THE QUEST...REDISCOVERING A SENSE OF SOUL: A PRACTICE-BASED APPROACH TO SPIRITUALITY IN LEADERSHIP AND MANAGEMENT

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Abstract:

This paper proposes a framework for nourishing leadership based on Heron's method living inquiry, and drawing upon *The Quest ... rediscovering a sense of soul*.

Good and effective leaders are deeply connected to their sense of who they are, what they are doing, with and for whom they are doing it and why. Their authority becomes associated with the quality of their 'self' and this involves developing wholeness, integration and connection. Spiritual vitality, in turn, grows from awareness of what nourishes and drains deeper significance in life.

Management is the art of directing the attention and energy of an organisation so that it effectively accomplishes its purpose. New demands on organisations, including accountability and contributing to the wider good, require new concepts of managerial effectiveness. The paper explores a new concept of managerial effectiveness: the 'quadruple bottom line' - organisations that take account of their economic, social and environmental impact and are aware of organisational meaning and values and spiritual vitality.

Today many people seek a holistic framework that brings coherence to both the personal and the collective dimensions of their spiritual life. What does it mean to live a 'spiritual life'? How can vitality and creativity be nourished in the lives of individuals and of organisations?

CONTEXT AND THEMES

We can observe an increasing interest in spirituality applied to the fields of leadership and management, for which the formation and spread of SLaM and similar networks is evidence. There appear to be three main strands generating this interest:

1. Individuals' perceptions of their spiritual needs are changing. Support for traditional pillars of authority has eroded, including that of churches and traditional religious life. As people continue to seek meaning and value they look to new sources, beyond the churches and traditional religious life, to find it.

2. There is growing disillusion with the profit-motive as the sole determinant of the meaning and value of work and organisations. There is a growing perception that the profit-motive at best marginalizes and, at worst, eclipses all other criteria of the role and value of organisations in the community.

3. Political, social and environmental crises are stimulating desire for a global renaissance. Leadership and management roles are affected by the search to enrich life in the workplace and organisations[1], and nurture and value human spirit.[2]

Consideration of questions of meaning and value are central to this paper. All three strands above imply that questions of meaning and value are associated with an increase in human and planetary well-being, especially where they generate a sense of meaning and value that the individual experiences as authentic and genuine. This paper considers meaning, value and the spiritual search based on the method of 'living inquiry'. The paper argues that for the outcomes of searching to be authentic and genuine for the individual they must be rooted in analysis and reflection on our own experience (section 1). It goes on to examine some new demands on leadership and management that this brings (section 2) and considers how leaders and managers can nourish spiritual vitality (section 3); this is illustrated with reference to *The Quest... Rediscovering A Sense Of Soul*. It speculates on tools for organisational life that may enable us to assess the potential for bringing meaning and value into the workplace and organisations (section 4). Finally, it considers the requirements for achieving greater coherence and alignment between the life of the individual and that of the organisation (section 5).

1. QUESTIONS OF MEANING AND VALUE

There are two concurrent forces motivating the search for meaning and value. Firstly, many individuals are questioning the meaning of spirituality in their personal lives, and seek to integrate the outcomes of this search by experiencing themselves as whole and integrated in work and organisational roles too. Secondly, at the global level there is a growing view that the world is in crisis and this further kindles interest in questions of meaning and value. Contemporary science is congruent with these shifts in view, increasingly conceptualising material reality as an interdependent, relational world. We cannot insulate ourselves from what happens elsewhere and thus meaning and value become prime determinants of the quality of action.

However, the phrase "meaning and value" is frequently undefined. From a philosophical perspective, Tarnas points out:

> "*Since evidence can be adduced and interpreted to corroborate a virtually limitless array of world views, the human challenge is to engage that world view or set of perspectives which brings forth the most valuable, life-enhancing consequences*"[3]

This view is a challenge to examine the meaning and value ascribed to ideals and actions. Aung San Suu Kyi, leader of the democracy movement in Burma and winner of the Nobel Peace Prize, echoes Tarnas, describing "learning as the process of absorbing those lessons of life that enable us to increase peace and happiness in our world".[4]

Zohar and Marshall address our search for meaning and value in the context of intelligence, extending Gardner's notion of multiple intelligence[5] and operationalise this through the capacity to choose actions that contribute to the wider good. They define our search for meaning and value as the need to:

> "*address and solve problems of meaning and value, the intelligence with which we can place our actions and our lives in a wider, richer, meaning-giving context, the intelligence with which we can assess that one course of action or one life-path is more meaningful than another.*"[6]

In Zohar and Marshall's analysis, indicators of this intelligence include:

- The capacity to be flexible (actively and spontaneously adaptive)

- A high degree of self-awareness

- A capacity to face and use suffering

- A capacity to face and transcend pain

- The quality of being inspired by vision and values

- A reluctance to cause unnecessary harm

- A tendency to see the connections between diverse things (being 'holistic')

- A marked tendency to ask 'Why' or 'What' questions and to seek fundamental answers

- Being what psychologists call 'field-independent' – possessing a facility for working against convention.

