, why we exist. These are necessary and good things, consistent with maintaining a sustainable non-profit organization.

And there is deeper work to be done, work in progress, but still fragile. I assert that it starts with acknowledging Community Inspiration's **essences**. During my tenure I have identified these **essences**.

- ❖ Being spirit driven – People engaged with Community Inspiration do not just see this as a job. It is an extension of their personal mission.
- ❖ Being entrepreneurial – There is a history of self-initiation and then husbanding the resources to accomplish something.
- ❖ Being autonomous – There is a value of self-sufficiency and a resistance to being directed from an authority or a Board of Directors.
- ❖ Being dominant culture – Community Inspiration's aspirations are activist in the best tradition of dominant culture reformers.

Honoring these realities has been **integrated** by:

- ✓ Including ceremony as an "essential" component of Community Inspiration activities.
- ✓ Initiating the use of guidelines rather than policies and procedures.
- ✓ Adopting a non-hierarchical organizational structure.
- ✓ Changing agreements so that speakers own the video productions made of their work.
- ✓ Initiating a generosity-based model for giving away our work and asking for donations.
- ✓ Using occasional focused Board meetings to increase communications around critical matters.

If these initiatives are to be sustained, they must be proven practical, and underlying reasons for them may need to be viscerally understood. A starting point for appreciating the potential for **integration** is the now-conventional wisdom to **honor, not just tolerate, diversity** in its many manifestations. More perspective, thriving creativity and greater ownership will follow. **Integration** requires conscious attention to both the old and the new.

Headaches

Three years as President of the Community Inspiration Council Board has been a tough journey. Numerous evening meals were interrupted and I experienced numerous sleepless nights. My counselor heard me say "and I'm not getting paid for this" twice in one session.

I decided the real payoff for me is an experiential education.   I learned how to apply the Process Work principles described in this paper. I can prepare for a meeting with a **vector walk**. I can facilitate an extended conversation a la **deep democracy**. I can draw upon the wisdom of **processmind** in seemingly impossible circumstances. I can intentionally invite people to visit **dreamland** to better understand what we are trying to do. I can diagnose the pervasive influence of **essence**, and I can suggest practical responses to that deepest of realities. I will **integrate** these skills into the service I provide other organizations and causes – or perhaps in a different role with the Community Inspiration Council.

During my tenure **headaches** over my right eye occasionally claimed my attention. They were brief but intense. A Process Work *bodywork* conversation with the **headache** suggested that my Community Inspiration commitment was resulting in unhealthy stress. I needed to honor my introvert nature. I needed to retire as President of the Board. After this decision was shared with the Board, my **headaches** abated. An MRI in January of 2013 showed no pathologies.

Another Process Work experience with *processmind* gave me needed perspective. I saw that I am part of a long line of activists. My ancestors include Jesus and Mohandas Gandhi and Rachel Carson. The *essence* of me will not die, either to Community Inspiration or to the world, because future generations of my lineage will pick up where I leave off. More prosaically, my responsibility as President of the Community Inspiration Board was to keep the lights on until others were ready to accept that responsibility. This I did for three years.

APPENDIX

TRANSLATING BETWEEN PROCESS WORK AND ORGANIZATIONAL DEVELOPMENT*

Process Work Terminology	Conventional and Organizational Development Terminology	Tips
Primary Identity & Consensus Reality	• **Job, career** • **Degrees, certification** • **Mission statement**	• One's *primary* **identity** can change life experiences are *integrated*. • One's ***primary identity*** may not match ***consensus reality*** without acknowledgement or affirmation.
Vector Walks	• **"Walking a mile in his/her shoes." "Going to the balcony."** • **Respecting diversity**	• Use ***vector walks*** to avoid confrontation without marginalizing the issue. Prepare for difficult conversations with ***vector walks***. • ***Vector walks*** can be done while walking or, on paper, while sitting. • ***Vector walks*** are easily explained in terms of conventional psychology.
Processmind	• **Getting grounded, centered** • **Visualizing** • **Praying**	• ***Processmind*** exercises help w/ complex issues & relationships and can be prayers for both believers and non-believers. • One can take ***vector walks*** and access ***processmind*** any time.
Dreamland & Altered States	• **Ice-breaker** • **Opening & Closing ceremonies** • **Drumming** • **Retreat** • **Meals together**	• Mini-ceremonies increase creativity, awareness objective(s), common ***dreams***, and organizational ***essence***. • Closing ceremonies highlight connection & accomplishment. • A new setting can free up time & willingness to listen in new ways. • ***Dreamland*** is temporary without ***integration*** with ***consensus reality***.

*Not comprehensive. Material drawn from author's experience with one organization.

Process Work Terminology	Conventional and Organizational Development Terminology	Tips
Disturbance, Emerging Personality and Following the Process	- **Conflict** - **Rejection by client** - **Needs of client/marketplace** - **Resignation(s)** - **Pilot project** - **Headaches**	- Use a conflict and/or rejection to get more aligned with *emerging* values and/or *essence*. - Create new programs around client requests (i.e., *disturbances*). - A pilot project can hold us to "the *edge*" while we get comfortable with a new approach. - "You can fire the person but not the *role.*" – A. Mindell.
Deep Democracy	- **Mediation** - **Appreciative Inquiry** - **Conversation Café** - **Bi-lateral conversations** - **Committee dialogs** (maybe) - **Focused Board meetings**	- A *deep democracy* strategy: Negotiate for permission, face time, and structure to promote listening, hearing, deep understanding. - Unrestricted conversations may be perceived as too dangerous. - Balance *process* with production. Otherwise you'll lose people. - Don't be too proud. Real resolutions *and* fruitions often take time.
Rank	- **Elder** - **Founder** - **President** - **Honoring** - **Leadership** - **Awareness** - **Letters of appreciation**	- Raising awareness of *rank* empowers both victims and leaders - Use *vector walks* and *processmind* to address *rank* excesses. - Providing appreciation is a valuable use of *rank*. - The best use of structural **rank** may be to facilitate rather than control.
Essence	- **Founding principle(s)** - **Long-term conflict** - **Post Traumatic Stress Disorder (PTSD)**	- *Essence* issues can be masked by events and personalities. - When techniques (conventional or Process Work) do not work, there may be an *essence* issue.