

A Historiographical Analysis of Integral Coaching

A Research Report
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by
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9 December 2011

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Mark Hartnady

Cape Town, December 9, 2011

Abstract

This research report uses the historiographical method to investigate the development and evolution of Integral Coaching – a fast-growing method of professional coaching that lacks a clear documented history. The purpose of this report is to provide such a documented history.

Through the narrative analysis of group discussions and expert interviews, the researcher sets out to capture the events, themes and ideas of thought-leaders that informed the development of the discipline. The researcher uses this data to create a documented model of understanding that is comprehensible to organisations or individuals interested in Integral Coaching but lacking knowledge about the discipline.

The researcher finds that the key influencers that informed Integral Coaching are rooted in (1) the anti-intellectual experiential movements which occurred during the Human Potential Movement in California in the 1960s-70s, (2) a wellspring of intellectual works during the 1970s-80s by various scientists, philosophers, theorists and psychologists on language, cognition & perception and (3) the work done since the 1980's by James Flaherty (and other faculty of New Ventures West) to formalise Integral Coaching using processes and models for coaches derived from experiential knowledge that incorporates both Western and Eastern theories and philosophies.

Research Type/Method: Inductive qualitative (historiography and narrative analysis).

Purpose/Originality/Value: This report will benefit organisations and individuals interested in learning about this particular style of coaching that has an established history and is grounded in academic theory.

Keywords: Coaching; History; Coaching History; Integral; Historiography; New Ventures West; Phenomenology; Existentialism; Structure; Interpretation; Autopoiesis; Cognition; Speech Act; Language; Linguistics; Conversations; Competence; Human; Domains; Streams of Competence; Way of Being.

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Glossary of Terms

<i>ACC:</i>	Associate Coaching Course (six month coaching course).
<i>Autopoiesis:</i>	A term coined by biologist Humberto Maturana. A system is autopoietic when (i) through its interactions and transformations, it continuously regenerates and realises the network of relationships that produced them; (ii) it constitutes a concrete unity in space in which the systems components exist by specifying the topological domain of its realization as such a network.
<i>CFC:</i>	Centre for Coaching (South African accredited coaching institution licensed under NVW, in academic collaboration with the Graduate School of Business, UCT).
<i>CTE:</i>	Coaching to Excellence (2-day coaching course).
<i>Dasein:</i>	A German term coined by existentialist philosopher Martin Heidegger which can loosely be understood in English as “being” in its ontological and philosophical sense.
<i>Existentialism:</i>	A philosophical attitude associated especially with Martin Heidegger and Jean-Paul Sartre, opposed to rationalism and empiricism, which stresses the individual's unique position as a self-determining agent responsible for the authenticity of his or her choices.
<i>Hermeneutics:</i>	The science of interpretation.
<i>Holon:</i>	Something that is simultaneously a whole and a part.
<i>NVW:</i>	New Ventures West (first company to offer Integral Coaching courses)
<i>Ontology:</i>	The branch of metaphysics in philosophy that studies the nature of existence or being as such.
<i>PCC:</i>	Professional Coaching Course (1 year professional coaching certification)
<i>Phenomenology:</i>	The system of Husserl and his followers stressing the description of objects of experience in awareness. Phenomenology studies things constructed from the mind as distinguished from things in as of themselves independent of any conscious experience of them.
<i>Pragmatism:</i>	A philosophical movement stressing practical consequences as constituting the essential criterion in determining meaning, truth, or value.
<i>Rolfing:</i>	A practice whose primary emphasis is structural alignment and integration of the body in the field of gravity.
<i>Sitting:</i>	See “Zazen”.
<i>Speech Act:</i>	A technical term in linguistics and the philosophy of language which includes such acts as promising, ordering, greeting, warning, inviting and congratulating.
<i>Zazen:</i>	Deep meditation undertaken whilst sitting upright with legs crossed.

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1. Introduction

The term “coach” derives etymologically from a medium of transport that traces its origins to the Hungarian word *kocsi* meaning “carriage” that was named after the village where it was first made (coach, n.d.). Coaching has been used in language to describe the process used to transport people from where they are, to where they want to be. It is in this context that Flores (2011) describes the coach as facilitating the process of moving the coachee without deciding the way forward. Although traditionally associated with sports, coaching has in recent years taken various professional avenues into (but not limited to) executive leadership, career guidance, conflict management and life management.

Integral Coaching (hereinafter referred to as “IC”) is an overarching coaching discipline that offers a methodology for clients to get to where they want to be by the coach facilitating self-generating sustainable competence in the coachee through conversation, regardless of vocation. It is a specific discipline, intended for application into all spheres of life, which works to raise awareness in the coachee of the mechanisms that may be hindering the realisation of certain goals based on the coachee’s own perspectives and interpretations of the world (Flaherty, 2005).

Csikszentmihalyi (2003, p.101) states:

If management views workers not as valuable, unique individuals but as tools to be discarded when no longer needed, then employees will also regard the firm as nothing more than a machine for issuing paychecks, with no other value or meaning. Under such conditions it is difficult to do a good job, let alone to enjoy one’s work.

Despite the observed effectiveness of the discipline of IC (Yodaiken, 2009; Howard & Loos, 2005), little literature exists to explain its origins and how it emerged or to explain its perceived effectiveness as a coaching method. Without fully understanding the full series of events, themes and people that influenced the development of the discipline, there does not exist a robust pool of evidence to validate its effect in achieving desired results.

The purpose of this paper is to interrogate the institutional memory of the discipline. The researcher aims to provide depth of meaning to the theory of IC by examining its

development through the narrative of history as recalled by its theorists and practitioners, and to capture the emerging themes in a model of understanding that may allow future generations of researchers to work with a well-formulated and contained theory for further testing.

1.1. Research Area and Problem

1.1.1. Domain of Research

The specific domain of research is coaching, and how concepts of philosophy, psychology and spirituality with an integral approach can be applied to facilitate long-term capacity development. The reasons for choosing to focus on this area are explained through the narrative of the problem.

1.1.2. Problem Description and Relevance

Like other social phenomena, IC exists not because it has been willed into being. Rather, historical and cultural circumstances have given rise to it. It is the creative response to these various circumstances which this report seeks to investigate.

IC has a complex and long history that has never been documented in a coherent manner that can be accessed by academics wishing to test its validity as a robust discipline. Although the foundations of the discipline are understood by a handful of coaching experts, who have “lived” this history, the theory is not well understood in mainstream academia. The problem lies in the complexities of the fundamental building blocks of what the discipline is about.

According to Williams (2007), “coaching is the second-fastest growing profession in the world, rivalled only by information technology” however, as Janine Everson, expert coach and director of the Centre for Coaching in South Africa points out, “most businesses who engage coaching companies to develop competencies in their workforce do not know the difference between one style of coaching and the next” (Everson, 2011a).

1.1.3. Context and Purpose

Several studies have been carried out in the area of IC (Yodaiken, 2009; Flaherty, 2005) and it has been practiced by businesses, such as Toyota and British American Tobacco South Africa who report its effectiveness (Yodaiken, 2009; Howard & Loos, 2005) however there is a largely undocumented explanation of its roots, development throughout history, and working mechanisms for effectiveness. There is thus a need to research its historical

development in order to further validate and promote its use through better understanding and to correctly classify the discipline in a hierarchical structure of meaning by identifying its distinguishing characteristics and attributes that set it apart from other types of coaching.

If coaching is to gain credibility as a profession, then the practice must be informed by rigorous and substantive theory that can translate into practical use in business (Sieler, 2003b). The purpose of this report is thus to provide further theory for IC by studying its history so that the rigor and substance to which Sieler alludes can be provided.

Although not the focus of this report, one hypothesis of the researcher is that if practitioners of workforce development and performance management are better able to understand how IC may affect competencies in their workforce, and also understand how this discipline may better align employee and firm values, they may be more likely to engage its use for mutual positive benefit.

1.2. Research Questions and Scope

Questions

The questions posed that this research report endeavours to provide clear answers to are:

1. How did IC develop, or evolve? How does the history of IC help to provide meaning?
2. What are the key attributes and relational concepts of IC that allow it to be represented in a model of understanding?
3. What are the key concepts in IC?
4. Is there substantiated evidence to provide support for the theory of IC?

Providing answers to these questions will establish the basis for a clear body of knowledge available to academics and practitioners of workforce development and performance management that wish to enable long-term competence in their organisations through coaching, but are unsure as of which methodology to adopt.

Scope

The studies of IC remain within the domain of “coaching” which distinguishes itself from training, mentoring or consulting. These disciplines are beyond the scope of this study. In addition, IC particularly concerned with teaching coaches how to coach. How this is then applied later on is not the concern of this study.

1.3. Research Assumptions

This study makes the following research assumptions:

- It is assumed the reader is familiar with the various assessment and development models used in IC. It is not the purpose of this report to explain *how* they work– the purpose is to understand where they came from (practically or academically) and *why* they work from a first principles perspective.
- The researcher is aware of the different *types* of coaching courses that address different audiences (e.g. spontaneous vs. competency-based coaching). Everson (2011a) points out that different assessments models, for example, are used in different types of coaching classes. The purpose of this study is not to analyse each type of Integral Coaching and identify which models apply in better situations to which audiences, from where they originated, at which times, and at what depth for each of the courses. The purpose is to examine and investigate the underlying general theories that provide meaning and academic grounding to the Integral Coaching discipline *at large*.
- Spirituality, in this report is understood as awareness and honouring of wholeness and the interconnectedness of all things which does not necessarily require religious affiliation.
- The researcher takes a neutral position in gathering and analysing research data. The researcher remains open and curious to hear all that is being said and will not edit, mask or manipulate data to suit a particular point of view.
- Key thought-leaders, expert coaches and witnesses to past events and contributors to the knowledge of the theory are available for interviewing.
- The opportunity to elicit information from the experts is critical to the sense-making activity. Dates and times of interviews arranged must be respected. To mitigate the chance of dishonouring agreed interview times, they are arranged 2 months in advance and reminders sent 2 weeks and 48 hours prior. The assumption is that all interview sessions are well planned and prepared for, by both researcher and respondent.
- Adequate resources are available to conduct data gathering (e.g. Computers for Skype connectivity and internet availability of data-gatherer and expert, a quiet location for the researcher, etc).
- Interviewees are fully briefed prior to the interview.
- Sufficient time is spent structuring interviews and the appropriate qualitative interview methods are employed (see research methodology in section 3) for this type of research.

- The researcher practices *active* listening throughout the interview process.
- The researcher stays focussed and does not stray from the objectives of the report during interviews. It is the researcher's responsibility, not the interviewee, to collect the required information.
- Finally, the researcher recognises that coaching is practiced differently by various organisations that purport to use an "integral" method. This report will focus on the method used by New Ventures West.

1.4. Research Ethics

The Ethical Clearance on-line form has been submitted on August 31, 2011. In addition to this agreement of ethical conduct:

- All persons being interviewed are fully informed as to the purpose of the interview, the methodology or research being used and what will happen with the data gathered (what it are used for etc) from them.
- All interviewees will have the opportunity to review the written form of data gathered, and to dispute its accuracy as used in the report versus their own perception or interpretation of the knowledge they have imparted.
- The real names of the interviewees are used in the report and they are notified of this prior to submission.
- The interviewees will have unabridged access to the final report by electronic means post-submission.
- Any data gathered from interviewees will not be used for any other reasons than for analysis in this report.
- In the event of an uptake in an academic or commercial interest in the findings from interviewees, recorded in this report, these findings will not be used to promote or sell any product or service or ideology by any organisation or group, private or public. The report endeavours to remain unbiased and impartial in the interest of universal academic and intellectual progress.

2. Literature Review

Various definitions of coaching exist within the context of personal development. Hall, Otazo & Hollenbeck (1999, p. 40) describe coaching as “a form of personal one-on-one learning... used to improve performance or executive behaviour.” Hall (2010, p.1) adds that coaching can be understood as “generative change and development” and coaching operates from “the concern of developing competence, success and well-being”; while Flaherty as cited in O’Flaherty & Everson (2005b, p.6) maintains that coaching can be understood as “a professional relationship grounded in mutual trust and respect and directed towards a set of clear outcomes, guided by presence and informed by broad models of what it means to be a human being.”

James Flaherty, founder of New Ventures West (an organisation offering accredited coaching and leadership development services) contributes an approach to coaching from a holistic and systemic perspective, and describes this form of coaching as a process with specific end-products (Flaherty, 2005). This coaching style has been termed “Integral Coaching”. While many perspectives and orientations of coaching are understood and used in practice, the focus of the literature review in this report is based on the various grounds that are believed to inform IC in no particular order (these will be further investigated through the findings of the research process).

2.1. Integral Coaching

Flaherty (2005, p.2) describes Integral Coaching as follows:

Integral Coaching is what arrives when two people develop a professional relationship that is grounded in mutual trust and respect directed toward a set of clear outcomes, guided by presence, and informed by broad models about what it means to be a human being. It is a methodology. It is an integration project. It is a moment when you feel deeply connected to yourself and others, with a deep acceptance of everything, and you take practical steps to move forward in life. It is both simpler and more complex than it sounds. And, at heart, Integral Coaching is not just an “it” we can see and hear from the outside but also the “I” that lives in our thoughts and emotions and the “we” that connects us to each other in language and culture.

2.1.1. The Products of Coaching

Flaherty (2004, 2005) adopts IC as a concept with specific outcomes in mind so as to distinguish his interpretation from others. He claims that coaching goes beyond being an “accountability partner that supports someone in reaching their goals, or acting as a disciplinarian who changes someone’s actions” (O’Flaherty & Everson, 2005b, p. 5). Coaching, for Flaherty, occurs within a broader framework whose end products embody the concepts of long-term excellence in performance (competence and fulfilment), self-correction, and self-generation. While these are generic goals in their nature, Flaherty & Handelsman (2004) point out that how these concepts are defined depends on the client, so that the purpose of the coaching is defined based on what the client wants to achieve. Having a clear purpose statement provides focus and sense of direction and fosters standards by which the coach and client can assess the effectiveness of the work.

Long-term Excellence

One of the major outcomes of IC, Flaherty & Handelsman (2004) claim, is a personal capacity that endures, as opposed to the achievement of once-off objectives. The goals that the client aims to achieve should be sustainably achievable beyond the coaching process. The core concept here is that challenges are ever-present in life, and thus one of the main products of the coaching process is the development in the client of a level of competence that is sustainable.

Achieving this goal however, cannot be done based on faulty assumptions. Flaherty (2005) warns that if managers adopt a behaviourist or manipulative attitude (i.e. “reward or punishment” thinking) toward bringing about change in others, then long-term competence will never be realised. As complex beings, humans cannot be expected to respond consistently in the same manner when such manipulation is introduced. It is thus essential that the coaching client understand that if enduring competence is to be achieved, an alternative ways of thinking must be adopted. Flaherty (2005) advances the concept of one’s “Structure of Interpretation” (SOI) to explain the mechanism underlying a shift in alternative ways of thinking and acting. This is discussed further in later sections of the literature review.

Further to the concept of enduring competence, Flaherty & Handelsman (2004) assert that fulfilment is also necessary (as an outcome of coaching) as when people feel fulfilled, they are more likely to stay longer with their organisation and be motivated to deliver better

results. Louis (1980) as cited in Chang, Choi & Kim (2008, p. 303) support this view claiming that insufficient fulfilment of what people want from their work (work values) can lead to “reduced satisfaction, commitment, and increased withdrawal intention”. In addition, psychologist Suzanne Skiffington (as cited in Sieler, 2003b, p. 2) claims that “existential issues, such as identifying purpose and meaning in life, alleviating suffering and enabling the individual to live a more fulfilled and joyful life, are central to the coaching process.”

The abilities to self-correct and self-generate

Flaherty (2005) notes that when the coachee is self-correcting, he or she develops the capacity to observe discrepancies between intended and actual coaching outcomes and is then able to bridge the gap. Simply put, the idea of self-correction is reaching a stage when the dependence on the coach is lifted because the coachee can correct themselves in the moment. To be self-generating, the coachee must adopt a process of continuous improvement and look for ways to do so such as watching others perform or learning new activities that will strengthen competence and applying new competencies to new areas in their lives and new structures that were not addressed in coaching. This can be understood as the ability to continuously “renew” oneself by drawing on resources from without and within (Flaherty & Handelsman, 2004) and using the skills learned during coaching.