Zohar and Marshall imply that there is a human capacity that can be utilised and developed to help "bring forth the most valuable, life-enhancing consequences" through an ability to "assess that one course of action or one life-path is more meaningful than another." Such definitions, however, are aspirational and do not, of themselves, resolve questions relating to concrete everyday choices and decisions. The answers to such questions are primarily inner-directed, though their fruits may be outer-directed.

A sense of meaning and value do not necessarily develop in alignment with higher order or positive values. Questions of meaning and value are more likely to be imbued with aspiration where they are linked with a wider view, one which is not dominated by the agenda of any individual, the particular organisation or a narrow range of indicators. This fits with a contemporary and more general

understanding of spirituality –there is more to the wider reality than a narrow view of the self, that we are connected with each other and the whole, and that – for some – there is a transcendent causative or creative force that underpins everything. This contemporary understanding of spirituality is also associated with a search for meaning and value and a desire for human activity to have a laudable purpose.

Paul Lacey, Chair of Multidisciplinary Studies at Earlham College, USA, considers the nature of a spiritual life that is not constrained to religious formulation. He says that the aim of a spiritual life is:

> *"to be a life which aims to discover human wholeness, the integration of all aspects of our humanity – body, soul, mind, emotions – and the connection of the self to all of creation."*[7].

We can conclude that in this kind of spiritual life, meaning and value will be given to practices and decisions that embody wholeness, integration and connection. But how do we know what practices and decisions are conducive to wholeness, integration and connection? Lacey goes on to say.

> *"If I can speak with authority, it is of what nourishes my life and what drains it of spiritual vitality"*[8].

Thus, by implication, he argues that wholeness, integration and connection flow from our level of vitality. In terms of meaning and value, spiritual vitality will flow from a life that brings the individual a clear sense of purpose and fulfilment. As we become more aware of those things that nourish spiritual vitality and what drains it, we embody the wholeness, integration and connection from which we derive authenticity, and hence authority.

Reflection on spiritual vitality has been historically the territory of the religious traditions but today the field of spirituality has transcended these boundaries and many theories abound. Wilber has pioneered mapping the spectrum of human development as the unfolding of the self through the integration of matter, body, mind, soul and spirit[9]; this view has also been challenged, perhaps most effectively by Ferrer who deconstructs existing assumptions in transpersonal psychology connected with the perennial philosophy and advances a radically participatory and pluralistic understanding of spiritual realities, spiritual practices, and spiritual knowledge [10]. Lacey's definition of a spiritual life is less elaborate and founded upon an experiential approach to understanding that a spiritual life – contextualising meaning and value within wholeness, integration and connection – is one we must explore for ourselves as it is "a life which aims to discover human wholeness". It seems that today, in contrast to the past, there are few set or readily available answers. We have to find our own answers, and the actual process of exploration will lead us towards becoming more whole, more able to integrate all the aspects of our humanity and feel our connection to all of creation.

Lacey's approach is essentially a 'living inquiry', a form of action research in which our life is our research topic and we are both the observer and the actor in the research. Action research was developed theoretically by Peter Reason[11] and applied particularly to spiritual life in the work of John Heron[12]. Heron calls this 'living inquiry', based on intelligent self-direction and the participation of persons who "explore together their spiritual and subtle experiences and the relation of these to the rest of their lives….. making sense of it according to their own lights."[13] In practice, a 'living inquiry' is difficult to undertake without guidelines that focus the exploration, bringing consistency and shape whilst impacting minimally upon the individual's reflection and interpretation of experience. The living inquiry is, in fact, a journey of personal and spiritual discovery.

The questions below model this approach and may enable us to reflect on Lacey's definition of a spiritual life, and what, in our own experience gives meaning and value and either nourishes or drains spiritual vitality.[14] The questions draw on the approach of *The Quest...Rediscovering A Sense Of Soul*[15], an open learning course offering a neutral framework to help individuals shape their own living inquiry.

- What is 'a spiritual life' to you?

- How can you express this non-verbally – through drawing, a map/diagram, movement, colour, image, etc?

- What nourishes and sustains your spiritual life and what drains it?

- What guiding principles, values and sense of meaning enliven you?

- What actions, behaviours and core principles express this in your life?

- What beliefs, attitudes and values do you 'take-for-granted'?

- Do they enliven or deaden you?

- What changes do you feel you need to make?

- What specific steps will you take to bear witness to the change you desire?

Having embarked on an exploration of a spiritual life, this paper turns nest to applying such ideas, and developing a model of leadership and management that allows for the integration of such a life.

2. THE NEW DEMANDS OF LEADERSHIP AND MANAGEMENT

Leaders and managers hold much responsibility for determining meaning and value in their organisations. A model of leadership and management that addresses questions of meaning and value, and goes further in integrating a spiritual life underpinned by a living inquiry resonates with the objectives of SLaM, and seems more congruent than traditional models of leadership[16].

There may be numerous reasons for a person wishing to integrate a spiritual life into the role of leader or manager. Two principal themes are:
(i) Leaders and managers value their own spiritual life, and wish to express this in their work but without making it coercive upon those they lead, and
(ii) Those that see leadership itself having an intrinsic spiritual dimension.

