



Chapter Two

Cultivating Leadership through Deep Presencing and Awareness Based Practices

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Throughout the past century, leadership development has focused primarily on leaders' behaviors or skills. While these are important, there is also a growing understanding of the need to cultivate the subtle, internal qualities of the leader's self as fundamental to leadership. Following from this view, it is our proposition that cultivating and enacting key forms of awareness based interventions and encouraging practices of deep presencing are foundational to leadership development.

In this chapter, we examine deep presencing (Gunnlaugson & Walker, 2013) in the domain of self-awareness and through the lens of leadership skill development. In particular, we build on the work of presence (Scharmer, 2007; Senge, Jaworski, Scharmer, & Flowers, 2004) by introducing deep presencing as a key leverage point for engaging the leader's self in the workplace. We then explore this further by linking it to the concept of self as soul (Reams, 2007b, 2012). Cultivating leadership skills is then considered through the lens of cognitive development (Kegan, 1994; Kegan & Lahey, 2009, Torbert & Associates, 2004) by examining how awareness based practices serve in cultivating personal and professional growth in the leader and organization as a whole. Finally, we use Fischer's (1980) skill theory as an approach to illustrate the practical importance of cognitive development in the context of



leadership skills, and we offer examples from a corporate leadership development program.

Deep Presencing

Since its inception, Theory U (Scharmer, 2007) has challenged the assumptions of traditional leadership and management thinking and in turn offered a significant change method that has been implemented across a broad assortment of international businesses and communities. Scharmer (2000) emphasizes the leader's self as tool and "the capacity of the 'I' to operate from the emerging larger whole both individually and collectively" (p. 22).

While Scharmer (2007) has directed attention to self as the "blind spot" of leadership, it has been noted that there may be a blind spot in how this is conceived (Reams, 2007b). Scharmer (2007) frames the self in the state of presencing as "a moment when we approach our self from the emerging future" (p. 163). To clarify this process, we introduce deep presencing (Gunnlaugson & Walker, 2013) to extend and shed new light on what is at stake for leaders in the presencing process. In our view, conventional presencing conceptions and practices tend to underestimate the depth and nature of change involved with the leader's self-sense and so risk oversimplifying or outright ignoring the fundamental source from which leaders draw their power, influence, and creativity.

A particular challenge that we perceive as fundamental to this is that a leader's attention and awareness are prone to becoming insular and disconnected in volatile, uncertain, complex, ambiguous (VUCA) and crisis situations within organizational culture. Bohm (1992) and others have explored how our thinking process becomes problematic and incoherent when left unchecked without sufficient awareness and mindfulness in our day-to-day functioning. Without this requisite awareness, we tend to get caught up with and in turn conditioned by this unconscious mental

process, giving rise to unconscious social practices of mind and tendencies to identify with and in turn defend these images by filtering or manipulating our experience of reality to conform to them. Thus, learning to let go, moment to moment, of our preconceived notions of who we are and what we know as we engage in day-to-day management activities becomes an essential leadership practice to counter the inherent self-deception of mind and the energy invested in these images of self and the subsequent social world it creates (Arbinger Institute, 2010). Through deep presencing practice, the possibility of a more coherent, or unconditioned perception of the leader's self and the reality that is co-unfolding can be gleaned as it is emerging.

Our basic position is that deep presencing provides an ontological path into the essence of beingness from which leaders can sense, articulate, and bring forth new visions of change within their organizations. Deep presencing offers an ontologically distinct means for accessing stillness, discernment, and generative action amid destabilizing organizational conditions of uncertainty and disorientation (Gunnlaugson & Walker, 2013).

What does this more fundamental shift in a leader's self-sense involve? In part, it is learning how to be in, and more fully orient from, what is arising from our engagement with the present moment. This involves noticing, suspending, and letting go of our preconceived and conditioned notions of who we are (Reams, 1999) to access a more direct perception that arises within the deep presencing phenomenological world-space. Deep presencing, in this sense, becomes a more foundational presencing practice for leaders, that brings forth and illuminates a new internal set of conditions. Deep presencing calls on the need for shifting not only the self-sense but the self-constitution of leaders and is required to more directly access the source of the emerging personal and social reality by engaging directly in the process (Gunnlaugson & Reams, 2013).