At the root of the coaching discipline, are the studies and concepts of the main branches of continental and analytical philosophy which are discussed in the following sections.

2.2. Continental Philosophy

Continental philosophy refers to a set of traditions of 19th and 20th century philosophy which is “best understood as a connected weave of traditions, some of which overlap, but no one of which dominates all the others” (Leiter, 2007, p.2). This school of philosophy originated in the second half of the 20th century, and was used to refer to a range of thinkers and traditions outside the analytic movement. Continental philosophy includes the following movements: German idealism, phenomenology, existentialism, hermeneutics, structuralism, post-structuralism, French feminism, the critical theory of the Frankfurt School and related branches of Marxism, and psychoanalytic theory (Critchley, 2001). Several of these concepts, as they relate to the fundamental question of “what it means to be human” are addressed in the literature review as they relate to IC theory.

2.2.1. Existentialism

The exact meaning of existentialism can vary depending on which philosopher or author is describing it, however broadly speaking, existentialism generally refers to a cluster of ideas about human existence beyond science (Crowell, 2010). Crowell explains that, existentially, human beings cannot be fully understood only in terms of scientific categories such as matter, causality, force, function, organism, development, motivation.

Any distinction thus, between the observer and the observed is artificial because existence should be defined solely in terms of the relationship between them. In other words, existence is defined as the *relationship between subject and object*, not subject and object per se.

Søren Kierkegaard and Friedrich Nietzsche, are widely regarded to have pioneered the movement, however the term was explicitly adopted by Jean-Paul Sartre, and became identified with a cultural movement that flourished in Europe in the 1940s and 1950s (Crowell, 2010). Crowell describes that what distinguishes existentialism is not the concern with “existence” in general, but rather the claim that thinking about human existence requires new categories not found in traditional thought; human beings cannot be understood as substances with fixed properties, or as subjects interacting with a world of objects.

The existential philosophies of Kierkegaard and Sartre form a foundation in IC, in that Integral Coaches are concerned more with shifting how their clients observe and interact with the world than solving the material problems that show up in it. The existential perspective shows us that solutions exist within what a client believes is possible through their own interpretations, and that these interpretations are in turn determined not by an objective world, but rather a subjective one. Phenomenology, discussed in the following chapter, provides the Integral Coach with a practical way of thinking about such existential topics that are usually regarded as subjective, as objective.

2.2.2. Phenomenology

Phenomenology is the philosophy of conscious experience. Edmund Husserl is considered to be the father of this school of philosophy who put forth the argument that since each one of us is certain about our consciousness then “if we want to build a framework of reality on solid foundations, consciousness is the place to start” (Magee, 1987, p.254). However, analysis of consciousness requires awareness of “something” which cannot exist as an objectless state-of-

mind (Magee, 1987). Further to this, Husserl claimed that distinguishing between states of consciousness and objects of consciousness is impossible, but that in itself should not stop philosophy from progressing. Rather, he points out, that even if there is no doubt that our objects of consciousness exist as objects of consciousness *for us*; we can still investigate them without making assumptions about their independent existence at all. To summarise, the core of phenomenology is the claim that whether or not objects exist independently of our consciousness, we can still study their existence and effect in the world.

From the perspective of coaching, the concept of phenomenology is important to understand, as it provides a fundamental basis from which to understand human behaviour. Merleau-Ponty (1945) as cited in Howard & Loos (2005, p. 16) defines phenomenology as “the study of essences; and according to it all problems amount to finding definitions of essences: the essence of perception, or the essence of consciousness, for example.” Phenomenology thus provides a way of thinking about topics that are usually regarded as subjective, as objective. In doing so, a way of thinking about our existence is established as something that is an integrated part of the universe, and not simply a subjective conscious experience of it.

Merleau-Ponty (1962) in his book *Phenomenology of Perception*, attempts to reveal the phenomenological structure of perception by introducing the concept of the ‘primacy of perception’ which rejects the, until then, traditional dualistic view of body and mind. Merleau-Ponty thus, takes the view, that we are an integral part of our environment, part of it, and not just observing it – or as he describes it, an “intersubjective field” of consciousness.

By considering these concepts of phenomenology, the coach must account for their own behaviour as it is this behaviour, Flaherty (2005) claims, that accounts for outcomes. Flaherty poignantly remarks, “a coach whose work does not affect outcomes will soon find himself unemployed” (p. 8). In order to account for behaviour then, the coach must understand that it is not externalities that account for behaviour but rather one’s internal interpretation of them.

2.2.3. Hermeneutics

Hermeneutics is the study of interpretation, which attempts to explain how we respond to our environment internally based on learned experience. Wilhelm Dilthey as cited in Shionoya (2010, p. 191) used hermeneutics to build human and social sciences on “a different methodological basis from the natural sciences”. Instead of taking a purely scientific view of

the world, Dilthey tried to derive an interpretation of the historical world in terms of “experience, expression and understanding” from the structure of life’s “reason, feeling and will.”

Martin Heidegger, the German philosopher known for his existentialist views, shifted the focus from interpretation to an existential understanding. In essence, Heidegger attempted to “reconstruct” hermeneutic studies to a new approach to ontology, making a distinction between “entities” and “being” (Shionoya, 2010). Heidegger, in his magnum opus *Being and Time* (1927) first introduced the concept of the *Daßein* – which loosely translated, can be understood as “being-there / there-being”: a conceptual picture of our “being” as something separate, or different to an “entity”. In German, *dasein* is the term used to describe “existence”, however Heidegger was adamant about the *dasein* not being mistaken for a subject that is something definable in terms of consciousness or self (Shionoya, 2010).

In contemporary hermeneutics, Hans-Georg Gadamer, author of *Truth and Method* (1960) develops the study further by asserting that “methodical contemplation is opposite to experience and reflection”. That is to say, we can only reach the “truth” if we understand and master our own experience. Gadamer claims that experience is not fixed, but that perspectives are always changing.

Central to Flaherty’s (2005) philosophy of coaching is the idea of what he terms one’s “Structure of Interpretation”. Flaherty coined this term after being influenced by various philosophical concepts to explain a model that describes how language and practices affect people’s interpretation of the world, which in turn, drives our behaviour.

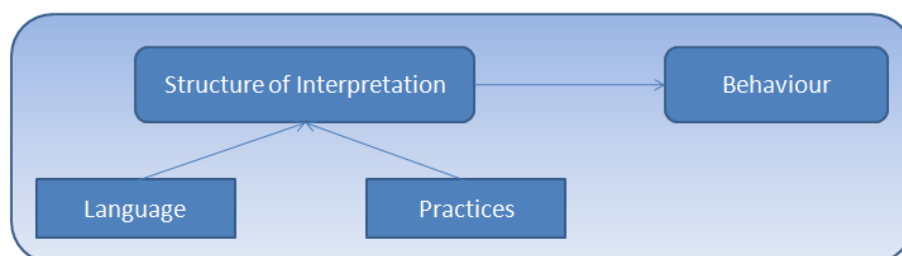


Figure 1: Flaherty’s “Premise of Coaching” model

Source: Flaherty (2005, p. 8)

2.2.4. Pragmatism

Pragmatism in its broadest sense refers to linking theory to practice. Magee (1987, p. 283) states that the word “derives from the Greek word for a deed or action”. Traditional research looks to provide meaning and evaluate consequences. For pragmatists however, values and vision precede a search for explanation (Cherryholmes, 1992). Pragmatic research is driven then, by anticipated consequences. As Cherryholmes (1992, p. 13) states, “Pragmatic choices about what to research and how to go about it are conditioned by where we want to go in the broadest of senses. Values, aesthetics, politics, and social and normative preferences are integral to pragmatic research, its interpretation and utilization.”

House (1991, p. 3) as cited in Cherryholmes (1992) notes that scientific research always takes place in social, historical or political contexts and therefore we can never be sure if we are observing the “world” or simply observing ourselves whereas the pragmatist believes in the possibility of explaining the real world by discovering more complex layers of reality to explain other levels. Pragmatists thus take view that the external world beyond our own consciousness exists.

John Dewey, an American functional psychologist, and thought-leader in the field of pragmatism declared:

Pragmatism... does not insist upon antecedent phenomena but upon consequent phenomena; not upon the precedents but upon the possibilities for action. When we take the point of view of pragmatism we see that general ideas have a very different role to play than that of reporting and registering past experiences. They are the bases for organizing future observations and experiences (Dewey, 1931, p. 32-33 as cited in Cherryholmes, 1992, p. 13).

What Dewey implies here is that how we think about the consequences of our actions should be determined by the outcomes, and less so by theory. The implications of this on coaching are thus doing *what works*, based on the uniqueness of the client being coached. Flaherty & Handelsman (2004) suggest that the philosophies of pragmatism ask us to do what works today independent of what worked yesterday. This is however, not easy, as we often fall into habits. Flaherty (2005, p. 11) follows this asserting that “practical outcomes replace

theoretical constructs.” His view is that a coach who claims that he or she did everything correctly but whose coaching didn’t work was only following a “rote routine that may have worked before.” The adoption of pragmatism thus requires the continuous “undoing” of any conclusions drawn, and facing each coaching mission with a willingness to learn that what worked last time, may not work now.

2.3. Analytic Philosophy

2.3.1. Linguistics

Ludwig Wittgenstein, the Austrian philosopher, scholar and author of *Tractatus*, inspired the philosophy of “ordinary language” (Magee, 1987) by explaining meaning pictorially. Wittgenstein believed that meaning could be broken down into elementary linguistic statements which picture various possible states of affairs, and that these statements are “linked together, or set off against each other, or negated with logical constants” (p. 323).

Wittgenstein was mostly concerned with the relationship between linguistic propositions and the physical world. He believed that since the logic of language (syntax, semantics) is not evident in our everyday use of it, providing an account of relationships between linguistics and the world could solve all philosophical problems.

The importance of language in coaching from this perspective is further explained by Flaherty (2005) who states that, “language is an orientation to our common world” (p. 31). The tool that coaches use is nothing other than language, and thus in efforts to bring about change in the behaviour of the coachee, new language, Flaherty claims, should pave the way for “new actions and a new worlds to follow” (p. 32).

This concept is further supported by Winograd & Flores (1987), authors of *Understanding Computers and Cognition*, who claim that “nothing exists except through language” (p. 68), however the authors describe a problem in using language to differentiate between the objective and subjective in stating:

There is a naive view that takes language as conveying information about an objective reality. Words and sentences refer to things whose existence is independent of the act of speaking. But we ourselves are biological beings, and the thrust of Maturana’s

argument is that we therefore can never have knowledge about external reality.
(Winograd & Flores, 1987, p. 50)

By “Maturana’s argument”, Winograd and Flores refer to the work of Humberto Maturana and Francisco Varela on what it means to be a living organism and what kind of biological phenomenon is the phenomenon of cognition (Maturana & Varela, 1980). The authors, in their work of *Autopoiesis and Cognition*, construct a “systematic theoretical biology” which attempts to define living systems not as objects of observation but as self-contained entities whose only reference is to themselves (Sieler, 2003b). The result of their investigations is a completely new perspective of biological phenomena. This is discussed further below in section 2.4 and 0.

Language and Speech Act Theory

Language is one of the main vehicles humans use to convey meaning, however Merleau-Ponty (1991) in his book *Consciousness and the Acquisition of Language* makes the argument that in the traditional Cartesian sense, “there is no plane on which consciousness and language meet”, and therefore deploying meaning by communicating consciousness is not possible using only conventional language. In his words (p. 4):

Language is an uttered message, but it does not itself imply effective communication. The word does not have any power of its own. Thus the best language would be the most neutral, and the best of all would be a scientific language, that is, an algorithm, where there is no possibility of equivocation.

In following this, John Searle, American philosopher of language and mind, in such works as *Speech Act Theory and Pragmatics* (1980), and *Speech Acts: An Essay in the Philosophy of Language* (1969), attempts to construct a semantic coding of language that works to explain ambiguities inherent in linguistic communication. Searle called this tokenised model of language, “Speech Acts” which describe elements of communication used to convey intent such as promises, orders, greetings, warnings and invitation (Searle, 1980; Searle 1969).

Intent or rather, *intentionality*, in a philosophical sense, describes the “aboutness” of entities. It is “the distinguishing property of mental phenomena of being necessarily directed upon an object, whether real or imaginary” (intentionality, 2011). “Speech Acts” are described by

Austin (1975, p.94, 109) to have three elements – locutionary acts (ostensible meaning), illocutionary acts (intended meaning) and perlocutionary acts (the actual effect of speech, e.g. conveying meaning without intention).

What is important about “Speech Acts” is that they produce an effect. Sieler (2003a) notes that if one performs a request, they are alerting a personal need, and the possibility of someone else doing something. If the act is a promise, then one produces the effect of someone else anticipating the subject doing something. Since these acts produce effects, they have an impact on reality and generate change. Sieler (2003a, p. 94) claims that “Speech Acts can alter the meaning of situations, which includes personal interactions. Speech Acts can enhance relationships and create new possibilities for future interactions.”

Herbert Clark (1996), in *Using Language*, draws on the works of Austin and Searle (among other authors) to examine the social and cognitive aspects of language. In his work, Clark (1996), from his own empirical studies proposes that “language use is really a form of joint action” (p. 3). In making this thesis, Clark (1996) proposes that people use language to coordinate joint action with one another. Joint activities require coordination of both content of the activity and the process which makes the activity move forward.

2.4. Biology and the Embodied Mind

Chilean biologists and philosophers, Humberto Maturana and Francisco Varela, found that a linguistic description pertaining to the ‘organization of the living’ was lacking. The authors, from their investigations of vision, coined the word ‘autopoiesis’ to convey the central feature of the organization of the living, which is autonomy (Maturana & Varela, 1980).

Sieler (2003b) notes that Maturana’s research on the nature of perception provided biological grounding for coaching (see section 2.6). His findings led him to question the commonsense understanding of perception which led to the theory of living systems, language and cognition. In this theory, Maturana notes that what is observed in the world depends on the observer and that it is the structure of the nervous system that primarily determines at any point what reality is (individually and collectively) (Sieler, 2003b). This theory ties in very closely with the existential philosophy of Heidegger and the linguistic works of Searle and Wittgenstein.

Furthermore, phenomenology and the epistemology of Buddhist traditions have both assumed a link between cognition and action in a world that is inseparable from our experience of it. In recent literature, Varela (1999) directly addresses the question of how biological science can be brought to connect with experience. Varela hypothesises that humans unconsciously execute habitual actions through processes that are not the result of conscious judgement but rather part of habitual self-organisation.

The key finding from a coaching perspective is thus that the coachee is limited only by how they observe their world, and that any problems, possibilities and solutions exist in the “eye of the beholder” (Sieler, 2003b).

2.4.1. The Mind-Body Link

Through studies of trauma and psychobiology, physics and the biology of emotions, Van Der Kolk (1994), Dossey (1992) and Damasio (1999) as cited in Wilder (2005, p. 95) independently suggest that the body-mind connection is a “non-esoteric reality”. Wilder (2005) suggests that the body is a key component in how people acquire knowledge and experiences themselves in relationship with others. As cited by Wilder (2005, p. 98), Saleeby (1996, p. 114) claims that:

Experience is not a concept or an abstraction . . . the intensity, urgency, and immediacy of lived experience is somatic. To be “in” a situation requires sensuous attendance and a vibrant contextual sense of self, for the body knows context in a way that the intellect does not.

“Somatics” to which Saleeby refers is a discipline which employs holistic body-centred approaches to assist people in integrating and transforming the self through movement and awareness practices. The intended outcome of these practices is to promote psycho-physical well-being (Wilder, 2005) by integrating body and mind. The concept of the soma is that the mind and body are both part of a living process, which is contrary to beliefs in most Western cultures. A fundamental principle is that growth, change, and transformation are always possible at any age. Such practices, in IC, have the effect of shifting one’s SOI, and in turn their behaviour toward an intended outcome (see **Figure 1**).