In a model that prioritises meaning and value, the qualitative dimensions of leadership are critical; this is clearly shown in models of leadership developed by, amongst others, Covey[17] (principle-centred leadership), Greenleaf and Spears[18] (servant leadership), Senge[19] (systems level leadership) and Barrett[20] (values in organisations). Conventional leadership and management skills are no less important in these new models; whilst the skills are necessary they are not sufficient to bring forward leaders and managers with self-awareness and self-knowledge. If we follow Lacey's notion, then his definition of a life that nourishes spiritual vitality and might result in self-awareness and self- knowledge identifies key characteristics of wholeness, integration and connection; these qualities are both subjective and inner-directed. Inner-directed leaders and managers often embody spiritual vitality, and practise qualitative reflection on their sense of wholeness, integration and connection that differs from traditional leadership and management criteria.

Leadership that embodies spiritual vitality requires individuals with self-awareness and self-knowledge. Senge, for example, calls it personal mastery: the discipline of

> "*continually clarifying and deepening our personal vision, of focusing our energies, of developing patience, and of seeing reality objectively. It goes beyond competence and skills – although it involves them – it also goes beyond spiritual opening, although it involves spiritual growth*".[21]

This kind of spirituality in leadership will require ongoing critical reflection, review and personal inquiry that enables individuals to clarify and deepen the personal mastery that Senge identifies. Both Senge and Lacey suggest that leaders and managers with self-knowledge and self-awareness are more able to:
- be visionary – enabling an organisation to identify and create outcomes that are collectively desired;

- be creative and flexible – embracing new models and ways of working whilst discerning when they are appropriate, and

- embody vitality – representing and articulating the organisation's vision of itself as a whole so that individuals can fulfil their place within it, and

- work with change whether or not such change is within her/his 'comfort zone', able to integrate such change so that development takes place.[22]

In addition, such leaders need to be sensitive to those with, and for whom, they lead and manage. In Western cultures, more traditional forms of community based on neighbourhood or church are in decline; research confirms that work and organisations are "our most significant community, replacing institutions like the church where many seek to find meaning and a purpose to our lives and a sense of being part of a bigger whole" [23]. Individuals may only be able to find this meaning if organisations have a clear sense of the meaning of the organisation (wholeness), understand and live its values (integration), define and perform a benevolent role in the world (connection). Senge, again, says:

> "When you ask people about what it is like being part of a great team, what is most striking is the meaningfulness of the experience. People talk about being part of something larger than them, of being connected, of being generative. It becomes quite clear that, for many, their experiences as part of truly great teams stand out as singular periods of life lived to the fullest. Some spend the rest of their lives looking for ways to recapture that spirit." [24]

In a similar vein, Van Gogh's landlady/lover in Nicholas Wright's play *Vincent in Brixton* (1988) says, "All I ever wanted was to be part of something remarkable" [25]. This remark potently captures the common and heart-felt desire for life to have meaning.

For co-workers to make meaning of their work, organisations must also make collective meaning of their work (the paper returns later to coherence between personal and collective dimensions of spirituality). Moreover, the value of an organisation in society is not confined to its financial performance, but includes its governance and exercise of social and environmental responsibility.

If we conceptualise organisations as 'persons' or entities, we can speculate that they also benefit from an organisational variant of wholeness, integration and connection. Recognising potential reciprocity between organisations and society sets organisations on a path towards "broad, integrated, whole-system, deep design/redesign approaches, grounded in our understanding of nature, ecology, psychology and culture." [26] Professor Stuart Hill, at the University of Western Sydney, emphasises praxis – informed, committed action, taken by both individuals and organisations, which shapes and changes the world:

> "I believe that the key is for each of us to individually and collectively start to think and initiate conversations about what such a transformed society and lifestyle might be like in a truly ecologically, culturally and personally sustainable society -- and then gain the knowledge and skills and prioritise our actions to bring this about…. We are at this time, I believe, at a critical threshold, and it will only be by our unwillingness to any longer go along with what, deep down, we know is unjust, uncaring and unsustainable, and choose the opposite path, that we will be able to turn things around… Further sustainable change will be achieved largely not through mega-projects, but by each of us individually and in small mutually supportive and collaborative groups, taking small meaningful, locally relevant actions, and sharing the processes involved, and publicly celebrating the outcomes, to make them available to others thereby making such 'healthy' approaches contagious… A group as small as this – if truly committed to such action – can play a major role in this process of cultural transformation." [27]

This praxis is dependent upon what Schon called *reflection-in-action* and *reflection-on-action* [28]. It presupposes that leaders and managers can draw upon a well of commitment and inspiration that nourishes their spiritual vitality.

3. NOURISHING SPIRITUAL VITALITY IN LEADERSHIP AND MANAGEMENT

The terms leadership and management conventionally denote a functional or operational competence. But there have long been parallel concepts that are more aspirational and transformational. Leaders, such as Cadbury and Rowntree – early Quaker businessmen – stood out because their spiritual life led them to a qualitatively different way of dealing honestly and truthfully with customers. Research on training undertaken by managers and leaders shows that "a significant number of management development courses rely on spiritual philosophies; they involve a search for meaning and purpose through exploration of the inner self." [29] Greater self-awareness and self-knowledge, already referred to, are desired outcomes of exploring the inner self. This directs our attention towards our quality of 'self' as central to leadership and management.