Accessing deep presencing requires mastering the paradoxical practice of embodying and abiding in stillness while in action

(Gunnlaugson & Reams, 2013). Sufficiently grounding one's self in stillness is helped by more traditional contemplative practices such as meditation (Cayer, 2005; Gunnlaugson, 2011; Senge and Wheatley, 2001), and perhaps even more by embodied awareness practices (Goldman Schuyler, 2010). To the extent that the generative dimension of deep presencing is driven by this underlying quality of dynamic yet still awareness, leaders discover a place within themselves to activate a seeing through past associations and reactions into sensing more directly into what is emerging through the present (Jironet & Stein, 2012).

During this process, insights, intuitions, and visions can emerge insofar as deep presencing work supports these creative openings or clearings for emergence. With ongoing practice, one becomes more confident and fluent with this process. Accessing deep presencing through stillness requires mastering the practice of embodying or contacting stillness in action and stillness in between action (Gunnlaugson & Reams, 2013). Meditation traditionally gives access to this ground of stillness, but in deep presencing, there is a need to learn how to access a creative perception through stillness in our relating, our knowing, and our conversations. On the whole, embodying stillness offers ontological renewal by giving us access to interior qualities of being (awareness, presence, equanimity, joy, and levity, among others).

Deep Presencing as a Means for Engaging Soul in Action

To extend deep presencing further, we now examine how a conception of self as soul can aid our understanding here. While the conception of self as soul goes back to Plato (1954, 1992), Socrates, and earlier, more recently Teilhard de Chardin (1955) pointed to an important distinction with his well-known quote: "We are not human beings having spiritual experiences, we are spiritual beings having human experiences" (cited in Covey, 2000, p. 47). These views place soul, as a spiritual being, as the

ontological ground of our existence (Reams, 1999), with human experience being something we have, not what we are. Here we explore ideas about the nature of soul and how we can see it act in the world, and how this can open new conceptual spaces for understanding presencing in particular, and leadership development in general.

We begin with a definition of “soul as a *creative unit of pure awareness*” (Reams, 2012, p. 104). Pure awareness is awareness independent of content, thus not tied to objects of attention. It is also independent of and prior to intellect, emotions, and physical body (Reams, 2007a). It is creative, in that it is dynamically unfolding into the world. Parker Palmer (2004) says that soul can be viewed as shy and requiring stillness to catch sight of, as well as being “tough and tenacious” (p. 58). He notes that we can name functions of soul even if we cannot reduce it to intellectual analysis: “The soul wants to keep us rooted in the ground of our own being, resisting the tendency of other faculties, like the intellect and ego, to uproot us from who we are” (p. 33). These activities point to the ways soul takes action in the world, as a counter to the tendencies of identification with the body, ego, or intellect. I (Jonathan) have direct experience from long-time practice of how this can bring greater coherence to perception and loosen the hold of conventional identifications.

Pursuing this idea further, David Bohm (1992) described a distinction between a creative sense of being, in contrast to our more traditional identified sense of being. He perceived identification with body, ego, or intellect as a fundamental blockage to achieving coherence in perception and action. An identified sense of being also has a more static nature, while our conception of soul is more dynamic. This dynamic nature is characterized in an ancient view that “*I don’t know what I am. What I am is unknown, but constantly revealing itself*” (Bohm, 1992, p. 167). Thus in relation to the creative component of the above definition of soul “the creative process of an unfolding sense of being can be seen as soul continually

revealing and coming to know itself in the actions of being in the world” (Reams, 2007b, p. 258).

Linking back to some of the language we quoted from Scharmer, Arthur Deikman’s (1996) work in psychiatry and religion around mystical states led him to make a relevant distinction between the “I” as being equal to awareness and the self: “This ‘I’ should be differentiated from the various aspects of the physical person and its mental contents which form the ‘self’” (p. 350). Deikman’s distinction between this I and the self (small s) can be contrasted with the previous quote from Scharmer (2000), talking about Self with a capital S, while also using the term *I* interchangeably. Michael Ray (2004) also describes the conception of self at the bottom of the U by using Self (with a capital S). Using the term *soul* can provide a simple clarification and avoid the confusion that can arise from the use of the terms *self* and *Self* or *I* to point to the essence of who and what we are. Thus for leaders, the presence of soul in action generates spaces that open “the spiritual, mental, emotional and physical area we and others have to work in” (Reams, 2012, p. 108).