2.5. The Integral Approach

Ken Wilber has written much about adult development, philosophy, ecology and stages of faith. His work culminates in what he refers to as “Integral Theory” which, although not the core focus (Flaherty, 2011), has influenced many aspects of IC. In 1998 Wilber founded the *Integral Institute* for the teaching and application of Integral Theory.

2.5.1. Integral Psychology

Wilber (2000a) as cited in Landrum & Gardner (2005, p.248) describes integral psychology as an endeavour to “honor [sic] and embrace every legitimate aspect of human consciousness”. He warns scholars that his theory of integral psychology is not about uniformity, and affirms that it must embrace difference (Howard & Loos, 2005). Unlike with other organisational development models, Cacioppe & Edwards (2005) claim that the comprehensive nature of Wilber’s integral model allows for “detailed analysis of the complexities that contribute towards development” (p. 92).

The Four Quadrants Model

Wilber (1996, p. 71, 107) synthesises Western and non-Western philosophies of psychology and human consciousness, into a four quadrant model he calls “All-Quadrants-All-Levels” (AQAL). Scharmer (2009, p. 102) claims that Wilber’s “integral approach is probably the most comprehensive integrative framework developed to date” however the origins and influence for his model are numerous. The framework is based on two sets of distinctions, according to Scharmer. The first, built on Jürgen Habermas and Karl Popper’s work, differentiates between three (or four) dimensions of the world: The “it” world (objectivity), the “we” world (intersubjectivity), and finally, the “collective it” world (interobjectivity). The second distinction differentiates among the developmental stages of the self, which Wilber found to be the same in traditions across various cultures and ages (Scharmer, 2009). The model is intended to reflect both internal and external aspects of the individual psyche (the “I” and “it”) as well as group associations (the “we” and “its”). The left side of the quadrant represents both the inner aspects of the individual and group (consciousness and subjectivity) while the right side represents the outer aspects of the individual and collective (objectivity and material). Represented visually as such:

	Inner	Outer
Individual	Focus is on what is not seen; what is inside; thoughts, emotions, feelings ("I")	Focus is on the outside observable behaviour of the individual ("it")
Group	Focus is on culture; cultural values; worldviews ("we")	Focus is on society at large; the world; social systems ("its")

Figure 2: Wilber's Four Quadrants model

Source: Landrum & Gardner (2005, p.248)

Each quadrant thus represents how individuals describe their state of consciousness in that area. Kofman (2002) describes this model as it relates to organisations, with the "it" relating to an impersonal, technical, task-oriented dimension that considered effectiveness, efficiency and reliability of the organisation. The "we" (interpersonal) dimension considers relational aspects such as solidarity, trust, and respect of the relationships between stakeholders, while the "I" (personal) dimension considers behavioural aspects such as health, happiness and need for meaning. Kofman's tenet is that to lead businesses successfully, all levels of the organisation need to engage in the personal and interpersonal dimensions, not simply the impersonal. Kofman (2002) as cited in Cacioppe & Edwards (2005) indicates that integral theory has been applied through corporate coaching in organisational settings. Flaherty & Handelsman (2004) indicate that Integral Coaches use such an integral model to help people integrate the major dimensions of their lives, and in doing so can help identify where their attention is placed (i.e. where they think their "problems" may lie and what they may be neglecting).

Wilber (2000b, p. 149-150) points out several comparisons in this model to other researchers. Notably, he makes reference to Habermas' three validity claims for truth/objects (right half), sincerity/subjects (upper left), and justice (lower left); to Karl Popper's "objective" World I (right half), "subjective" World II (upper left), and "cultural" World III (lower left); to Plato's "Truthfulness" (objectivity/it), "Goodness" (cultural justice/appropriateness/we) and "Beauty" (individual/aesthetic/I); and even to Kant's three critiques: Pure Reason (theoretical it/reason), Practical Reason or (intersubjective morality/we), and personal Aesthetic

Judgement (I) (Wilber, 2000b, p. 150). Thus, Wilber states, “although other items are included as well, these three great domains – the Big Three – are especially the domains of empirical science, morality, and art.”

Flaherty & Handelsman (2004) describe several aspects of the model which are summarised below:

1. The quadrants are not separate phenomena but four different windows on the same person.
2. To develop competence, it is important to pay attention to all four quadrants.
3. There are skilful means for each quadrant which relate to what is required to develop competence in that domain (e.g. for quadrant I, self-observation and sincerity, for II, exercise, diet and somatics, for III, building networks of support, for IV, attending to the physical space where we spend our time)
4. At the organisational level, it is important for initiatives to address all four quadrants.

However, Volckmann & Grove (2005) point out a challenge. The authors note that coaches using integral theories have had to translate their work in ways that engage business in effective developmental processes. Beck (2002) as cited in Volckman & Grove (2005), mentions that some developers of these frameworks even caution against using such philosophical terminology in the workplace. Thus the challenge to bring about effect change by incorporating integral theories into the coaching discipline is to adapt a vocabulary of terms with which the coachee can easily identify.

2.6. Ontology

Ontology, one of the major branches of philosophy, is the study of the categories and nature of what exists (Hofweber, 2011). The study dates back to the works of Socrates, Plato and Aristotle in Ancient Greece where major debates surrounded the concepts of what entities exist and how they can be classified within a hierarchy and divided according to certain characteristics. However, it was major developments in the 20th century such as biology, anthropology, sociology, linguistics and quantum physics which heralded the academic foundation for the development of ontology as a basis for professional coaching (O’Flaherty & Everson, 2005b). It is these developments that have fostered new understandings of what it means to be human and what drives human behaviour. These developments have been

integrated to form a new field of knowledge, called the “Ontology of the Human Observer”, as a discipline for professional coaching (O’Flaherty & Everson, 2005b).

2.6.1. Way of Being

Sieler (2003a) describes a *Way of Being* – a model used to explain the ontological coaching process by linking together the concepts of humans as linguistic beings, emotional beings, and physiological beings. Sieler argues that these domains of being each represent an area of learning and that for behaviour to change through coaching, changes need to take place in all three areas.

The role of the coach is thus to assist the coachee to change his or way of observing the world so that they may open a range of new personal and professional possibilities for themselves. Sieler (2003a) suggests that in order to introduce change, two types of learning must manifest: first-order learning, referring to the observation of how behaviour influences outcomes, and second-order learning, referring to how the learner (coachee) must be aware of their *Way of Being*. Awareness of the three domains discussed, Sieler claims, is at the heart of the coaching process.

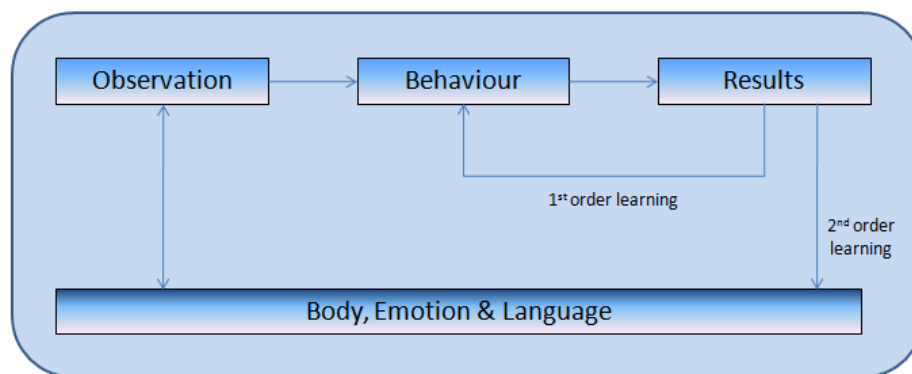


Figure 3: The Observer and Second-order Learning Model

Source: Sieler (2003a, p.34)

Sieler’s claims draw similar parallels to those of Knowles and Kolb in adult and experiential learning discussed in the following section.

2.7. Adult Education and Experiential Learning

Knowles theory of adult learning, or andragogy, provides a framework for understanding how adults learn. Knowles (1984) describes the principles of this theory by explaining that adults

need to be involved in the “planning and evaluation of their instruction”. Knowles also believed that experience provides the basis for learning (e.g. learning from past success or mistakes) and that adults are most influenced by what has immediate relevance to their job or personal life, and thus they foster a higher degree of interest for learning such subjects. Knowles (1984) also points out that because adult learning is problem-solving oriented and not content-centred, adults are more motivated to learn when they know that there will be a useful outcome from their learning.

O’Flaherty & Everson, (2005b, p. 8) claim that Knowles’ research provides insights for why coaching works well for leadership development:

1. Firstly, the coachee retains “captaincy of the learning process” and maintains responsibility for the outcomes. Leaders hold no one but themselves accountable for their learning and actions.
2. Secondly, leaders use their own experience as a basis for action, reflection and growth. The coach uses language and questions to help the leader to observe their actions in ways which can help to unlock new possibilities.
3. Thirdly, during coaching, leaders find their own solutions, rather than being told what to do, and in doing so they develop and sharpen the competencies described in the Four Quadrants model (previously described).

Kolb (1984) explains the experiential learning process through various models. The author claims that learning follows a four-stage cycle as shown in Figure 4. According to the Lewinian model, concrete experience is followed by observation and reflection. From this input, abstract concepts and generalisations can be formed. The implications of these concepts are then tested in new situations from which new experience arises.

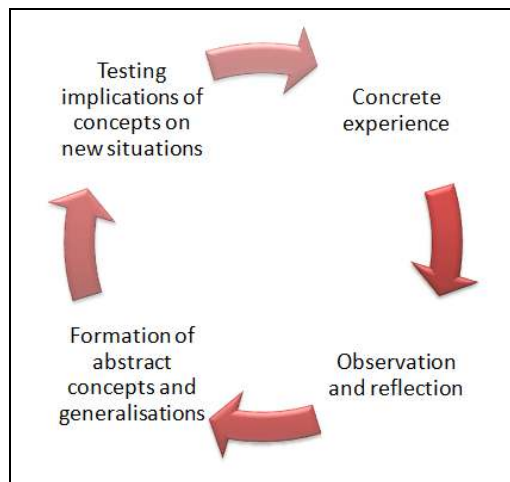


Figure 4: The Lewinian Experiential Learning Model

Source: Kolb (1984, p.21)

American pragmatist John Dewey presents a similar model of the learning process, however he places greater emphasis on the process of feedback in transforming the impulses, feelings, and desires of concrete experience into purposeful action (Kolb, 1984). The author explains that “the impulse of experience gives ideas their moving force” and that “postponement of immediate action is essential for observation and judgement to intervene” while “action is essential to achieve purpose” (p. 22). Kolb (1984) claims that it is through integrating these processes that mature purpose develops from blind impulse.

Kolb & Kolb (2005), drawing on the theories of Dewey and psychologists Kurt Lewin, Carl Jung, Carl Rogers, Jean Piaget and pedagogical theorist Paulo Freire, explain the propositions of experiential learning theory (ELT) and adult development:

1. Learning is best perceived as a process, not in terms of outcomes.
2. Learning is best facilitated by a process that draws out the students’ beliefs and ideas about a topic so that they can be examined, tested, and integrated with new more refined ideas (i.e. learning is “relearning”).
3. Learning requires resolution of opposed modes of adaptation to the world.
4. Learning is a holistic process of adaptation to the world.
5. Learning results from synergetic transactions between people and the environment.
6. Learning is the process of creating knowledge.

Experiential learning theory, according to Kolb & Bolb (2005) defines such learning as “the process whereby knowledge is created through the transformation of experience” (p. 194) – a similar conclusion to that of Sieler’s *Way of Being*. Knowledge then, as the authors explain, results from the combination of grasping and *transforming* experience.

Cognitive Sciences and Learning

Zull (2002) as cited in Kolb & Kolb (2005, p. 194,195) claims that the “learning cycle arises from the structure of the brain”. Experience comes through the sensory cortex, reflective observation involves the integrative cortex, creating new abstract concepts occurs in the frontal integrative cortex and acting testing involves the motor brain.

Zull illustrates this in a model:

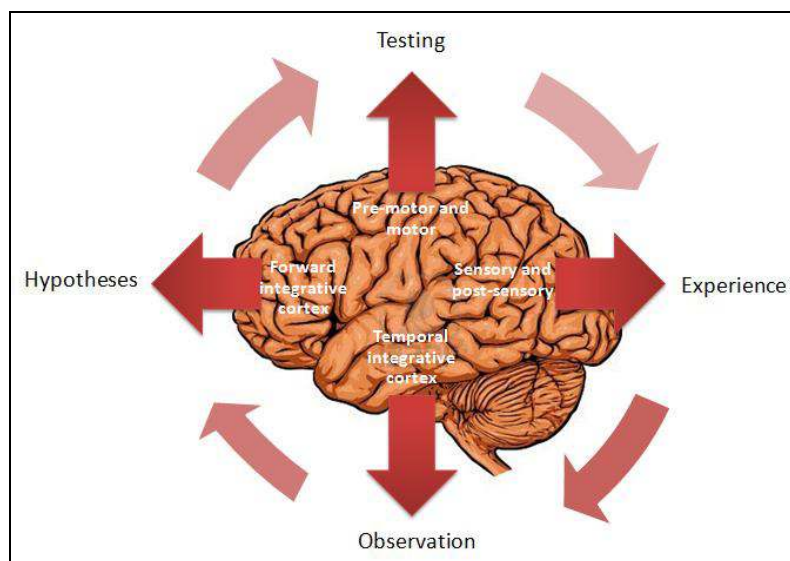


Figure 5: The Experiential Learning Cycle and Regions of the Cerebral Cortex

Source: Kolb & Kolb (2005, p. 195)

Kolb (2005) posits thus, that our heredity, particular life experiences, and the demands of our environment, all play a role in our developing a preferred way of choosing among the four modes of learning. “We resolve the conflict between being concrete or abstract and between being active or reflective in patterned, characteristic ways” (Kolb, 2005, p. 195).

Kolb & Kolb (2005) claim that learning is a major determinant of human development, and how individuals learn shapes the course of their personal development. Given that most coachee clients are adults (Everson, 2011a), understanding adult development and experiential learning is important for developing coaching programmes. Unlike with teaching children, coaches will often have to work in ways that facilitate new experiences by supplementing existing knowledge or beliefs rather than instilling new ones.

2.8. Perception and Cognition

Fernando Flores was greatly influenced by the novel, yet biologically grounded, ideas of Maturana on perception, cognition, language and communication (O’Flaherty & Everson, 2005b). These conversations were a key inspiration for his research, in which he particularly focused on Heidegger’s existentialist philosophy and Searle’s theory of Speech Acts. Flores was able to integrate the ideas of Gadamer, Maturana, Heidegger and Searle to produce a new understanding of language and communication, which provided a foundation for the coaching discipline.

In *Understanding Computers and Cognition*, Winograd & Flores (1987), address the nature of reality and human knowledge by bringing together two philosophical methods that have traditionally opposed each other – that of the continental ‘rationalist’ and existential school of thought with that of the analytic and ‘empiricist’ (experimental) school.

Although the authors claim that they are not concerned with the debate between rationalists and empiricists, in focusing on the phenomenological works of Heidegger and Gadamer, the linguistic works of Wittgenstein and Searle and biological experiments of Maturana, the conclusions they draw from the claim that “there is no difference between perception and hallucination” (Winograd & Flores, 1987, p. 42) are profound: “we therefore can never have knowledge about external reality” (Winograd & Flores, 1987, p. 50).

2.9. Conclusion

Drawing on the 20th century philosophical works of Heidegger & Flores, the linguistic concepts of Wittgenstein, Searle, Austin, biological ideas of Maturana and Varela, and integral philosophies of Wilber and Flaherty, the picture of what informs IC in its broad sense is painted.