Clarifying our perception of 'self' requires self-exploration of both of our journey and our beliefs. Heron offers a starting point: "the distinctness of a person is to do with him or her being one unique focus"[30]. Exploration must take into account, however, that the concept of self is itself problematic and dependent upon cultural and other constructs[31]. It may bear most fruit to reflect critically upon our individual perception of 'self' through models that have demonstrated enduring utility in the field e.g. Abraham Maslow, Frances Vaughan, Roberto Assagioli. [32]. However, self-awareness and self-knowledge do not necessarily protect the individual from stress. Evelyn Underhill, echoed by Lacey, points out that the round of external activities exacts "a constant drain on your spiritual resources, which you simply must make good" Underhill continues:

> "*This being so, it does become immensely important, doesn't it, for you to have a clear view of your own spiritual position and needs, a clear idea of the essentials of your situation; and to plot out the time which you have at your own disposal as well as you possibly can?*"[33]

Underhill's further supports the need for a living inquiry if we are to develop the clear view she sets out. This search is not new but has a particular flavour at this time. Thomas Berry wrote, "It's all a question of story. We are in trouble now because we do not have a good story. We are in between stories. The old story, the account of how we fit into it, is no longer effective. Yet we have not learned the new story."[34] People living 'between stories' frequently experience confusion, their values are challenged, and there is a loss of purpose and sense of meaning. *The Quest...Rediscovering A Sense Of Soul*, of which I am Editor, provides one example of a course, based on living inquiry, which is designed to help individuals address the all too common contemporary experience of confusion, challenge to their values, loss of purpose and sense of meaning – in short to facilitate our learning of a new story.

The Quest...Rediscovering A Sense Of Soul

The Quest is helps address the drain identified by Underhill, enabling people to explore their "spiritual position" and become more aware of "the essentials of their situation". *The Quest* offers a learning framework to guide a living inquiry and build spiritual reflection. The intention of *The Quest* is to support the contemporary search for an authentic sense of spirit and desire for wholeness, integration and connection.

The Quest is a self-directed process that enables the individual to explore spiritual, personal, emotional and ethical questions. As an open learning course it allows for maximum flexibility in the ways and places it can be used. It was written independently, and self-published in partnership with the Findhorn Foundation, a non-denominational spiritual community founded over forty years ago and situated in north-east Scotland[35]. The aim of *The Quest* is to provide a neutral, i.e. non-denominational, non-sectarian, framework for personal and spiritual discovery, focussed through numerous and wide ranging reflective exercises that stimulate the user to explore and clarify their own answers. The narrative and reflective exercises hold an open space that guide the individual's living inquiry whilst minimising the influence of the material itself on the outcome of their exploration.

The course was written by a team, sharing their personal and spiritual journeys in a way that valued individual experiences. The writers experienced a sense of connection that, alongside critical reflection, enabled them collectively to identify key and common concerns. Wholeness was embodied through writing as a group process, with each member of the group thinking on behalf of all and relinquishing attachment to their own contribution. Following critical peer review of a draft, the team met intensively. They learnt that rational review and critique gave way to a period of chaos and uncertainty from which creativity and fresh vitality emerged; this willingness to embrace chaos enabled the integration of different elements and perspectives.[36] A pilot version was produced and field-tested for 6 months prior to a final round of revisions. This way of working may be seen to mirror Lacey's definition of a spiritual life emphasising wholeness, integration and connection.
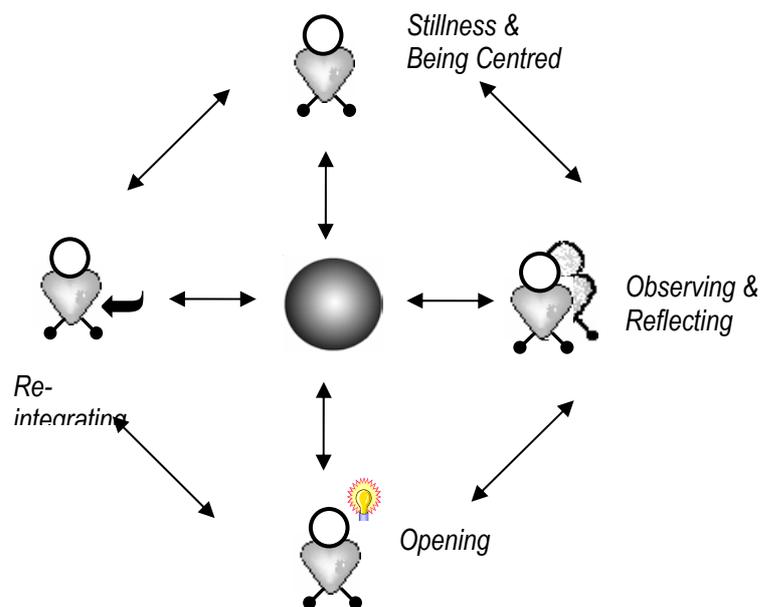
The Quest Framework

The Quest framework has two core premises: that there is a dimension of 'something-more', that *The Quest* calls 'Spirit', that "connects everything together and yet is far greater than any part of it"[37], and the

intention "to provide conditions within which, in liberty, persons can determine their own true nature and interests in co-operation with others similarly engaged."[38]

The Quest prioritises experiential learning – "learning that occurs as a direct participation in the events of life"[39] based on evidence that adults learn by making meaning of their experiences[40]; that this learning is enriched where learning takes place in communication and dialogue with others[41]. However, learning may be ineffectual, or not take place at all, unless experience is observed, reflected upon, reviewed and integrated; Schon, in his seminal work, identified the need for effective practitioners to reflect both *in action* as well as *on action*[42].