There are a number of characteristics concerning the nature of how our presence as soul opens spaces. Here we briefly focus on two aspects of this in terms of integrity and construct aware consciousness. Integrity can be described as acting in alignment with our highest calling, the still, small voice of conscience, or the voice of soul. It is a kind of truthfulness, not as a noun but as a verb, a troth, (Palmer, 1993) or a living relationship to and unfolding of learning how to live in integrity with the truth of soul. Thus, having integrity can be conceived as an ongoing dynamic alignment of our human embodiment with soul.

To make this more tangible, we can turn to the psychophysiological links between our inner state and neurocardiology (McCraty, Atkinson, Tomasino, & Bradley, 2009). McCraty et al. use the term *coherence* to indicate tangible markers of this kind of integrity. This coherence functions in two directions. As

a psychophysiological state, it orchestrates improved functioning throughout the body, including cognitive performance (McCraty et al., 2009). It also enhances the heart's intuitive capacity (McCraty, Atkinson, & Bradley, 2004a, 2004b), including perceiving future events. This research has shown that the electromagnetic field generated by the heart can be measured up to ten feet outside the body. As such, we create a tangible space that others can perceive or sense through the modes of perception available in the heart.

From our current vantage point, psychophysiological coherence could be the function of the heart, which can be seen as the clearest indicator of soul in action in the world and generating these spaces. In terms of practices, McCraty et al. note that a combination of focusing attention on attitudes of appreciation, gratitude, and love with deep breathing enables us to access this coherence.

In terms of adult development and structures of consciousness (Kegan, 1994; Torbert & Associates, 2004), the dynamic unfolding of soul at the mental level can be seen as constructing meaning-making processes and the resulting structures these generate. In cognitive development literature, the term *construct aware consciousness* (Cook-Greuter, 1999) points to a postformal stage of ego development that is characterized by a transparency of these structures, or *aperspectival consciousness* (Gebser, 1985). In relation to leading processes in hypercomplex (or VUCA) situations, Reams and Caspari (2012) note, "The construct aware stage of development . . . enables a leader to be aware of constructs while they are happening. By the term constructs we basically mean the assumptions, ideas, lenses, projections and underlying mechanisms, both in detail and as whole systems. It is the ability to see how the participants of a process construct meaning individually and collectively and to respond to these" (p. 42). In this way, the intellect and mental structures are tools for soul taking action in the world. Being able to bring

soul's quality of awareness to these mental structures and the construction of perspectives can aid in suspending the images of the intellect and allow soul to come through and lead more authentically.

Applying Awareness Based Technologies

So how does the concept of soul in action, as developed through deep presencing and other methodologies, contribute to a practical, grounded, method for leadership development? Here we explore this question through the application of *awareness based technologies*, where the notion of soul in action functions more in the background as a foundation and grounding for how leadership development is undertaken.

The case presented here is a research project connected to the design and delivery of a leadership development program for a Norwegian multinational engineering and manufacturing company supplying offshore oil and gas equipment, Aker Solutions (Reams & Reams, 2013). We include a brief background on the program, describe the theory behind its design and some of the tools used, outline the research project, and share three key stories to illustrate how we see the awareness based approach contributing to the development of leadership skills in program participants.

In 2010 one of us (Jonathan) was approached by the head of Aker Solutions's learning academy about collaborating with them on the design of a new leadership development program. This arose out of an interest in having a dynamic, action research-oriented program, as well as the recognition that standard off-the-shelf programs would not be able to deliver the depth of leadership skills needed for this organization. An awareness based approach with a grounding in practice was proposed, and after an initial pilot run (Reams & Johannessen, 2011), the revised Develop Your Leadership program was accepted by senior management as the new training for midlevel managers.

The program design covers three modules (three, two, and two days) moving from a focus on leading self, to developing one's team, to developing and implementing strategy in the organization. Along with these three modules, participants receive eight coaching sessions that are based on program tools used for enhancing self-awareness. The theories informing the program all have a basis in cultivating and enabling awareness about participants' problems, both internal and external, so that as Kegan and Lahey (2009) say, they can "solve us" rather than being something to "be solved."