What is clear from this literature is that human beings yearn to consume and generate meaning. The existential and ontological arguments of Heidegger & Flores have shown that thinking and understanding are acts of interpretation. To engage in the world we live in, we are continuously learning and adapting, and this in turn changes our interpretations of the world which determine our behaviour. All of this, as Searle, Wittgenstein, Maturana and others have shown us, happens within language and body: the fundamental constructs we use to understand and convey understanding of the world we interpret.

If knowledge-based organisations want to develop long-term excellence in their adult workforce in positive, sustainable, self-generating, and self-correcting ways, then behaviour must change. As the literature explains, such changes in behaviour require shifts in interpretation that must be engendered through *practical* adult learning. The Integral Coach must then take all of this knowledge into account.

3. Research Methodology

As part of the sense-making activity, research requires careful planning, structuring, and execution to comply with the demands of truth, objectivity, and validity (Brynard & Hanekom, 2006). A research methodology is applied as a means to reach the set of objectives of this study as well as relating to how the problem encountered is solved. Research is typically categorised into two main groups: qualitative or quantitative research. Both methods make use of specific techniques to collect and analyse data for the purposes of either theory building (inductive approach), or theory testing (deductive approach). This report takes the inductive approach.

3.1. Research Approach and Strategy

Searching to explain where we came from and how it all began is precisely the type of research that astronomers and astrophysicists conduct in trying to account for the creation of the universe (Leedy & Ormond, 2007). However, as the authors mention, “one does not have to design a research report on a cosmic scale to engage in the same kind of detective work that reels backward in search of answers” (p. 172). By observing a series of seemingly unrelated events (or themes), the historical researcher develops a rational explanation for their

sequence, investigates relationships among them, and then infers about their effects (Leedy & Ormond, 2007).

Researchers of psychological processes study behaviours and mental processes whereas historians study events of the past. Both might be interested in the same behaviour, but the time frames and methods employed in study are usually distinct (Benjamin, 2009). Benjamin gives the example of marriage and alludes to the fact that the researcher interested in the phenomenon and psychology of marriage might study marriage using surveys, ex post-facto (historical) methods, or quasi-experimental designs, looking into the past to give meaning to the phenomenon as it exists today. Historians, however, would likely look at marriage as a Victorian England institution and would use a host of different methods to describe the same concept without necessarily conveying meaning (Benjamin, 2009).

This report uses a *historiographical* approach to offer insights into the origins of the theory of IC and how and why this type of coaching plays a relevant role in a modern business landscape. This is an inductive approach using a qualitative analysis strategy that aims to build on existing theory in the field.

Historiography is the study of historical perspectives that expose themes which, when pieced together, provide understanding for theories that have developed over time (Leedy & Ormond, 2007). A historiographical approach to sense-making differs markedly from chronology – the simple listing of dates and events that historians tie together to record history (Leedy & Ormond, 2007). By contrast, historiography (historical research), looks to seemingly random themes that have emerged throughout the course of history that offer insights to help *explain* real world phenomena in the world we live in. Thus, it can be understood that the historiographic method is not the accumulation of facts, but rather the interpretation of them.

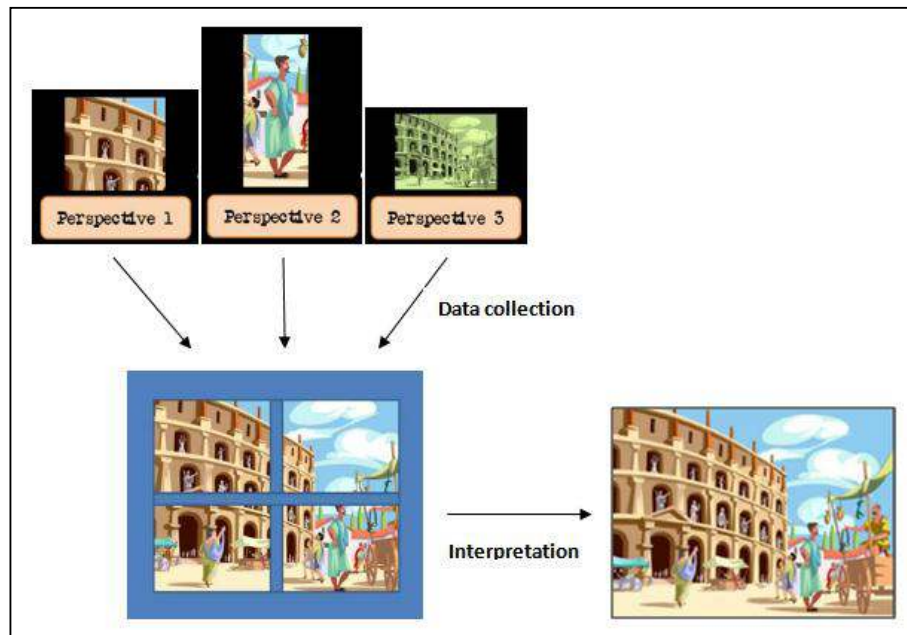


Figure 6: The Historiographical Process

Source: <http://bit.ly/a9Yc9G> (University of South Florida, Creative Commons Licence)

The process of beginning with a phenomena and going backward in time to identify possible causal factors is sometimes called “ex post facto” research (Leedy & Ormond, 2007). The specific phenomenon – in this instance, Integral Coaching – is investigated by eliciting the ideas and events that influenced its development into the discipline as it is understood today and how this knowledge may help in answering the research questions.

Benjamin (2009) claims that historiographical researchers infer meaningful relationships from a reconstruction of past events where relevant variables have been manipulated (in some cases, centuries ago). The explanatory product is thus a narrative of past events. Commager (1965, p.3) as cited in Benjamin (2009) notes that “history is a story... If history forgets, or neglects to tell a story, it will inevitably forfeit much of its appeal and much of its authority as well.” In the context of this research report, this matter is of critical importance. Since the history and origins of the phenomena of IC exist only, at this stage of writing, in the minds of few practitioners who value its method, a need arises to articulate and describe, in a coherent, logical and flowing manner, relationships between the events that define its mechanics and separate it from other aspects of coaching so that future researchers may have a clear and contained theory with which to work and test the theory.

History is not a science, but as Commager (1965, p. 12) in Benjamin (2009) points out, “[it is] clear that history uses or aspires to use the scientific method. That is, it tests all things which can be tested.” This is the value of describing Integral Coaching through a robust, well-planned process.

Although a contemporary research method, some previously credible examples of cases where the historiographical approach has been used to provide meaning include the works of *The Historiography of Communism* (Brown, 2009) and a doctoral dissertation at the University of New Hampshire (Leedy & Ormrod, 2007) by Matthew McKenzie, PhD. In McKenzie’s dissertation on the Boston Marine Society, the historiographical method is used to provide a narrative with “historical events and interpretations seamlessly interwoven throughout the discussion” (p. 174).

Marius (1989) offers useful *rules for argument* for historical research:

1. *State the argument early in the game:* Data is not only being presented, but also interpreted. Readers should not be left to guess any meaning, and inferences should be clearly structured.
2. *Provide examples to support assertions made:* A more convincing case is made when examples are given of data that lend credence to a position.
3. *Give fair treatment to perspectives different to one’s own:* Describe competing interpretations and provide evidence to support them.
4. *Point out the weaknesses of one’s own argument.* Portray credibility as a researcher by pointing out possible room for alternative interpretation before others do.

3.2. Research Design and Data Collection Methods

This report takes an *explanatory* approach to research design. Care is taken to avoid invalid inferences and to incorrectly assume that correlation assumes causality. Appropriate methods of analyzing collected data are employed with this in mind (see Data Analysis Methods).

Bryman & Bell (2007) recommend the use of semi-structured interview techniques to elicit relevant data for qualitative research studies. Such interviews are a way of making tacit knowledge more explicit. Each interviewee is asked, in a guided manner, to recount their perspective of the events, people, events and ideas that influenced IC development from its

origins. Individual bias is eliminated by keeping the interviews separate and comparing their accounts (also known as triangulation or cross-referencing).

The process, as described in Leedy & Ormrod (2007), followed is as such:

1. Plan time for interviews (possibly more than one session per interviewee).
2. Based on existing knowledge of IC gained through literature review and other observations, structure a sequence of historical events and ideas with which to guide the discussion (see Research Instrument).
3. During each interview, for each historical event, identify sources that describe the event:
 - The thought leaders
 - Titles and descriptions of their work
 - Descriptions of the event or ideas
 - Evaluate each account:
4. Is there an attempt to evaluate the sources of evidence? If so, in which ways?
5. Does the account show an awareness of historical time?
6. Does the account show an awareness of historical space?
7. Is this account interspersed with other interpretations of historical data?
8. Compare the accounts from each interview. How did the study and comparison of accounts help gain greater understanding?

3.3. Research Instruments

In qualitative analysis, the researcher is the main instrument. In the case of this report, the researcher is facilitated by open-ended expert interviews in which the respondents are asked to recall past events and to reflect on them. Bryman & Bell (2007) suggest that there is usually a cluster of fairly specific research concerns to do with particular epochs or events, so there is some semblance to a focused interview using this method.

Based on the transcription of a 3 hour video dialogue with Integral Coaching practitioners (see Appendix in section 7.2), a historic synopsis of the evolution of IC emerged which is summarised and used as a structure with which to develop a guide for the interviewees through the major turn of events of ideas that developed into the discipline as it is known today. This interview guide can be found in the Appendix in section 7.1. For each theme, the

interviewee is asked to recall the sequence of events, persons and ideas which explain that theme.

Particularly, respondents are asked to describe *critical incidents* which are defined broadly by Flanagan (1954), as cited in Bryman & Bell (2007, p. 227), as “any observable human activity where the consequences are sufficiently clear as to leave the observer with a definite idea as to their likely effects.” The outcome of this process is the common narrative that describes how these themes link together to provide meaning for the practice of IC.

3.4. Sampling

Non-probability sampling is used. This refers to a sample that “has not been selected using a random selection method.” Such a sample can be defined further as a convenience sample, which is chosen “by virtue of its accessibility” (Bryman & Bell, 2007, p.197).

A limited research budget and time constraint meant that only secondary sources (interviews) were used to collect data for this report. Secondary sources (such as witnesses) were used to describe primary sources (such as manuscripts, journals, books or original thought) which are the preferred data source for historiographic analysis.

The experts have been so chosen due to their deep knowledge, acute insights from and exposure to the historical fundamentals of IC. The objective is thus to elicit and synthesize recollections of these fundamentals and in so doing, build a model of understanding that gives rise to meaningful interpretation of the discipline.

It would be impossible, given the time available, for the researcher, by examining primary sources, to accumulate the equivalent amount of knowledge that these experts have accumulated over a lifetime of learning and experience. In the interest of time and efficiency, collecting data from the recollections of secondary sources is preferred for this report.

The following IC experts are interviewed for this report:

<u>Name</u>	<u>Location</u>	<u>Profession</u>	<u>Expertise</u>
James Flaherty	United States	Director, New Ventures West	James is the founder of New Ventures West and author of <i>Coaching: Evoking Excellence in Others</i> . He designed the

			Professional Coaching Course in 1995 and has led it over 43 times. He also coaches senior executives and provides coach training within Fortune 500 companies and other large organizations.
Stacy Flaherty	United States	President and CEO, New Ventures West	Stacy, an expert accredited coach, is president and chief executive officer of New Ventures West.
Steve Marsh	United States	Vice President of Leadership Programs for Integral Leadership, LLC	Steve is active in the integral community, an associate of the Integral Institute, and founder of a global community of about 90 practitioners and theorists of integrally informed leading and organizing. He is an expert on somatic bodywork and self-leadership and faculty member of New Ventures West.
Craig O'Flaherty	South Africa	Director, Centre for Coaching	Craig O'Flaherty is a highly experienced Integral Coach who has worked to coach senior executives in leading South African organizations and to train prospective business and life coaches for the past 10 years. He is the Director of The Centre for Coaching – at the Graduate School of Business, University of Cape Town, as well as Director of Coaching Matters, a consulting and executive coaching practice.
Janine Everson	South Africa	Academic Research Director, Centre for Coaching	Janine is a certified Professional Integral Coach and Academic Director of the Centre for Coaching. She also holds the position of Senior Lecturer at the GSB, where she lectures in Coaching and Leadership Development to MBA and Executive Education students. Janine has delivered and published research papers at several academic peer-reviewed conferences, and has published book chapters and articles on the topic of coaching in leadership development.

Table 1: Sample of interviewees

3.5. Research Criteria

Saunders, Lewis & Thornhill (2009) point out four issues of using interviews as a data-collection method namely: reliability, bias and validity and conformability.

Reliability refers to the extent to which the data collection techniques will yield the same results if replicated by another researcher (Leedy & Ormrod, 2007). To meet the test of reliability, the researcher will ensure that all procedures followed and materials used during the research are documented. The researcher will document all relevant environmental changes, and account for how, if at all, they have impacted the research.

Bias can include participant bias as well as observer bias. Participant bias may occur where participants say what they want the researcher to know, not what the truth is. This can be eliminated by signing a non-disclosure declaration and protecting the participant's identity. Observer bias can occur if the data is incorrectly interpreted.

Leedy & Ormrod (2007) mention that depending on the study being done; reliability can take different forms in different situations. These forms are explained and discussed below:

1. **Interrater reliability** – extent to which two or more researchers evaluate the same product or performance give identical judgments
2. **Internal consistency** – extent to which all of the items within a single instrument yield similar results
3. **Equivalent forms reliability** – extent to which two different versions of the same instrument yield similar results
4. **Test-retest reliability** – extent to which a single instrument yields the same results for the same people on two different occasions

Validity according to (Leedy & Ormrod, 2007), “is the extent to which the instrument measures what it is actually intended to measure” (p. 92). Three different types of validity pertinent to this study and mitigating actions are explained below:

1. **Face validity** – the researcher will ensure that the instruments used in this study relate to the questions being asked. To ensure face validity, an initial test was conducted on Janine Everson, who is also an expert in this field. Janine was asked to review the instrument used prior to use in interviews and analysis.

2. **Content validity** – the analysis instrument, a domain analysis worksheet (see Data Analysis Methods), uses a method to elicit semantic relationships between themes. This instrument is one that is typically used in ethnographic studies to analyse and classify different cultures (Leedy & Ormrod, 2007).
3. **Other validity issues**, such as criterion and construct validity, will not likely to have any effect on the outcome of this study. If other validity issues arise during the study, they are captured and addressed in the research report.

In the interest of validity and reliability of data collected, several perspectives are interrogated so as to mitigate the risk of individual bias or poor recall from any particular interviewee. Interviews are conducted with several expert coaches who have “lived” the evolution of IC. Questions remain mostly open-ended with the purpose of eliciting key events, people and theories that have led to the development of the discipline.

3.6. Data Analysis Methods

The process of analysing the collected data underwent a revolution in method through iterations of analysis. The researcher started using “domain analysis” (which Spradley (1979) recommends in such fields as ethnography) as a method to identify key semantic relationships, however this methodology proved far too complex for a report of this nature, and thus a different approach was taken of *narrative analysis*. The main discussion of this report is presented through a narrative from this exercise – discussed in the next section.

Narrative analysis is a qualitative research technique that extracts data from storytelling. “A primary way individuals make sense of experience is by casting it in narrative form” (Bruner 1990; Gee, 1985; Mishler, 1986 as cited in Huberman & Miles, 2002, p.220). First person accounts of respondent experiences are analysed to see how they tell the story, or make sense of events in their lives. “The methodological approach examines the informant’s story and analyses how it is put together, the linguistic and cultural resources it draws on, and how it persuades a listener of authenticity” (Huberman & Miles, 2002, p.218).

Huberman & Miles (2002) claim that as there is no standard set of procedures a researcher may follow, it is necessary to consider how to: a) “facilitate narrative telling in interviews”, b) “transcribe for the purposes at hand” and c) “approach narratives analytically” (p.246)

which the researcher does throughout all interviews. This is essential to creating a context where information that needs to be shared freely, is shared freely. Open questions that encourage topics to be discussed rather than those that request discrete pieces of information are asked.

Huberman & Miles (2002) insist that “taping and transcribing are absolutely essential to narrative analysis” (p.249). The authors suggest that data can only be analysed if recorded and stored in written form. The researcher has thus transcribed all interviews by professional means.