The Quest framework for such learning is based on the method of living inquiry (see diagram below). *The Quest* draws upon Kolb's experiential learning cycle[43], adapting it in the light of critical review of our own learning history and the context of personal and spiritual inquiry. This constitutes the strand of *The Quest* that provides for *reflection-in-action*.

Stillness & Being Centred

Observing & Reflecting

Re-integrating

Opening

<u>*The Quest* Framework</u> © The Quest Partnership 2001

(i) *The Quest* framework predicates learning as a process characterised by multi-directional rather than uni-directional flows of the building blocks of learning (see arrows). For learning to take place, however, it is essential that all such elements occur on a regular basis.

(ii) Learning is operationalised by learning tools, for example, critical incident analysis, that translate experience into learning. In the context of personal and spiritual enquiry, *The Quest* makes less use of conventional learning tools i.e. rational, analytical skills, and prioritises practices for spiritual reflection to focus attention on the development of skills neglected in conventional learning environments. The practices of spiritual reflection, therefore, include finding inner stillness, working with intuition and working with values.

(iii) In *The Quest* framework a fifth element is added – *soul* (the sphere in the centre of the diagram), to point to 'our essence, an inner core that holds our potential and wholeness central organising and integrating principle'[44], a pathway informing and informed by higher-order values and aspirations. Placing the *soul* 'our central organising and integrating principle' at the centre of *The Quest* framework, gives a reference point of *connection with the sacred*.

The Quest framework supports the *reflection-<u>in</u>-action* through:

- *Stillness and Being Centred* – practices that focus on being present, e.g. *Finding Inner Stillness* and *Attuning*

- *Observing and Reflecting* - practices that focus on being aware e.g. *Being Your Own Observer*

- *Opening* - practices that focus on seeking meaning, values and inspiration e.g. *Using Intuition*
- *Re-Integrating* - practices that focus on a sense of being alive that is integrated in living e.g. *Meaningful Action*

Within *The Quest* '*reflection-on-action*' is pursued through four themes, each with its own chapter: *Exploring Me* – reviewing and reflecting on our journey; *Changing Faces of Faith* – the formation of our spiritual belief and interpretation of our experience; *What Changes?* – dealing with change, and *Living in a Sacred Way* – re-integrating learning into life. The research material for this '*reflection-on-action*' is found:

> "*in your own life, relationships, interests, qualities, beliefs, passions and difficulties…. Calling The Quest a living inquiry is also a reminder that it is not an abstract study but is much more about awakening or awareness….. Ultimately you seek a more conscious connection with your experience of spirituality and your soul by asking: What is it that I can see and know directly for myself?*"[45]

A valuable dimension of the contemporary spiritual search is the need for connection with others, met when working through *The Quest* in a group in a spirit of co-operative inquiry[46], attuning to the natural world and developing an inner life grounded in connection to the sacred.

Connection with others – in a group, with a friend, through web-based discussion – is vital. Our sense of self and frame of reference are formed in exchange with others. We receive the support of being heard and encouraged on our own journey and reciprocate this support to others, whilst continuously opening our interpretation of experience to the 'reality check' of dialogue with others.

However, inter-personal connection alone is not enough. We also require times when we pay attention to the physical and material environment, allowing ourselves to develop a sense of connection with nature and the earth. The purpose of spiritual practice, in all traditions, is to assign time to developing a connection with the sacred. Connection with the sacred, however, is not just a separate activity, divorced from other activity; most spiritual traditions attach importance to setting aside regular periods when one gives exclusive attention to connection with the sacred, building, if you like, the 'muscles' that enable ongoing connection.

The Quest, therefore, provides an example of living inquiry, one that is directed towards a life that nourishes spiritual vitality and helps us develop wholeness, integration and connection.

4. TOOLS TO DEVELOP MEANING AND VALUE IN ORGANISATIONS

Management is a key to bringing meaning and value into the workplace and organisations. This paper uses a working definition of management as the art of directing the attention and energy of an organisation so that it effectively accomplishes its purpose. Organisations grappling with new demands and concepts of purpose, including accountability and contributing to the wider good, require new concepts of managerial effectiveness. Increasingly, governments look towards business organisations to help address issues of inclusion, inequality, health and sustainability and professional institutes are beginning to amass evidence that corporate responsiveness and competitiveness go together[47]. To survive and thrive organisations need to be aware of their values and to demonstrate wholeness, integration and connection.