The opening work around defining leadership comes from Heifetz (1994; Heifetz, Grashow, & Linsky, 2009), and the subsequent work focuses on how to develop adaptive leadership capacities. This is approached from two modalities. One modality focuses on skill development of common challenges such as setting clear expectations, having conversations that require courage, developing their team members, and articulating purpose and vision for strategy. The other modality is the development of the being dimension of the participants by increasing their self-awareness. They receive 360-degree feedback in the form of the Leadership Circle Profile (Anderson, 2005), which assesses well-known and normed leadership competencies as well as reactive tendencies that limit leadership behaviors. This generates a kind of crucible or holding environment in which they are more open to self-reflection and inquiry (Reams & Fikse, 2010). From here, they are taken through the immunity-to-change process (Kegan & Lahey, 2009), which enables a deep dive into the systems of thought and assumptions operating to sustain their limiting behaviors.

All of this work is informed by a number of theories on constructivist adult developmental theory. Research by Kegan (1982, 1994), Torbert and Associates (2004), Cook-Greuter (1999), Joiner and Josephs (2007), and others describe stages of meaning making or structures of consciousness that become the implicit lenses through which we shape how much depth

and complexity of the world around and inside us we perceive. In this way, the methods, tools, and practices used are “technologies” that put awareness into application. While these applications focus explicitly on cognitive awareness, they also foster practices of deep presence in the form of getting “below the neck,” that is, in touch with bodily, emotional, and spiritual intelligences.

Research

Our quest to better understand how these awareness based technologies work in practice has led to ongoing research (Reams & Caspari, 2012; Reams & Fikse, 2010; Reams & Reams, 2013) in this area. The most recent project is a study of two cohorts of managers from Aker Solutions in Oslo and Houston. Detailed observation notes were made, totaling 386 pages and covering areas of the process of facilitation, participant dialogues and reflections, body language, tone of voice, energy in the room, the release of tension, frustrated expectations, as well as participants displaying impacts and the quality of presence and of listening.

Currently the analysis process is ongoing, and we are exploring how Fischer’s skill theory (Fischer, 1980; Fischer & Bidell, 2006) can contribute to a finely grained understanding of participants’ growth in cognitive development relevant for leadership skills. Fischer’s skill theory is a neo-Piagetian approach to cognitive development that also integrates elements of operant conditioning from behaviorism. A skill is defined as “a unit of behaviour composed of one or more sets” (Fischer, 1980, p. 482). Skills, whether physical, emotional, or thinking, develop as environmental conditions are encountered where a situation cannot be solved with existing cognitions, and various transformational processes move skills in micro- and macrosteps through the levels of set relations. These levels go through three tiers—sensory actions, representations, and abstractions—with each

tier made up of moves from a single set to mappings between sets, through systems of sets to systems of systems of sets, which become the next tier's single set.

Fischer's (1980) definition of *cognition* gives a broad understanding of the concept: "the process by which the organism exercises operant control . . . over sources of variation in its own behaviour. More specifically, a person can modulate or govern sources of variation in what he or she does or thinks" (p. 481). This dynamic view of skills from Fischer could tentatively be linked to our above-described sense of soul unfolding its being through choices in these sources of variation. This also means that we can move from a level of skill that is automatic, to one that is functional, and then, if conditions are right, to an optimal skill level. Finally, with the support of scaffolding, we can perform at an even higher level of skill. This is important for us in our understanding of how participants in this program are supported and how they demonstrate growth.

Stories

Here we depict sample narratives that illustrate how cultivating deep presence through awareness based technologies can look in real life. These stories come from three out of seven participants we tracked closely for this stage of analysis. The results as a whole showed a wide range of individual participant processes over time of going from total resistance to holistically and insightfully experiencing and tracking the aims and intentions of the program, leading to internalizing new patterns of behaviour. (Pseudonyms have been used.)

Espen from the Oslo Cohort

The first story is about Espen, a participant of the Oslo cohort who spoke up a lot and appeared quite self-confident. His main concern was that he was not delivering on tasks. In the

program, he was working with a particular issue about always providing an open door for his employees to come into his office with their problems. They did come to him, with the result that he was not finding the time to deliver on many of his own tasks.

Through the immunity-to-change process, he had created a metaphor where he described his employees as entering the office with monkeys on their back, then taking the monkeys off their back and giving them to Espen. He ended up with a zoo in the office that he had to tend.