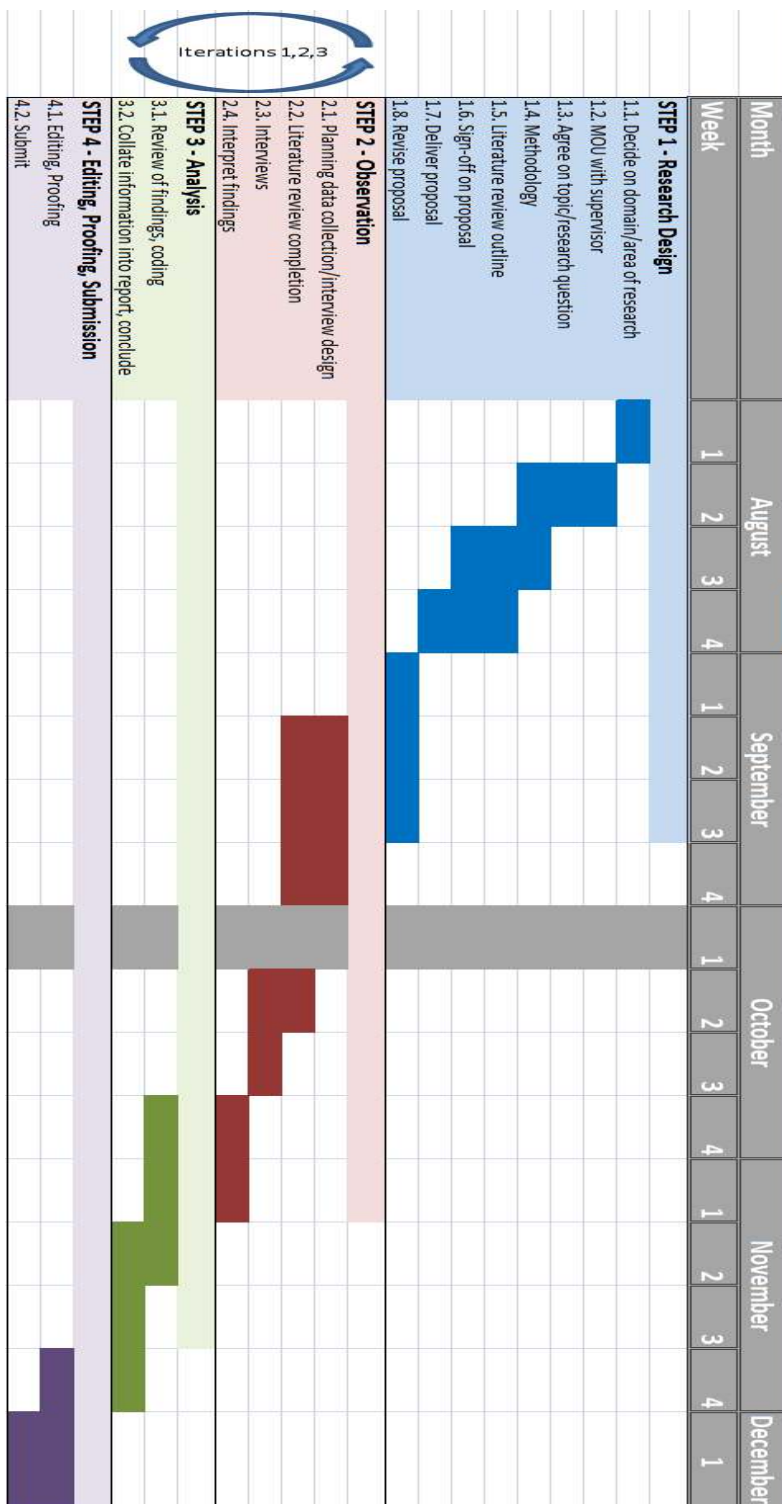
3.7. Conclusion

In his magnum opus, *Being and Time*, Martin Heidegger, the German existential philosopher, stated:

The idea of historiology as a science implies that the disclosure of historical entities is what it has seized upon as its own task. Every science is constituted primarily by thematizing. (Heidegger, 1962, p. 393).

It is from this perspective that the researcher wishes to address the research questions. The literature of the fundamentals of coaching provides a good surface description but it does not tell us how IC, specifically developed or evolved. Substantiated historical evidence should support the theory; however, this activity remains for the data collection and analysis chapters of this report.

3.8. Research Plan



4. Research Findings, Analysis and Discussion

4.1. Research Objective

The questionnaire used to guide the open-ended interviews can be found in the Appendix in section 7.1. From the data collected through interviewing and cross-reference, emerging themes were identified that help to answer the research questions. The research findings are presented through narrative to address these questions, with several key observations being addressed to answer them in the concluding chapter.

4.2. Research Limitations

Firstly, not all invited participants could be interviewed for this study. Particularly, the contributions of Sarita Chawla, who has lent much to the development of IC, could not be interviewed. Sarita has trained as an anthropologist and her knowledge and experience working in the fields of organisational culture, organisational learning and leadership development has brought a great deal to the development of IC and contributed significantly to its history.

Secondly, this report is presented at a particular point in time, and addresses a history that is relevant to its use today. Any conclusions drawn from assessing the historical development of IC do not exclude the potential of the discipline changing as culture and new psychological developments and discoveries continue to influence the discipline into the future.

Thirdly, some errors from transcribing were encountered. At times, audio was poor resulting in guesswork in a small portion of words and phrases in transcripts. No extracts from transcripts have been used when the audio was not of sufficient clarity to understand what was being said.

Finally, Integral Coaching has a deep and rich history. Given the time and resources available for this report, the scope of research has been limited to a particular level of abstraction, which at worst leaves out certain relevant detail, but at best captures the *most* influential events, though-leaders and theory that forms the basis of the discipline.

4.3. The History and Development of Integral Coaching

Flaherty, J. (2011), explains the origins of Integral Coaching as the “coming together of three things”. These origins were, as he describes:

- The Human Potential Movement of the 1960s, and its various contributors, in the USA.
- Developments at an organisation “est” (founded by Werner Erhard) that offered communications and self-empowerment workshops.
- The “grounded” intellectual and philosophical influence of Fernando Flores, ex-finance minister of Chile who had joined est at the invitation of Erhard.

4.3.1. Human Potential Movement

The 1960’s Human Potential Movement in the United States was an attempt to increase public awareness and foster social change (Singh & Salazar, 2010). The movement manifested as groups whose purpose was to raise consciousness and provide liberal space for group members. According to Singh & Salazar (2010, p.100), “group modalities were used to address issues of militarism, racism, sexism, and hetero-sexism.” In his book *Rules for Radicals*, S. Alinsky outlined strategies “for those who want to change the world from what it is to what they believe it should be” (Alinsky, 1971 as cited in Singh & Salazar, 2010, p. 100).

Flaherty, J. (2011) points out that from this movement, California (and in particular the Esalen Institute for humanistic alternative education in Big Sur) became attractive to various psychiatrists and psychologists (such as Fritz Perls and Abraham Maslow), scientists (such as Ida Rolf) and other philosophical thinkers interested in the movement.

4.3.2. Erhard Seminars Training (est)

Inspired by the movement, Werner Erhard founded an organisation in California in 1971 called “Erhard Seminars Training”, abbreviated to “est” (lower-case deliberate) which was also an intentional pun on the Latin verb “to be” (Flaherty, S., 2011). According to Flaherty, est was one of the biggest organisations worldwide offering workshops in “personal development” and “enlightenment”. Est is known today as “Landmark Education”.

What is important from the perspective of history of IC is that the est trainings, at that time, were not grounded in any sort of academic theory or discipline (Flaherty, J., 2011). As Flaherty, who joined est in 1974 and later became a seminar leader, points out in interview, “the roots there were certainly not philosophical; they were the Human Potential Movement. In a way this was anti-intellectual.” In previous dialogue, Flaherty states “the exhortation all the time was get out of your head get out of your head get into your experience get into your body” (Flaherty, J. In Everson, 2011b). Later in the same interview he describes the est weekend workshops as:

A two weekend process that reported to enlighten people in those two weekends. Werner incorporated many different modalities that he had learned from Scientology, from Zen, from Gestalt Therapy and so on into this weekend, these two weekends, it was very “confrontive” and full of emotional pressure, but brought people to a cathartic release that led to lots of loyalty and working with the organisation (Flaherty, J., In Everson, 2011b).

Erhard however, James Flaherty claims (In Everson, 2011b), was smart enough to see the limits of what he was doing. At est, he was “pushing to the edge of what human beings could tolerate” which had negative consequences in some cases, so he wanted to go in a different direction - one that was more mainstream.

4.3.3. Fernando Flores and Conversations for Action

During the coup d'état of Chile in 1973, Fernando Flores, the then-minister of Finance was ousted out of his political position, imprisoned and later sent into exile (March, 2011). Flores then moved to the United States in 1976 and undertook research at Stanford University where he met Terry Winograd known for his work in artificial intelligence and the philosophies of the mind.

It was here where Flores worked together with Winograd on writing *Understanding Computers and Cognition*; a book on the field of organisational design and management (Flores, 2011). Flores' later undertook a PhD in Berkley, California in 1977 where under the

guidance of John Searle, Stuart Dreyfus and Hubert Dreyfus, he authored the doctoral thesis entitled *Comunicación y gestión en la oficina del future*¹ (Flores, 2011).

According to Flaherty, J. (2011), staff at est (that were connected to Erhard) started noticing the work (concerning management) that Flores' was doing. As a result, Erhard brought Flores in to work with his personal staff, and later a professional partnership developed between the Erhard and Flores.

Erhard recognised that Flores had the mainstream, grounded approach he sought, and so they founded a partnership called 'Hermetnet' where Flores would provide workshop content and the product they made available was called "conversations for action" – a workshop which was offered through the network of est's centres throughout the country (Flaherty, J., 2011).

Through his dissertation at Berkley which was presented in 1979 (and funded in part by Erhard), Flores had developed a theory for understanding communication and the role of computers. Based on the Theory of Speech Acts by John Austin and the Theory of Commitments by John Searle, Flores argued that human coordination occurs in what he called *conversaciones para la acción*² (Flores, 2011). Although Speech Act Theory is a large academic field, Flaherty, J. (2011) claims that Flores' workshop content focussed mainly on "requests, promises, assertions and [active] listening".

Their partnership was thus founded on the premise of Werner Erhard gaining from having access to Flores' knowledge of Speech Acts, and an approach to human potential development grounded in rigorous philosophical roots that was lacking in est. Flores then gained equally by having access to Erhard's wider audience (Flaherty, S., 2011) which the researcher posits came from political ambition.

4.4. The Confluence of Analytic and Continental Philosophy

Although the basis for Flores' conversations for action workshops was Speech Act Theory, which is grounded in the analytic philosophy of language, he was also influenced by postmodern continental philosophy, and in particular the works of Martin Heidegger (March, 2011; Flaherty, J., 2011). Flores, according to James Flaherty (2011) was a big reader, and

¹ Translation: Communication and management in the office of the future

² Translation: Conversations for action.

claimed to James to read “fifteen hundred books a year.” James attests in his interview to the fact that not only did Flores’ read so much, but he also “remembers [the books]” and moreover “he remembers everything you say or do” (Flaherty, J., 2011).

One of the more influential books on Flores’ work was Heidegger’s magnum opus, *Being and Time*. The central tenet in this work, according to Steve March (2011) is “to address the question of ‘what the nature of the being is for which being is a concern?’ as Heidegger would frame it. Koschmann, Kuutti & Hickman (1998) alternatively describe the nature of Heidegger’s project in writing *Being and Time* as “to explicate the structure of the commonsensical background shared by all knowing beings.” Heidegger’s work thus inspired the philosophical thinking that different people experience the world in different ways. As Steve March puts it in interview:

One of the big things that Heidegger was up to, and which will probably never be repeated again in the history of philosophy, is that he was active in the very beginning of the project of philosophy back to the pre-Socratics in Greek philosophy. He basically said the whole project started on the wrong foot, at the very beginning the people would ask “what is nature?” They would look at the world around them and say “what is this?”, “what is the nature of this?” They started to speculate and come up with ways of talking about atoms, etc. Their second question was to look at themselves, to say therefore what is the nature of us? The answer to that question on the basis of the language they had developed answered the first question. We became material beings. Heidegger said that philosophy has to be started on the other foot. The first thing you have to do is to ask the question what is the nature of the being for which being is a concern? (March, 2011).

Being and Time and other works of Heidegger take inspiration from several 19th and 20th century authors and draws from several postmodern concepts, however until “the turn” (a shift in Heidegger’s thinking circa 1930 of the relationship between the *Dasein* and *Being* – see section 2.2.1); they remained mostly grounded in continental philosophical thought.

In his works, Heidegger addresses the hermeneutics of Gadamer, Husserl’s phenomenology, as well as concepts of existentialism brought in by Kierkegaard and Sartre. However as Steve

March (2011) points out, “after the turn, Heidegger wrote things like *On the Way to Language*. He wrote *Poetry, Language and Thought*. Those books definitely have influenced Integral Coaching in its interpretation of language.”

March (2011) points out that for a long time, in philosophical circles, the analytic school of philosophy and continental school were largely incompatible. Flores created a pioneering innovation in bringing these philosophies together in a way that worked. Flores claims that “as a Chilean, he didn't know that these two branches of philosophy were considered incompatible” (March, 2011).

The key integration, according to March (2011), is that from Searle's perspective, there are actors (people) who speak back and forth to each other in a way that allows them to construct reality – to make being and co-ordinate action. March points out that from an analytic philosopher's perspective that's an important thing to understand as it provides the rigour required in building arguments.

What Flores noticed, from the Heideggerean perspective, was that each of those speeches has ontology – a certain understanding of being, a certain understanding of who they are and of who is speaking to them. In effect, the integration between the two is recognised within a situation of two people speaking to each other (from the perspective of Speech Act theory), but there are also our “various ontologies or frames of reference – our different structures of interpretation both employed at the same time” (March, 2011).

It was an integral movement that Flores made which was to say that each camp had only part of the truth and that by combining both of those together he was able to recognise more of the truth in every moment and then make a more powerful interpretation and therefore respond in a more powerful way to break down as things that aren't working.

4.5. Flores and Flaherty

James Flaherty joined est in 1974 initially as a guest seminar trainer and later became a seminar leader and as such was asked to attend Fernando's “conversations for action” workshops through Hermenet (Flaherty, J., 2011; Flaherty, J. in Everson, 2011b).

At the end of one of the classes attended by Flaherty, Flores asked for feedback. During this dialogue, Flaherty claims to have suggested Rolfing to Flores – with which Flaherty was familiar having previously studied Rolfing since 1975. Rolfing is a practice whose primary emphasis is structural alignment and integration of the body in the field of gravity (March, 2011).

Flores became interested in learning more about Rolfing, and so a professional relationship developed between Flaherty and Flores in that Flores would learn from Flaherty about Rolfing and Flaherty would conduct errands for Flores one day a week in exchange for private philosophy lessons. Flaherty claims to have received “ten years of philosophical training in 2 years by working for [Flores].” (Flaherty, S., 2011). According to Stacy, this marked the beginning of James’ strong philosophical education for IC.

4.5.1. Integrating Possibility and Relationship

The basis for Flores’ workshops at that time, were conversations for action, which today is still a core focus of the flow of coaching conversation however Flaherty argues that a “conversation for relationship” was missing (Flaherty, J., 2011). Flaherty claims that Flores’ workshops aimed at having people become more skilful through a “narrow band” of being linguistically competent by being able to have conversations to forward action and understand one’s own listening. Conversations to develop “relationships or possibilities” were however missing (Flaherty, J. in Everson, 2011b; Flaherty, J., 2011).

Flaherty recalls being initially influenced by the importance of relationships by an est trainer, Ken Andenter, who was working with Flores when he was getting trained to lead Flores’ workshops. Sarita Chawla (In Everson, 2011b) claims that Ken “started offering communication workshops that developed a whole curriculum around communication.” Flaherty also claims to have taken influence in incorporating conversations for relationship from the humanistic psychology works of Carl Rogers and *I and thou* by Martin Buber (1970).