Values, taken to mean those things that "live in the heart and reflect what matters most to us" (Marks, 1989)[48], are significant in defining a sense of identity both for persons and for organisations. Business consultant Yazdi Bankwala, says, "This is the age of consumerism and globalisation. Imagery and emotion play important roles. In understanding human behaviour, both IQ (Intelligence Quotient) and EQ (Emotional Intelligence) are important, but even more important is VQ, or what is known as Values Quotient. Many of us have yet to make the connection between what we value and our behaviour…. The shift today is towards the age of consciousness, where we will be made more aware of our choices and their consequences."[49]

Barrett is one among a number of researchers who find evidence those organisations that are clear about their values and consistent in applying them have a competitive edge in today's business environment[50]. Barrett researched the relationship between the performance of companies and their values, establishing a connection between corporate success and corporate values. He says,

> *"People will be seeking to work in organisations that allow them to bring their personal values to work, that give them an opportunity to make a positive difference in the world, and allow them to become all they can be – to fulfil their potential."*

Specifically, they will seek companies that demonstrate

> *"the values that break down separation and create connectedness: responsibility for the whole, importance of the common good, equality, respect for all life, and unconditional caring."*[51]

Wholeness, integration and *connection* are key attributes to the capacity to lead and manage from a different perspective: 'thinking-outside-the box', willingness to be stretched by that which is new, difficult, unknown or uncomfortable and to respond with a sense of being enlivened by this. In recent years, numerous companies have begun to employ 'triple bottom line accounting'[52] to measure their performance against a 'triple bottom line' that includes social and environmental factors as well as financial ones[53]. These new measurements of corporate health inevitably engage organisational creativity and flexibility – the capacity to re-think and re-vision the role and nature of an organisation in a context of interest wider than shareholder value. Organisations are increasingly likely to need to find ways to thrive on the edge of chaos, work amidst uncertainty, generating co-operative and collaborative approaches – all of which require considerable creativity and flexibility.

Maroochy Shire Council (Qld, Australia), for example, has adopted Triple Bottom Line (TBL) reporting, "the process of identifying, assessing and reporting business activities in terms of their impact on society, the environment and economic sustainability." As a rationale for adopting TBL reporting, they say

> *"Local government exists to sustain the environment, to look after our communities, and to encourage the economic well-being of our citizens. For local government, the Triple Bottom Line is core business."*

In their review of the practical problems of using TBL, the Council see a difficulty in

> *"how to bring the "three bottom lines" together in an integrated way. Improving one "bottom line" may cause the other two to deteriorate. This transition from the 'hard' financial measures to the 'softer' measures will require a significant change in corporate culture, values, and decision-making processes."*

Maroochy Council identified measurable indicators in aspects of economic, social and environmental impact, in addition to conventional financial ones. This is a significant shift in the meaning and value that an organisation attaches to its wider responsibilities, impact on society and the environment. The Council says "These are the criteria (bottom lines) by which our performance will ultimately be judged, both by ourselves, and by others."[54] (see examples of the Shire Councils Report Cards next page)

Building New Indicators

The spreading use by companies of 'the triple bottom line' reporting is a useful framework in which to explore wider considerations of corporate responsibility. But it does not directly lead us to the questions we began with: meaning and values and wholeness, integration and connection flowing from spiritual vitality.

There is a growing body of research and practical work being done to test strategies developing organisational meaning and values. One of the most comprehensive is spiral dynamics; spiral dynamics collates value sets (v-memes) or world views that shape unfolding human consciousness and helps understand why and how large-scale systems can change, and evaluate their open-ness to change[55]. Barrett, who started a Forum for Values for staff when he worked at the World Bank, has worked extensively with organisations for many years, helping them to develop a sense of meaning and values that support them in visionary growth and lead towards a progressive unfolding of a rounded and effective organisation. He identifies five key values, values that are congruent with the wholeness, integration and connection on which this paper has focussed: "responsibility for the whole, importance of the common good, equality, respect for all life, and unconditional caring."[56]

We can speculate about how Barrett's five values might be applied in a way similar to TBL reporting (although it should be noted that Barrett, in his work with organisations, has developed his own battery of techniques for measuring and applying values). When Maroochy Council developed their economic, social and environmental Report Cards, they identified five indicators for each card that related to the council's core objectives yet provide a sensitive indicator of its performance in pursuit of economic, social and environmental impact. Following the same process we might speculate on five indicators, each of which is sensitive to one of Barrett's values and may provide a sensitive indicator of an organisation's sense of meaning and value and spiritual vitality. Clearly this is speculative and much work would be required to identify indicators of measurable criteria that are valid in their own right and do not just replicate measures on the other Report Cards; my intention here is simply to stimulate further questions for others to pursue.

- **Values criteria: responsibility for the whole**. Relates to core concern of Maroochy Shire Council for ensuring the financial success and viability of Council. Values Indicator: monitoring performance against budget and performance against preferences of inhabitants of Shire Council area.

- **Values criteria: importance of the common good** Relates to core concern of Maroochy Shire Council for supporting the sustainable development of the regional economy and improving the Shire's infrastructure. Values Indicator: mapping improvements relative to population and land area.

- **Values criteria:** equality. Relates to core concern of Maroochy Shire Council for building vibrant communities and improving the quality and value of services. Values Indicator: monitoring uptake of services against targets for both key and marginal groups.