He admitted that he somehow felt annoyed but that he still wanted the monkeys because it gave him a feeling of control. “Ja, it comes from me!” he said at one point, realizing that he had invited it in because he wanted that control.

Realization of his competing commitment gave rise to a disorienting dilemma and a fearful resistance to giving up the interdependent dynamic he had created. It took Espen time to let go of that control and an intense process to work himself through that and embody the alternatives. As soon as he saw his role in this dynamic, he started to take responsibility for his actions, make experiences and learn from them, and realize that his competing commitment to control maintained this interdependency.

In the last checkout of module 3, Espen shared parts of his process and one experience of how he had made a step in relation to his challenge: “I practiced with my team. We sat in a circle, and I said, ‘I cannot manage everything now.’ I made a list. Then I said, ‘I can help you with that one or that one.’ That was very good. For the first time I have the feeling I am delivering things.”

From our awareness based approach, we could imagine that a typical way to address such a problem would be to advise Espen on what to do to stop the interdependent cycle. With the awareness based approach from the immunity-to-change process, we simply allowed him to discover his competing commitments and enabled this awareness to grow over time (with the support of

coaching), so that he could self-author a solution from a more complex understanding of his internal dynamic.

Kris from Norway in the Houston Cohort

The next story illustrates a different stage of growth that was more subtle and at first harder to see. Kris is from Norway and was in the Houston cohort. As a Norwegian, Kris's attitudes, behaviors, and interventions were more humanistically shaped than the ones of his colleagues. He had quite a strong presence among his peers and often got people's attention. He displayed a good degree of systemic and complexity awareness. His ability to frame matters, articulate his abstract thought, and contextualize issues seemed to be appreciated in the group. He also used metaphorical language to frame issues he wanted to express. One major shift for Kris was that he talked about great changes during the program in his way of designing relationships at work and especially in his private life.

Deeper insights were often "wrapped." An example is a metaphor Kris used in the first module when the group talked about fixing problems through firefighting: "We are good firemen, but 80 percent of us are pyromaniacs." His systemic awareness allowed him to disentangle and realize patterns in the higher ranks of the organization. The firefighting is a company cultural reflex response to challenges of any kind, and he acknowledged his part in it.

After going through the ITC map, Kris displayed signs of moving to a higher level of cognition in a checkout: "It was a very good day. I am realizing more, and I am seeing from the outside and from the balcony. . . I have crazy assumptions. It is so abstract. I don't recognize myself anymore." When things had started to move for him, he lost his usual clear vision, and then his perception was not as tangible to him anymore, but he had turned to something beyond what he was used to. His attention

to his insight illustrated that his development was going deeper into his interior processes, making things appear subtler and, at this early stage, more abstract. This is a commonly observed phenomenon—that performance lowers as a person enters a new level of skill complexity.

In the third module, Kris came back to the metaphor and said: “We are all firefighters, and we are pyromaniacs. But there are two fires: a house and a bush in the garden. We fight the fire in the bush, and the house burns down.” Analyzing this statement in relation to his previous use of this metaphor, it appears that Kris had found an optimal level of cognitive operating (with some broad generalized scaffolding from participating in the program) where two systems, his use of metaphors and his systemic awareness, were now connected into a higher level of functioning.

Daniel from the Houston Cohort

Daniel was a younger participant from the Houston cohort. He appeared to be a prime example of a very concrete engineering mind and was outgoing, with strong opinions. His body language was often agile and attentive and also showed some resistance, disbelief, or doubt weighing in on specific situations. According to his body language and verbalized concerns, thinking below the neck seemed to be incompatible with his straight-forward engineering mind-set.

To give a reference point for the eventual shift in Daniel’s mind-set, one of his initial comments in the first module stood out and caused quite a stir. A conversation came up about the cultural differences between the headquarters in Norway and the business unit in the United States. Somebody had claimed that nobody in Norway would lose his or her job because of a mistake, while those in the United States were not protected in that way. Daniel was obviously triggered by this claim, which he

responded to eagerly with a physical presence and strong voice: “How do you get a high-performing team in Norway if you can’t fire them?” It is unnecessary to mention that the Norwegians present in the room took a deep breath and had their opinions about that statement. And they did. But that is another story.