According to Buber (1970, p.17), “one becomes human only in I-thou relationships, for only these call a person into unique wholeness... as I become I, I say Thou. That is, I become genuinely human with and through Thou.” Buber (1970) essentially makes the distinction that human beings distance each other by communicating with each other through an “I-it”

paradigm. Thus by adopting a subject-to-subject (I-thou) attitude in our communication rather than a subject-to-object (I-it) attitude, we become more aware of each other's entire being rather than perceive each other as "isolated things". Buber (1970) argues that the I-thou relationship is "more of an event and happening in spacelessness and timelessness, always mutual and yielding, and has an interhuman betweenness" (p. 19).

O'Flaherty (2011) confirms this importance of relationship in affirming that establishing a relationship with one's client is the foundation for coaching. O'Flaherty claims that establishing a relationship with one's client allows freedom of expression, trust and the ability to "unload" what the coachee is coming into the session with and to trust that the process is going to "allow the coach to unpack things" (O'Flaherty, 2011).

March (2011) points out that an important distinction that came from Searle and Austin and was also picked up by Wittgenstein is that language isn't only descriptive; it's also "performative". As March states in interview:

Prior to these guys doing their work most people assumed that language was descriptive. We think that what we do, there's a reality that exists and language would describe that reality. It's true, we can say, pass me the book that's to your right. We can do things like describing the reality but when you say, pass me the book; we're not describing anything that exists. We're instead making a request. Language has the capacity for action - to say the language is performative. Language itself is an action and it doesn't describe anything. When we set up the appointment to have this call right now and I said I can meet on this day at this time in the morning I wasn't describing anything that exists, I was making an offer. When you said, that will work in my calendar, let's do it, you weren't describing anything that exists - you were agreeing to my offer which is called making a promise. What we were doing, performative language, was we were saying something, we were inventing a certain future that we would be working together to create... That's the big insight of Speech Act theory into language as performative. That's what we use as coaches where I'm having a conversation with a client, what I want to help the client do is to reinvent their future so that the client sees some new possibility (March, 2011).

Flaherty, J. (2011) states that he put together the constellation of the three conversations, of relationship, possibility and action because “it just seemed obvious.” Today, these three conversations form the fundamental basis for the flow of conversations in Integral Coaching:

- Conversation for relationship (Flaherty ← Buber/Rogers)
- Conversation for possibility (Flaherty/Flores ← Austin/Searle)
- Conversation for action (Flores/Winograd ← Austin/Searle)

4.5.2. From Breakdown to Compassionate Dislodgment

Flaherty, J. (2011) claims that Flores’ way of working with people was that there had to be a “breakdown” for coaching to happen, which Flores got from Heidegger. According to Flaherty:

Heidegger says that we just live moment to moment in a world where we expect everything to work and flow easily and naturally, and if things are flowing along we’re not thinking about anything we’re just dealing with each situation as it happens... In philosophy that’s called the “transparency of the world”... Fernando [Flores]’s mandate was making sure the person has a big breakdown, which would get people to think about how something works or what was wrong (Flaherty, J., 2011).

Koschmann et al. (1998) note that the concept of experiencing a breakdown as a means of revealing the nature of the world around us was not unique to Heidegger or phenomenology. The authors note that Leont’ev (Russian psychologist) and Dewey (American philosopher) seemed to hold convergent views. Koschman et al. (1998, p. 26) define a breakdown in this context as “a disruption in the normal functioning of things forcing the individual to adopt a more reflective or deliberative stance toward ongoing activity.”

O’Flaherty (2011) however, questions the impact of the approach of coming to a breakdown without concern for the individual. O’Flaherty mentions that by asking razor sharp questions thoughtlessly just because it is going to open things up isn’t always what works. Instead, he suggests that allowing “compassion *with* dislodgement” allows the coach to ask tough questions, within a frame of trust. James Flaherty concurs:

We wanted to leave people intact, whole, in a stronger relationship with themselves and the people around them... if we start from there; it does away with some of the innate power-difference that happens in the coaching relationship. It makes it easier for the coach and client to be on the same team without resistance or friction (Flaherty, J., 2011).

4.6. Breakthrough Learning to New Ventures West

Through working as Flores' personal assistant during 1983-1985, Stacy Flaherty claims that the Flores/Erhard partnership did not last (Flaherty, S., 2011) and this is confirmed by James Flaherty (Flaherty, J. In Everson, 2011b).

Flores decided to leave est, bringing an end to Hermenet in 1985. James Flaherty then started working in another consulting company where he met businessman John Hanley who ran a similar organisation to est called "Lifespring". Hanley was also interested in Flores' work, but they were unsuccessful in forming a working relationship and so Hanley, Flaherty and Flaherty's partner at the time, Keith Bailey, co-founded a company called "Breakthrough Learning" which took Speech Act Theory and aimed it at using Lifespring's network of offices around the U.S. to offer classes to business projects (Flaherty, J. in Everson, 2011b).

Breakthrough Learning offered a workshop called "Business Acceleration Training" from 1985-1986 which at that time, although grounded in Speech Act Theory, was not called coaching. James recognised the need to market the business to organisations and corporations and so hired his father Edward B. Flaherty to offer consulting advice for new products that the business could sell. Flaherty, J. (2011) elucidates that it was the conversation with his father that opened up the possibility of selling a "coaching" product. As Flaherty, S. (In Everson, 2011b) states "this is how coaching started".

James Flaherty developed then, the first coaching class, which was 6 months in length. Flaherty, J. (In Everson, 2011b) claims that these classes were done with content in the spirit of Flores' and est and that the assumption was that the "person coming to the training doesn't know anything and has to get straightened out". Sarita Chawla (In Everson, 2011b) describes the experience of that class as "intriguing and painful" yet, she claims, despite some leaving,

she kept coming back as through the process she saw things about herself that no one else had pointed out to her.

The classes offered through Breakthrough Learning were done in New York and San Francisco. John Hanley, who owned 51% of the company decided however, according to Flaherty, J. (In Everson, 2011b; Flaherty, J., 2011), to end the partnership and have James work directly for LifeSpring which James declined. The organisation was thus dissolved, however in negotiating the dissolution, James retained the intellectual property rights to the coaching class (which Hanley was not interested in) and started his own organisation, New Ventures West (NVW), based in California (Flaherty, S., In Everson, 2011b).

One of the first partners to work with James was Sarita Chawla, in 1987, who unfortunately could not be interviewed for this report. Sarita, an anthropologist by profession, joined NVW after working previously for Pacific Bell (now AT&T) and LifeSpring. Flaherty, S. (2011) claims she was “an enrolment machine” providing NVW with a source of clientele from her professional networks that provided the initial cash flow to establish NVW. Since then, NVW has flourished, with James Flaherty having led his 42nd PCC class this year (2011).

4.6.1. Academic Grounding

James Flaherty recalls Flores questioning the academic grounding for the approach of Erhard’s est work. Erhard offered classes to enlighten students through realising that “their experience is all there is” (Flaherty, S., In Everson, 2011b). Flaherty, J. (In Everson, 2011b) claims that our “ability to listen and our ability to feel what is possible” is affected by mood – a concept supported by the human potential movement, however without any academic grounding.

The content of the NVW coaching classes at the time, according to Flaherty, J. (In Everson, 2011b) differed to est or Lifespring trainings in that it did have academic roots. According to Chawla (In Everson, 2011b), “[Flores] brought in Solomon’s work with emotions and he brought in Maturana the cognition of biology, and Heidegger” with respect to providing the academic rigor to support this theory.

In doing so, Stacy Flaherty (In Everson, 2011b) claims that the concept of structure of interpretation was introduced, in academic theory, to explain how we all experience the world

differently – a concept believed firmly in est, Lifespring and proponents of the Human Potential Movement.

Solomon (1993) proposes that we use emotions to judge the world. In *The Passions: Emotions and meaning of life*, the author claims that it is our emotions as judgements which “structure the world to our purposes, carve out a universe in our own terms, measure the facts of Reality, and ultimately ‘constitute’ not only our world but ourselves” (p. xvii). Solomon devises a theory in his work that describes the emotions as “strategies” – purposive attempts to structure our world in such a way to maximise our sense of dignity and self-esteem (Solomon, 1993). Solomon argues that the emotions are not what distort our reality, but rather that they are entirely responsible for it.

Flaherty, J. (2011) claims that Solomon’s idea of emotions as strategies was inherited from Jean-Paul Sartre (a mid-20th century philosopher). One of Sartre’s main tenets, according to Flaherty, was that emotions have a strategy – that we’re “up to something in what we’re feeling” and Sartre makes that quite explicit.

In addition to the academic theories of emotion and mood influencing the development of IC, particularly with regards to the biological basis for one’s structure of interpretation, Flaherty, J. (2011) states that he was also influenced by Humberto Maturana and Francisco Varela in their works such as *Autopoiesis and Cognition* and *The Tree of Knowledge*.

In 1965, Maturana conducted several experiments in human and animal colour vision. Maturana’s findings from these experiments led him to conclude that the nervous system (the body) does not operate as a detector of wavelengths to define colour, but that any given colour is a relationship of neural activity. Maturana thus put forward the idea that the nervous system cannot distinguish illusion from perception (Hayles, 1999, as cited in Hallowell, 2009). In other studies, following Maturana’s Ph.D. dissertation on the neurophysiology of the frog:

He demonstrated with great elegance, that the frog’s visual system does not so much *represent* reality as *construct* it. What’s true for frogs must also hold for humans, for

there's no reason to believe that the human neural system is uniquely constructed to show the world as it "really" is (Hayles, 1999, as cited in Hallowell, 2009).

Flaherty, J. (2011) claims further that Maturana and Varela, in *Autopoiesis and Cognition*, argue that language and consciousness arise together, and as March (2011) states "they see language and culture as a biological phenomenon" – that the biological make-up of people is fundamental even to language.

The relevance to the world of coaching here is that the coachee is limited only by how they observe their world, and that any problems or solutions exist within what they believe is possible through their structure of interpretation which in turn is determined not by the objective world, but how it is interpreted and experienced within the body.

According to Varela (1999), their work on embodied cognition drew many of the same conclusions as Heidegger in understanding cognition through existentialism. As Flaherty points out:

The thing that is important about Heidegger is his idea that we are not any particular way until we take up with our culture and our culture shifts us, makes us into the person that we are. And that this radical notion of Heidegger's is ... doing away with the separation between inside and outside. The point of Maturana's is [that] he grounds all that in the body, so it isn't just an idea (Flaherty, J., In Everson, 2011b).

March (2011) explains Varela and Maturana's influence further:

What you find when you read Maturana and Varela's work (if you know Heidegger's work), is that it sounds like they're [saying that] our "way of our being" is *created* by "our way of doing". The really big concepts in their work, is that human beings are structurally determined systems.

What March means by "structurally determined systems" is that we require an interface to interact with the world, and that the world must match our structurally determined interface to

interact with us. Our structure thus, Maturana claims (according to March, 2011), determines the kind of world that we see and the kind of interactions that are possible in our world.

As March (2011) elucidates:

The way it works is that we as structurally determined systems and other beings as structurally determined systems and other objects as structures, all cohabitate and live together over time. We start to create a way of interacting with each other that they called structural coupling. It's like we grow together, just like a tree will grow around a metal fence post that is nearby it as it gets bigger. These two things become – they're still separate but their structures become integrated. They fit one another and if you were to take the metal fence post out and look at the hole that's left it would be an exact mould, an exact fit of the fence post. The great insight to this that we use in Integral Coaching is that if we're going to shift the *way of being* of a person, [then] we have to shift their *structure*.

March continues to explain that in order to shift one's structure, the coach has to work with everything in life with which that person is structurally coupled. He gives the example of trying to shift a coachee's structure, without attending to their relationships. If the coach then doesn't attend to the other things that grow and mould themselves around their existing structure, March (2011) claims, then trying to build a different structure will be undermined by the current structural coupling.

4.6.2. Integrating Ethics, Vocation and Spirituality

March (2011) alleges that Flores was concerned with conversations and power – that the depths of Flores' work involved becoming more powerful through language. However, in the absence of an ethical or spiritual dimension, March (2011) claims, what this develops at the same time is the potential for a manipulative way of being.

Flaherty, J. (In Everson, 2011b) describes a shift in his approach that came about from his an experience during a retreat to the San Francisco Zen Centre where a long-time Zen teacher, through an act of compassion showed Flaherty that “love was way more powerful than fear is” which was not what Flaherty had been accustomed to at est or through Flores' workshops. While describing Flores' coaching style, Flaherty, J. (In Everson, 2011b) notes:

The explicit point of their work was to be powerful in the world which meant more than anything [that] having ... power was getting what you wanted. But what was always missing for me in that was the ethical dimension ... what effect is your *being powerful* having on the community? And can everybody be powerful in the same way?

Flaherty, J. (In Everson, 2011b) notes that his personal spiritual influence began in high school through exposure to Christian traditions through Jesuit training and the spiritual exercises of Saint Ignatius - the heart of which is the “disarmament of spirits”. Flaherty describes this as a way of quieting oneself and getting an “internal feel” and an “internal taste” for what that vocational calling is. Although there is no academic grounding for this (which Flaherty attests to), other spiritual philosophies such as Buddhism advocate the process of “sitting” or “zazen” – a meditative discipline intended to calm the body and mind with the purpose of developing internal insight.

Jon Kabat-Zinn, founding member of the Cambridge Zen Centre, teaches through yoga and Buddhist studies “mindfulness meditation” as a technique to remain “present” in helping cope with stress, anxiety, pain and illness. He maintains that non-judgemental awareness is cultivated by paying attention “in the moment” and that this can be practiced through meditation. The purpose of this activity is to bring the body-mind into balance with itself and in doing so, heightened levels of awareness result which empower one to unlock or unblock or liberate factors (psychological or physiological) which inhibit clarity of mind-body that impedes functionality (Kabat-Zinn, 1997).

The notion of vocation, Flaherty (In Everson, 2011b) states, came from Christian influence. March (2011) claims that in addition to cultivating one’s ability to act in a powerful way and simultaneously cultivate oneself spiritually, what one must recognise is that power “isn’t for you, it’s for others - it’s for serving people in the world.” These ideas stem also from Buddhism and Zen Buddhism in particular, and so as March (2011) points out, spiritual development is a big emphasis.

Two other influential concepts Flaherty describes (In Everson, 2011b) are the Jesuit's "openness to questioning ... to stay open ... and see things from many different disciplines." to include all and to take spirituality "out into the world." Flaherty (2011) claims that what makes IC as a discipline distinct is remaining open to be influenced, unlike other schools which, in his perspective, have a too-narrow aperture to the world (he gives the example of some coaching schools having a primary focus on Ken Wilber's work, almost to the exclusion of other influences).

The point of this, Flaherty (In Everson, 2011b) makes, is one of practicality. Flaherty claims that what Integral coaches do is continuously ask the question of what it is that anybody has learned from any tradition which is practically *useful* for the development of their clients, and is accessible in a way that we can be brought forth.

Meaning, Learning and Spirituality

Tisdell (2003) argues that spirituality is one of the ways in which people construct knowledge and meaning. In *Exploring spirituality and culture in adult and higher education*, Tisdell (2003) notes that spirituality "works in consort with the affective, the rational or cognitive, and the unconscious and symbolic domains" (p. 20). The author, drawing on the contributions in the field from Fowler, Piaget and Kohlberg claims that learning and constructing knowledge is not only derived from rationality, but also that it is embedded in people's growth, development and in new experiences. "Knowledge construction takes place in the workplace, in relationships, in therapeutic contexts, and in somatic learning contexts such as Tai Chi, exercise programs, or yoga" (Tisdell, 2003, p. ix).