- **Values criteria:** respect for all life. Relates to core concern of Maroochy Shire Council for protecting and enhancing the Shire's natural and built environments. Values Indicator: mapping diversity of species of flora and fauna in selected urban and rural areas.

- **Values criteria:** unconditional (or inclusive) caring. Relates to core concern of Maroochy Shire Council to enhance the quality of life of the people of the Shire. Indicator: monitoring provision of networking facilities between local areas and groups to break down isolation and encourage community.

Organisations, such as Maroochy Shire Council, are already enabling the wider community to see coherence between individual and organisational meaning and values. Senge identifies such organisations as 'learning organisations': "… organizations where people continually expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspiration is set free, and where people are continually learning to see the whole together. [57]. Progress has been made but far more needs to be done to develop organisations to ask the kind of questions that prise open the meaning and values that organisations currently operate, whether this is explicit or implicit. Such questions might include:

- Does the organisation value its stakeholders and, in particular, work towards enabling co-workers to realise their potential?

- Does the organisation create space for dialogues of purpose and meaning, of contribution and why we are here?

- What values does the organisation aspire to and what processes allow it to be open to hearing what values its stakeholders see it demonstrating?

- Does the organisation pay attention to what animates and enlivens it and its members and pay attention to hearing and acting upon those things that stop this?

- Does the organisation act in ways that acknowledge, embrace and enhance the presence of something more than the physical here and now, beyond that which we can perceive with out sense of touch, taster, smell, sight and hearing

- Is the culture of the organisation open re-inventing itself and has it mechanisms for establishing the degree of change that is required? 58
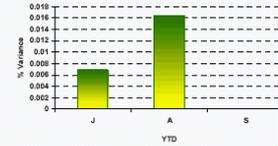
CORPORATE FINANCIAL REPORT CARD   AUGUST 2002

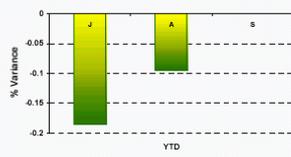## TOTAL COUNCIL

Operating Revenue vs Budget % Variance

Danger	Act Now	Watch	On track	In front

42.6% of full year budget earned

General Operating Costs vs Budget % Variance

Danger	Act Now	Watch	On track	In front

13.7% of full year budget spent

Capital Expenditure vs Budget % Variance
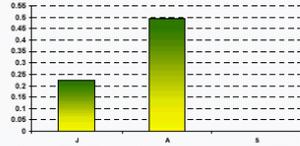
Danger	Act Now	Watch	On track	In front

11.2% of full year budget spent

Cash Position
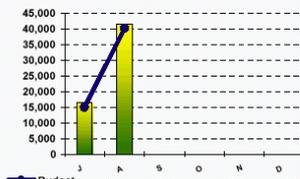
Danger	Act Now	Watch	On track	In front

Employee Costs vs Budget % Variance
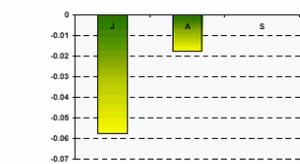
Danger	Act Now	Watch	On track	In front

16.8% of full year budget spent

SOCIAL REPORT CARD   AUGUST 2002

TOTAL COUNCIL

Employee Safety
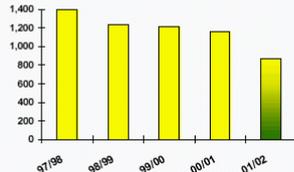
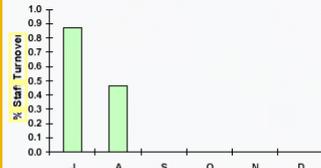| Danger	Act Now	Watch	On track	In front

The total number of days lost from injury for the year ended 30 June 2002 was 867. This represents a decrease of 38% on the 1997/98 year.
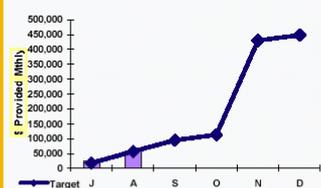
Workforce Stability

Danger	Act Now	Watch	On track	In front

The staff turnover rate was less .5 of 1% for the month of August 2002.

Community Support

Danger	Act Now	Watch	On track	In front

The donations and subsidies provided to community groups at the end of August was just over $57,000 which is 1.2% above the target.
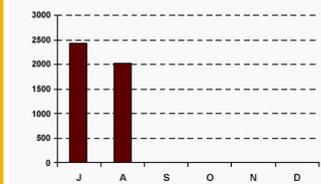
Listening to the Community
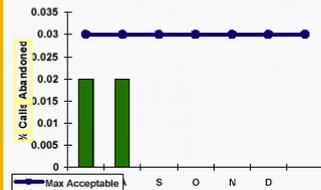
Danger	Act Now	Watch	On track	In front

The number of abandoned telephone calls to our call centre during August 2002 was 2% which is comfortably under the allowable figure of 3%.

Community Works Provided

Danger	Act Now	Watch	On track	In front

Approx $4.5 million of community related capital works have been undertaken this financial year.