One day in module 3, we observed Daniel starting a process of inquiry. He followed up a couple of comments as he shared that he was insecure about the “why” that is related to the purpose in working in the oil and gas industry. He added that “it is not like selling a car or a phone” and showed concerns about what differentiates it. After the participants had been shown an extract of a video of Martin Luther King Jr.’s “I Have a Dream” speech, Daniel emphasized King’s passion and that he “was not selling his vision because he believed in it. . . It is much easier to sell something that you believe in! Some people have that. I don’t have that!” Through statements like this, he showed signs of being strongly embedded in a limiting belief about his identity and skills.

His claim that he lacked passion was then a subject of collective inquiry where the holding environment, supportive energy in the room, and the facilitation scaffolded him to a place where he noticed an attraction to the notion of transformation of being that had been spoken about. Daniel continued to make statements like these: “Some people have that. I don’t have that,” or, “I am just not like that. It’s just not in me.” The context and manner in which he spoke gave us clues that in a way he wanted to disidentify with his own limiting beliefs. Clarifying the “why” about purpose was part of making the next step, activating some subtle awareness that had been at work in him during the program. He appeared to be getting tentatively below the neck, or into some more abstract reflections about his own process.

In the third module, the focus is on strategy, purpose, and vision. One of the exercises in the program is for the participants to create a purpose and vision statement for their business

area. First, they go into small groups of three to four and practice. Wandering around between the groups, Jonathan observed Daniel giving a flat, technical, and descriptive vision and purpose statement that did not motivate anybody in his group. Responding to that, Jonathan provided him with some personal coaching for him to rework his purpose and vision statement. In the next activity, all participants went back into the big circle where they could volunteer and share their statement. Mark, another one of the participants, presented his vision statement, which also sounded very rational and technical. Daniel responded instantly: “That sounds like a car sale to me. I am turned off these things by my own rationality.” Obviously this was a resistant kind of response, but it also implied an insight that displayed perspective taking on his own rationality when he saw that style in someone else.

Daniel then volunteered to present after Mark. The reworking he did earlier enabled Daniel to present a well-redefined purpose and vision statement. His use of more abstract concepts and below-the-neck motivational energy was noted by the other participants, who stated that he was now inspiring, more authentic, and speaking from the heart.

In Daniel’s case, we observed the beginnings of movement from a very concrete, technical focus where “soft” things like inspiration and reflection were latent at best. His at times resistant engagement in the process eventually led to a scaffolded opening into a reformulation of his vision and purpose statement that demonstrated greater cognitive abstraction and much improved below-the-neck motivational energy. Thus he displayed clear signs of operating at a higher level of cognition in two domains: abstract thinking and emotional intelligence. It is our hope that even though he required significant scaffolding to achieve this, it would enable his functional and optimal levels of skill to have a better chance of also moving up a level over time and with practice. Touching on our notion of soul, Daniel’s shift to a more

authentic, coming-from-the-heart presentation of his purpose and vision for work could be viewed as his having more soul in action.

Concluding Reflections

An earlier critique of Scharmer's Theory U (Reams, 2007b) pointed to how a "social consciousness often wants to 'save the world' from its fundamental flaws" (p. 258). In many leadership development approaches today, there is an emphasis on using good intentions, intellect, and willpower to change what are perceived as flawed behaviors. In contrast, the awareness based approach addresses leaders as embodying an innate perfection, allowing for the growth of awareness and a more coherent perception of what is to enable change to follow course more naturally. In this sense, our chapter clarifies the sense of Bill O'Brian's often quoted point that the interior condition of the intervener is critical for the success of interventions (in Scharmer, 2007). From this point of view, the feeling of needing to fix the world, or even one's self (as in needing to "develop" to a higher stage of cognition), can, without the requisite internal awareness we're advocating for, bring about subtle obstacles to enacting the more fundamental forms of change and development that many long for.

In this chapter, we have examined deep presencing, in the domains of self-awareness as well as through the lens of leadership skill development. We have introduced deep presencing as a way for engaging the leader's self as soul in the workplace. By exploring how soul is both the ground and source of awareness and deep presence, our view is that this work requires an integration of an inner quality of presence with skillful means for understanding how to create environments that facilitate a transformation in being, as well as in cognition and skill in action. In this sense, calls for authenticity in leadership can also be met through cultivating soul's presence.

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