Tisdell (2003) works with the assumption that spirituality should not be understood as the same thing as religion (she is explicit that they are not the same) but rather that spirituality should be understood as "an awareness and honouring of wholeness and the interconnectedness of all things through the mystery of what many refer to as a Life Force, God, higher power, higher self, cosmic-energy, Buddha nature, or Great Spirit" and that "spirituality is about how people construct knowledge through largely unconscious and symbolic processes often made in concrete forms such as music, image, symbol, and ritual", all of which are manifested culturally" (p. xi).

Although IC is not affiliated with any denominated religion (March, 2011), spirituality forms a big emphasis, because finding meaning is one of the ways in how humans develop through learning. Spirituality thus, as does *practicality* or *usefulness*, provides meaning in new learning, which is essential to development as Tisdell argues.

4.6.3. Psychology and Practicality

Flaherty, J. (In Everson, 2011b) notes that the works of Medard Boss, particularly *Psychoanalysis and Dasein Analysis* and *Existential foundations of medicine and psychology* published in 1963 and 1979 respectively were influential in the further development of IC.

Flaherty, J. (In Everson, 2011b) claims that Boss was a physician that was analysed by Sigmund Freud, neighbours with Carl Jung and friends with Heidegger. According to Flaherty, Boss “re-understood human beings in terms of Heidegger instead of understanding human beings in terms of Freud”. Boss understood humans as “meaning-making beings” and that their “world is brought forth in language, and that time and death affect them; he worked with them in a different way”, he explains.

March (In Everson, 2011b) adds that Boss kept finding (as a Western physician) that doctors wanted to treat physical bodies and not human beings. Boss’ insight, March claims, is that his work started with the premise of how to treat human beings and then build medicine from that, instead of how to treat a body. This was a distinction that unfolded in his analysis. Flaherty, J. (In Everson, 2011b) claims, in this spirit, that IC coaches are distinguished from other coaching schools as “Dasein coaches” incorporating this approach borrowed from Boss’ insight.

Flaherty, J. (2011) expounds the influence of Ken Wilber, the American developmental psychologist. Flaherty (2011) claims however, that Wilber, in developing the AQAL model (see section 2.5.1) was influenced by Jürgen Habermas, the German sociologist and philosopher who developed the “I-we-it” model which divides the world into three elements – that of “me”, that of the “social world” and that of the world of “it”. Wilber, claims Flaherty (2011) divided the “it” into two parts (the singular and the collective) which for several years, Flaherty claims, was referred to in IC as “the four quadrants” which caused confusion between the work done by Ken, and that done in IC. The model was first used in the first Professional Coaching Course designed by Flaherty which graduated in 1999. Since circa

2005, Flaherty (2011) claims the model has been referred to as “the four human domains” in IC.

In addition to the four domains, Wilber refers also to the integration of several “domains of human intelligence” including the cognitive, ethical, aesthetic, spiritual, kinaesthetic, affective, musical, spatial, logical-mathematical, and karmic (Wilber, 1996). According to this model, one can be highly cognitively developed without being morally developed however he acknowledges that one cannot be highly morally developed without pre-requisite cognitive development so not all of the developmental lines are ontologically equivalent (Wilber, 2000a).

March (2011) explains that for the sake of practicality, IC coaches work with six stream of such competence, namely the cognitive, emotional, somatic, spiritual, relational and integrating. Similarly, when working with the four human domains on ten ways, March (2011) explains:

One can enumerate many, many facets of the human condition, hundreds of facets, but to create methodology that would ask coaches to look at their clients, a hundred different directions in one. There’s a pragmatic constraint that we’re always working with here. How can we simultaneously work with more of the whole person but do so in a way that has economy and practicality to it? I think that’s part of the elegance of integral design that we’ve arrived with this methodology that looks at the four human domains, the six streams of competence and the ten ways of being.

Continuing with the theme of practicality, March (2011) and Flaherty, J. (2011) both mention psychologist Carl Rogers whose work in *Client-centred Therapy* stresses the importance of creating a shift in the world of the client as opposed to having more powerful interpretations of the client. As March (2011) states in interview, “we have our own assessment models ... but in a way that doesn't matter; what matters is what happens for the client.”

4.7. International Reach (Canada, South Africa, UK, Singapore, Denmark)

In 1999, O’Flaherty (2011) recalls having a vocational calling to do coaching work during a period where he provided assistance and guidance to a Chief Electoral Officer in South

Africa. O’Flaherty looked around to top coaching schools and resonated mostly with James Flaherty and New Ventures West. After becoming emerged in the philosophy of IC, O’Flaherty (2011) reports wanting to “bring this to Africa.” Following, the success of IC in the US, Flaherty’s vision, according to Everson (2011a) was to take IC internationally, and so a partnership developed.

O’Flaherty then, in December 2001, in collaboration with the Graduate School of Business (GSB) in Cape Town, South Africa, opened the *Centre for Coaching* and was licensed initially, through NVW, to offer the 6 month *Coaching to Excellence* IC course (Everson, 2011; O’Flaherty, 2011).

In the year following, O’Flaherty enrolled in the PCC offered (at that time) only by NVW and became a certified PCC leader, after which time the *Professional Coaching Course* was offered in South Africa. Janine Everson became one of O’Flaherty’s case-study when he took the course in California (Everson, 2011a).

Similarly, two other PCC graduates, Charles Brassard and Pamela Pritchard, started an organisation offering courses in Integral Coaching called *Convivium* (in Canada) under the licensing of NVW (Everson, 2011a). Everson (2011a) notes that IC has spread to other countries like the United Kingdom, Singapore and Denmark.

4.7.1. Adult Learning

As Janine Everson, the Academic Director of the *Centre for Coaching* in South Africa explains:

It was [Craig’s] idea to approach the GSB and mention that if the school wanted to become in the forefront of executive education, then they should collaborate ... Part of my mandate as the Academic Director and part of our mandate in terms of the centres credibility and worth to the GSB is that we supply a stream of credible research, both for the benefit of coaching in general, but also to the GSB. Part of that, in those days (10 years ago) there was even less credible research on coaching than there is now (credible research) so we said, we’ve got to find a credible academic root for what James does and why it works (Everson, 2011a).

Since the GSB is a teaching institution, Everson (2011a) reports wanting to find a way to explain coaching and how to work with people, not only on a 1-on-1 basis, but also how to teach others how to coach, in a way that makes sense and is accessible to business audiences. As a result, Everson and O’Flaherty started researching adult learning and action learning. In doing so, Everson (2011a) claims, they “realised that there was alignment and a big overlap between what coaches do and how adults learn and what adult learning theory says” (see section 0 for a literature review of Adult Learning).

As Everson (2011a) elucidates:

I don’t think [James Flaherty] studied teaching methodologies as such. It just so happens, that because of that wisdom and philosophy, he has aligned the way in which he teaches to his audience which are adults.

The *Centre for Coaching* thus, has provided rigorous theory from the perspective of Adult Learning for the discipline of IC, which Everson (2011a) points out, is relevant given that most clients who are coached are adults.

4.8. Integrating Somatics and Structural Determinisms of Behaviour

Steven March, who studied with Maturana, Flores and Richard Strozzi-Heckler of the Strozzi institute, is an expert of somatic bodywork. March graduated from the PCC class at NVW in 2002. March was led to NVW after having read James Flaherty’s *Coaching: Evoking Excellence in Others*, suggested to him by a member of an Integral Theory book study group in 2000.

According to March (2011), somatics is the study of the “soma”, which can be understood as “the body as a living field of experience” As March (2011) explains, “you don’t get emotions without a body, you don’t get thoughts without a body, you don’t get relationships without a body, you don’t get spirituality without a body.”

Although *emotional intelligence* is a generally accepted notion and according to Boyatis and Goleman (2002, as cited in Moon, 2010) is even measureable, *somatic intelligence* is less widely recognised (March, 2011).

The work of Strozzi-Heckler according to March (2011) has been to bring somatic intelligence more into the mainstream. The Strozzi Institute, founded in the nineties, offers courses in embodied leadership to help develop the “body” of leaders. March went there because he assumed that there was some shared philosophical background between Flaherty’s approach, Flores’ approach and Strozzi-Heckler’s approach (Flores and Strozzi-Heckler had studied previously with Flores) (March, 2011).

After having attended the institute however, March (2011) believes that they weren’t teaching *coaching* and so when he returned to NVW as a leader-in-training, March claims he wanted to create a class that would teach the somatic stream. What has resulted is the articulation of an overarching and generic methodology that includes work in all streams of competence. It is from this work, March (2011) claims, that the current day PCC has been derived.

Flaherty, J. (2011) concurrently stresses the importance of the body in IC. Trained as a Rolfer since 1975, Flaherty describes Ida Rolf’s premise of Rolfing in that “[body] structure determines behaviour”. Thus by allowing shifts in body position, or structural manipulation of form (as is done in Rolfing and other practices), Flaherty, J. (2011) claims that the shape and structure of one’s body can determine what is possible for them.

O’Flaherty (2011) elucidates however, that Rolfing is not a prescriptive part of the IC discipline, thereby reinforcing the practical notions of IC. O’Flaherty instead suggests that Rolfing is just a possible course of somatic action that a coach can invite their client to experience in the pursuit of creating a shift in discovering new possibilities.

Chawla (In Everson, 2011b) suggests that the notion of structure determining behaviour is something that is used in the language of systems, while O’Flaherty (In Everson, 2011b) recalls Maturana as also concluding that structure determines behaviour.

Presence

Flaherty (2011) describes *presence* as being an important consideration of the somatic stream. As he explains, presence includes the past, and the future and that the present moment always includes both. Presence, Flaherty states is, “a kind of deep openness, and readiness to respond to what arises.”

4.9. Synthesis

The findings from all interviews, group discussions and reviews of referenced literature have been captured visually in an entity-relationship diagram show in Figure 7 below.³

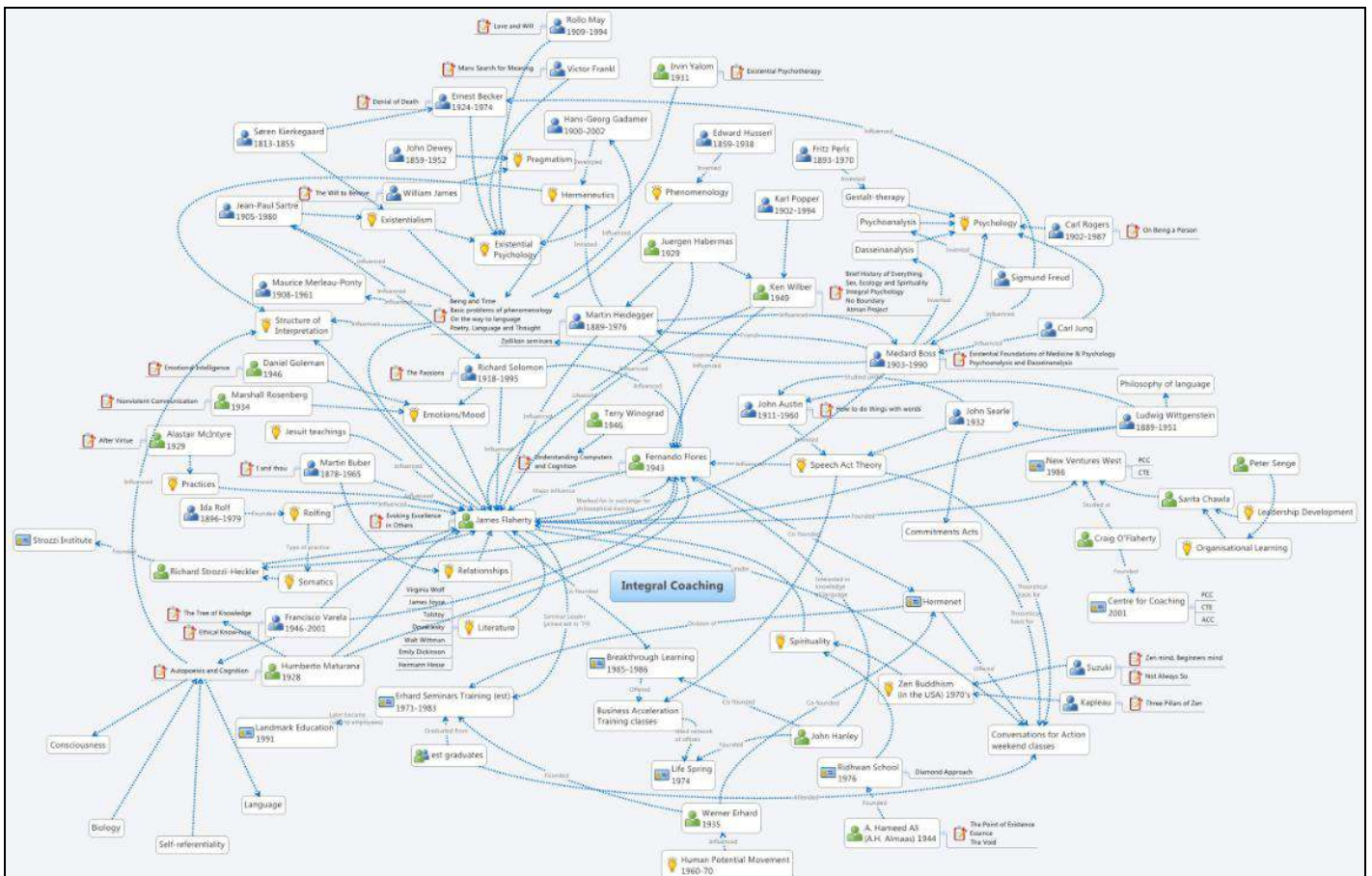


Figure 7: Relational map of concepts, events and thought-leaders informing IC

Although not all aspects of this model are discussed in the findings, the most relevant and referred influences are summarised in the observations in the concluding chapter that follows.

³ Detail is impaired through the size constraints of the page. A more detailed view is available in Appendix 7.

5. Research Conclusions

The process of inductive inquiry through the narrative of the historiographical process presented as findings in section 4.3 has revealed several key themes that the researcher has categorised into observations below. These are used to provide knowledge to answer the questions set out in the research problem description in section 0.

5.1. Observations

5.1.1. Observation # 1: The synthesis of Integral Coaching's history summarised

The primary observation of the researcher is captured in a synthesis of the historical events, social phenomena, circumstances, thought-leaders and academic grounding that gave rise to Integral Coaching. The discipline is grounded in a confluence of analytic and continental Western philosophies, Eastern spiritual philosophies, biology and developmental psychology.

This synthesis is illustrated in detail in the Appendix in section 7.8, but for the sake of clarity a model of understanding is abstracted in Figure 8 below⁴ and described in the paragraphs following (the colour of the descriptive heading relates to the colour of the model referred in the figure):

⁴ The researcher acknowledges that this model lacks detail; however this is intentional. In order for a practical depiction of history to be portrayed, only the key influences are shown here.