ENVIRONMENT REPORT CARD   AUGUST 2002
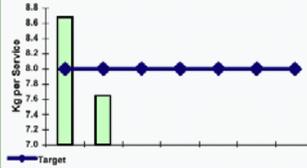
TOTAL COUNCIL

Waste Water Purity
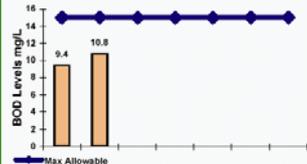
Danger	Act Now	Watch	On track	In front

Organic matter levels in wastewater have been within allowable standards for July & August

Recycled Solid Waste

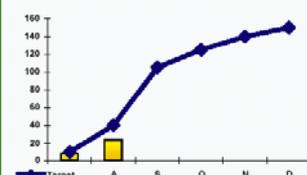| Danger	Act Now	Watch	On track	In front

There was 7.6 kg of recycled solid waste collected per service during August 2002 which is less than our target of 8kg for the month but the average for the two months to date is 8.15 kgs.
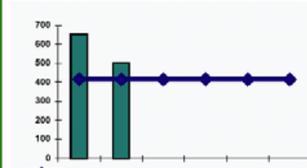
Roadside Weed Control

Danger	Act Now	Watch	On track	In front

The actual is slightly less than the target at the end of August but a better indication will be available at the end of September.

Volunteers Working on Conservation Projects

Danger	Act Now	Watch	On track	In front

A targeted increase of 10% (415) has been set for this year. Actual figures are above the target at the end of August.

5. BRINGING COHERENCE TO THE PERSONAL AND ORGANISATIONAL DIMENSIONS OF LIFE

Earlier in the paper, I suggested that individuals pursuing their own search for meaning and value seek to apply their sense of meaning and values at work. Bringing spirituality into work and organisations indicates a desire to develop greater coherence between the personal and collective arenas of life. How might we expect coherence, or absence of it, to manifest?

Lack of coherence may be indicated by confusion, lack of purpose and sense of meaning, stagnation and disaffection. Inner conflict has a deadening effect upon us. Greater coherence, by contrast, may be indicated by feelings such as 'wholeness', balance, well-being, harmony, 'flow' and energy – freeing creativity and vitality. In psychosynthesis, the ultimate aim of self-development is 'synthesis' – realisation of the "Self, of that place within where opposites are reconciled and all possibilities coexist without mutual contradiction."[59] Coherence between the personal and collective emphasises what Boucouvalas calls 'homonomy': "homonomy is 'the experience of being part of meaningful wholes and in harmony with superindividual units such as family, social group, culture and cosmic order"[60]. These perspectives on coherence are similar to Lacey's identification of wholeness, integration and connection and our capacity to know what nourishes this spiritual vitality.

As individuals, one of the ways in which we register congruence is when our individual sense of meaning, our values and our actions are consistent – intra-personal congruence. We can also experience congruence when the values of an organisation with which we are connected are congruent with our personal values. When we enter an organization with values similar to our own the values are in alignment. When the values are different, there is a values misalignment. Such misalignments, are likely to sap our creativity and vitality.

A first step is to become more aware of one's personal level of creativity and vitality. One simple check-in at the end of the day is to ask your self:

- When today have I felt enlivened or deadened?

- What was the situations, events, places etc, at the time?

- What triggered my creativity and vitality and what sapped me?

At work or as part of an organisation we may ask:

- When do I feel fulfilled and fully engaged in what I am doing?

- To what extent do I feel that I am able to make a useful and valued contribution?

- Do I feel that my values and principles are in harmony with the organisation or do I feel that I am participating in situations that cause me inner discomfort?

Such questions help alert us and our organisations to that which brings a sense of meaning and to those things we value. It also opens us to change. Professor Stuart Hill, a formative influence in the founding of SLaM, is a profoundly influential figure in developing the case for, and action to bring about, change that is deeply spiritual, promoting wholeness, integration and connection. He says:

> "*We are at this time, I believe, at a critical threshold, and it will only be by our unwillingness to any longer go along with what, deep down, we know is unjust, uncaring and unsustainable, and choose the opposite path, that we will be able to turn things around ..... I believe that the key is for each of us to individually and collectively start to think and initiate conversations about what such a transformed society and lifestyle might be like in a truly ecologically, culturally and personally sustainable society -- and then gain the knowledge and skills and prioritise our actions to bring this about*" and requiring an organisation "*that tests its policies and actions against the values of social justice and cultural diversity, ecological sustainability, and nurturing personal development, mutually supportive relationships, community spirit and well-being*"[61]

We may still question, however, the need for change. Are we convinced that the quest for spiritual vitality, for wholeness, integration and connection, matters to each of us sufficiently? I put this view to Robin Alfred, one of the directors of the Findhorn Foundation Consultancy. He replied:

> "*It only matters if we think that the planet matters, that beauty, joy, meaning, interconnection, love, and compassion matter, that being open to potential matters, that becoming and being more conscious about work, relationships and the natural world matter for ourselves and for the next seven generations and that to lead a spiritual life is significant.*"

For information about *The Quest...Rediscovering A Sense Of Soul* and The Quest Project:
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[1] Throughout this paper I use 'organisations' to cover a wide range of enterprises where people work and give voluntary service, whether in the private or public sector.

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