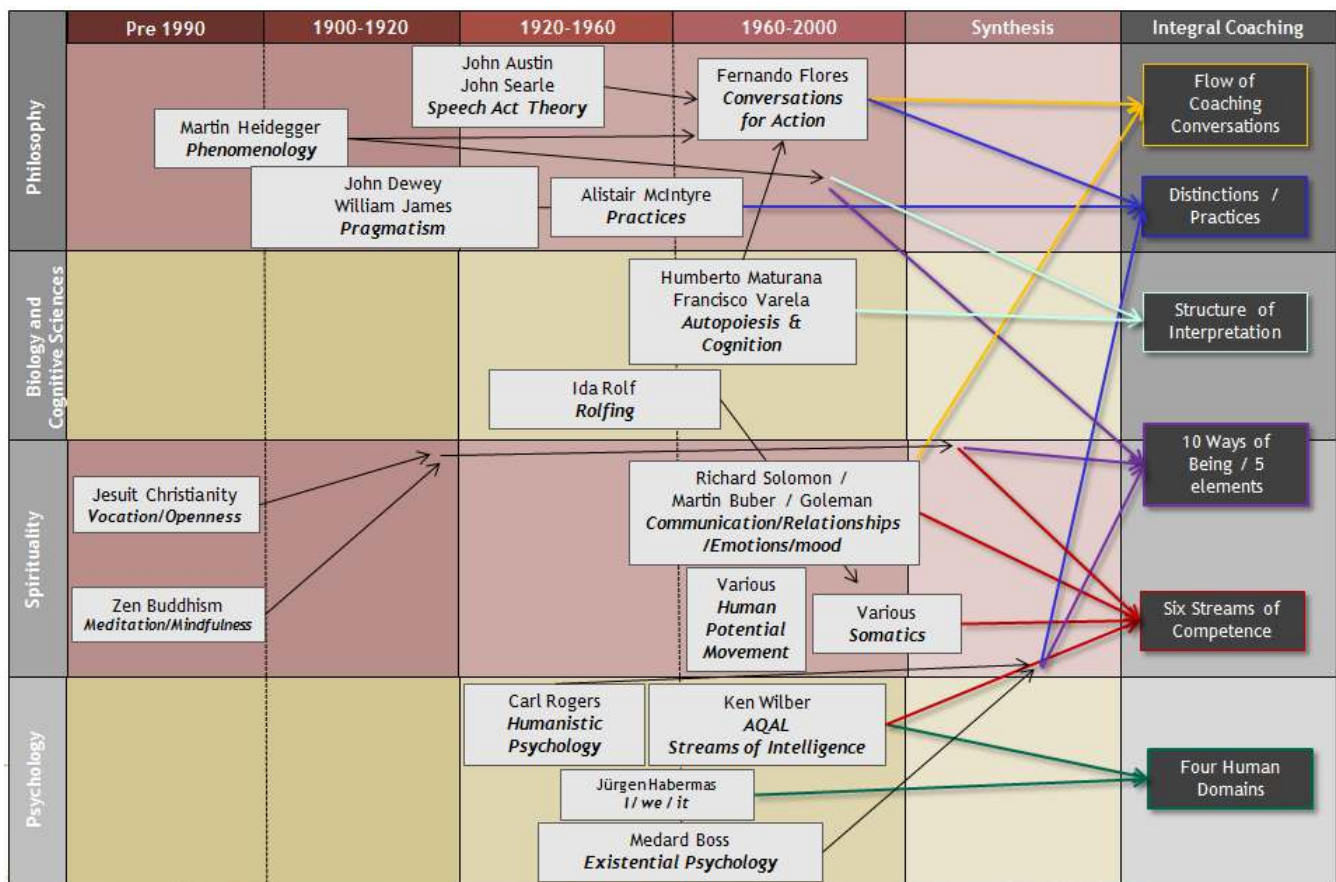


Figure 8: Timeline of Assessment and Developmental Model Primary Influencers

Flow of coaching conversions

- Flores' work with Winograd and his doctoral thesis (largely based on Searle and Austin's Speech Act Theories) reveals a methodology for forwarding action through language. *Conversations for Action* workshops are offered through Hermetnet – a joint venture with Werner Erhard of est who was inspired by the Human Potential Movement of the 60s and 70s. The workshops are mainly about developing power and competence through use of language.
- Flaherty forms a partnership to found *Breakthrough Learning* selling *Business Acceleration Training* programmes. After dissolution of the business, a consulting intervention from Flaherty's father leads to Flaherty selling *coaching* classes. Flaherty is exposed to Flores and influenced by his work, but feels that possibility and relationship are missing from *Conversations for Action*. Conversations for possibility and relationship are inspired from the works of Robert Solomon and Martin Buber, among others and incorporated into Flaherty's classes as the *Flow of Coaching Conversations*.

- *Flow of Coaching Conversations* is used to (1) establish trust with a client that allows honesty and authenticity, (2) allows clients to see new possibilities through offering distinctions through narratives (3) creates a dialogue that invites the required action to bring about change.

Structure of Interpretation

- Chilean biologists Maturana and Varela come to the same conclusions through empirical neurobiology tests as Heidegger did through phenomenology: that our experiences of the world determine our reality, and thus our nervous system (or body) structure determines behaviour. Flaherty, among other influences, synthesises this in a model called SOI or “structure of interpretation”.
- *Structure of Interpretation* is used as a model to describe how language and practices affect one’s interpretation of the world, which in turns, drives behaviour.

Distinctions / Practices

- Flaherty is influenced by the works of Medard Boss and Carl Rogers in Existential and Humanistic Psychology, and the pragmatism of Dewey and James and the use of practices of MacIntyre, among others. Heidegger’s work is also influential, in revealing that people’s SOI are shifted through *dislodgement* or *higher self-awareness*, and that we live our lives in experience (phenomenology).
- The notion/concept of *Distinctions* is used as a method for creating a shift in SOI that can reveal new possibilities for the client. Reflection through *Practices* that raise self-awareness is key.

Five Elements and Ten Ways

- Heidegger and his magnum opus *Being and Time* are influential in the development of the **five elements** used as an assessment model in the CTE course. Solomon’s work on mood is also influential.
- Zen teachings, the writings of Hameed Ali Almaas, Norman Fischer, Philip Kapleau and other spiritual influences and literature, influenced the development of the lower ways in the **ten ways** developmental model.
- The upper **ten ways** are influenced variously: vocation (Jesuit teachings), power (Flores and other influences), immediate concerns (Heidegger), and conversations (Flores, Searle, and Heidegger) and balance (observations of Flaherty).
- Ernest Becker’s work in *Denial of Death* is influential in the final way.

- The *Ten Ways of Being* is developed as a model to provide a way for coaches to coach at the appropriate depth and complexity for the level of development that the client is at (Flaherty, 2005; Flaherty, 2011).

Six Streams of Competence

- Flaherty is commissioned by PriceWaterhouseCoopers to develop competency models for a leadership programme.
- Ken Wilber's multiple domains of intelligence are influential but Flaherty simplifies them at a higher level of abstraction into a model that is practical and memorable for coaches.
- The stream of competence model take further influence:
 - a. Spiritual stream takes influence from Flaherty's "shift" from Zen retreat, among other spiritual influences (e.g. Jesuit upbringing, and the Ridhwan School and writings of Almaas).
 - b. Emotional stream is influenced by Solomon's work in *The Passions* on mood, among others.
 - c. Somatic stream is influenced from the experiences in Rolfing and relationship with Strozzi-Heckler, among others.
 - d. Relational stream is influenced by Martin Buber, among others.

Four Human Domains

- Jürgen Habermas's "I / we / it" model was influential to Flaherty as it was to Ken Wilber's work in developing the AQAL model. Flaherty takes inspiration from both in developing the four human domains, however simplifies it, again for the sake of practicality in coaching.

Key events are summarised in Table 2 below. Details of each event can be found in the corresponding section indicated in the right-most column:

Year	Event	Section in Findings
1960s	Human Potential Movement.	4.3.1.
1970	First english translation of Sein und Zeit (Being and Time).	
1971	est is Founded by Werner Erhard.	4.3.2.
	Fernando Flores becomes political prisoner.	
1973	His reflections led to communication and linguistic theory.	4.3.3.
1974	James Flaherty joins est and takes training	4.5.
1975	James Flaherty starts Rolphing (a modality at est)	4.5.
1976	Amnesty International negotiate Flores' release.	4.3.3.
1979	Flores presents doctoral thesis in Berkley	4.3.3.
1983	James Flaherty starts teaching Flores' workshops	4.5.1.
1985	Flores/Erhard split; Hermetet closes	4.6.
1986	<i>Break Through Learning</i> founded (Flaherty/Bailey/Hanley)	4.6.
1987	First coaching class - basic model of SOI leads to behaviour is used	4.6.
1987	Sarita Chawla took first coaching class and begins instense study of the methodology	4.6.
1990	Flaherty starts classes at Zen Centre	4.6.2.
1994	PCC established by Flaherty at NVW	7.3.
1999	Sarita joins PCC faculty	7.3.
1999	NVW teaches first PCC in Canada	7.3.
1999	Flores stops coaching classes in favour of political ambitions	4.3.3.
2001	First published use of the term "Integral Coaching"	7.2.
2001	CFC opened in Cape Town (GSB) in December (licensed to run CTE until 2004)	4.7.
2003	6 Streams of competence used as an assesment model	7.2.
2004	First ACC run in SA	7.3.
2005 (approx)	4 human domains used as assessment model (previously called quadrants)	4.6.3.
2005	First year PCC run in South Africa	4.7.
	"Assessment, distinction and enrollment" become	
2008	"Current narrative and invitation to new narrative"	7.2.
2008	First Candian PCC	
2009	First Singapore PCC	4.7.
2010	First London PCC	4.7.

Table 2: Timeline of key events influencing IC development

5.1.2. Observation # 2: IC is a dynamic, open, evolutionary process with a core concern of shifting perspective in the pursuit of competency development.

Although the major purpose and objectives of Integral Coaching (i.e. the products of IC, see section 2.1.1) have remained relatively stable throughout its history, the assessment models used, methods of conversation, and other processes employed in the discipline have evolved significantly over time.

The researcher hypothesises, based on the findings that as the academic corpus of global knowledge and understanding of the spirituality, cognition, somatics, language and adult & experiential learning of human beings evolves and expands, so will new methods become available to IC practitioners to better facilitate shifts in their clients' structures of interpretation and forward action that leads to sustainable self-correcting and self-generative excellence.

The respondents to the research inquiry hold an ostensibly unified view that the uniqueness of every coach has an impact on their coaching style. The key learning is that coaches use what they know and experience, not only from their training, but from developing themselves in a way that enables the access of innate intelligences in guiding coaching programmes for clients, in order that clients may continue to *help themselves* after a coaching intervention.

5.1.3. Observation # 3: IC is distinctly non-prescriptive, using grounded models to facilitate coaches, and not to typecast coachees.

Studies of prescriptive techniques (e.g. eye accessing cues in Neuro Linguistic Programming) that assume all people exhibit unwavering behavioural characteristics independent of their unique structures, have received much criticism (Heap, 1988). The *map*, as Integral Coaches will explain, is not the *territory*. Integral Coaching is about what works for the coachee. It is clear to the researcher, through examining IC's history that the discipline has evolved to support what works *for the client* as new knowledge and theories in understanding humans have become available.

The various models used to assess a clients relationship to themselves, others and the world; their way of being in the world; or their existing cognitive, relational, spiritual, somatic or emotional competencies are tools used to facilitate coaches in designing programmes to initiate desired change. They are not for use in typecasting clients in a “diagnostic” spirit and then prescribing related courses of corrective action.

As Flaherty points out in his unpublished notes on Integral Coaching, the models used in IC give “labels that result from a particular analytical process. The process distorts and limits the true reality and possibilities inherent in the person. They have the advantage of being convenient and facilitating conversation.” (Everson, J., personal communication, 28 November, 2011).

This distinction differentiates *Integral* Coaching from other styles, in that (1) IC is open to any influence, tradition, culture or method that works for its clients and does not rely on any one core central methodology (as many do) while (2) Integral Coaching is still grounded in academic theory and philosophy.

The focus in Integral Coaching is on competence and personal development; how the client gets there is up to them – the models are used to provide an assessment and offer distinctions (or new narratives) with the intention of compassionate dislodgement that may reveal new possibilities that will move the client into a new narrative based on their own reflection.

5.2. Answering the Research Questions

The researcher, having provided substantive depth of investigation to the problem area (a lack of recorded history of the discipline of IC) returns to the research questions:

Question 1: *How did IC develop, or evolve? How does the history of the phenomena provide meaning?*

IC developed and evolved according to the findings in section 4 and summarised description in Observation #1. This history provides an understanding and context as to how the models and processes of IC used came to be.

Question 2: *What are its key attributes and relational concepts that allow it to be represented in a model of understanding?*

The historical model of understanding and key attributes is elaborated through the findings and abstracted and simplified in Observation #1. This model is developed from a robust process of historiographic interrogation.

Question 3: *What are the key concepts in IC?*

The researcher claims that the key concepts in IC come from a thorough understanding of human beings; That in order to coach people how to become self-generating, self-correcting and excellent in the long-term, coaches must work compassionately in creating shifts in their client's structure (of interpretation) of the world that will allow them to envisage and self-manifest new possibilities in their lives. In doing so, new competencies can be integratively developed across all streams of competence that will allow clients to descend from their current *Way of Being* into the true nature of themselves.

Question 4: *Is there substantiated evidence to provide support for the theory?*

Yes. The researcher has reviewed over 10.5 hours of dialogue and discussion (presented as transcriptions in the appendices of this report) which were used as evidence to support the claims made in the findings. Although the depth and complexity extends beyond what can be captured within the confines of a limited budget and imposed word count, the researcher feels that the main emerging themes have been conveyed to provide understanding.

5.3. Future Research

The researcher recommends three key areas that would be of value to future knowledge generation in the field:

1. The contextual factors necessary to enable people to deliver coacher training programmes.

This research would help IC trainers develop better programmes to train coaches. What is it that makes someone “ready” or “sufficiently developed” to deliver IC coacher training? Can this be tested for? What would the criteria be to measure this? Further research into adult and experiential learning could provide helpful insights. The researcher cannot find evidence of such research already done.

2. How does IC help organisations specifically?

How do the products of coaching enable organisations to get more out of their workforce? Do IC interventions lead to higher morale? How does being more somatically, spiritually, or cognitively competent lead to better performance? How does developing one’s *Way of Being* to freedom from suffering translate to more ethical business practices, etc? Developing robust case studies for the effectiveness of IC in the workplace would provide substantiated grounds for its use in business. The researcher cannot find evidence of such research already done.

3. How can IC be used to accelerate black empowerment and leadership programmes?

There is a critical need in South Africa to up-skill black economic empowerment (BEE) workers through leadership and development programmes in South Africa. The researcher hypothesises that Integral Coaching could be aligned with the requirements of many large South African enterprises who have a vested interest in competency development in their previously disadvantaged workforce who have lacked formal quality education yet are needed in positions of leadership to comply with BEE regulations.

An evidence-based report into the effectiveness of Integral Coaching in such a context could provide great value to such organisations.

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7. Annexures

7.1. Appendix 1 – Interview Question Guide

The questions below are to act as a guide for data collection. There is no need necessarily to go through each point in the order they are listed below; however an effort has been made to attempt to keep events and ideas somewhat chronological.

1. In your own words, please recount the following events as they relate to your experience where relevant:

For each event, try to recall the thought leaders at the time, any works they may have compiled that you were exposed to, the titles of these works, the historical period (year), and describe your recollection of the event or idea and how they link back to IC):

a. Your exposure to:

- i. Jesuit teachings
- ii. Rolfing & somatics
- iii. EST
- iv. The founding of Hermenet
- v. Heidegger's lectures on Phenomenology
- vi. Speech Acts
- vii. Other relevant exposures

b. Your interactions/relationships with, and knowledge acquired from:

- i. Werner Erhard
- ii. Fernando Flores
- iii. Erhard and Flores' interactions/relationship
- iv. John Hanley & the founding of Breakthrough Learning
- v. Other relevant & influential people & relationships

2. Please recount the experience of your first independent coaching classes, or exposure to the following classes:

- i. Coaching to Excellence
- ii. Associate Coaching Course
- iii. Professional Coaching Courses

3. Introduction of spirituality

- i. How does spirituality relate to IC? What new concepts did spirituality add to IC that was not there previously?

4. In your own words, please clarify the following concepts as introduced or explained by any of the following authors/thought-leaders you are familiar with and how they relate to IC:

For each author, try to recall the any works they may have compiled that you were exposed to, the titles of these works, the historical period (year) you were exposed to their work, any events at the time, and describe your recollections of their influence on IC:

- a. Martin Heidegger**
 - i. Culture
 - ii. 5 Elements model
 - iii. The “Dasein”
 - iv. The kind of being we are
 - v. When we speak we bring forth the world
 - vi. Other relevant concepts (e.g. Existentialism)
- b. Humberto Maturana & Francisco Varela**
 - i. Autopoiesis, biological phenomena & self-reference
 - ii. Doing away with separation between outside and inside
 - iii. Other relevant concepts
- c. Ida Pauline Rolf**
 - i. Structural manipulation & energy healing
- d. Robert Solomon**
 - i. Mood, Passions, Life’s Meaning
- e. Medard Boss**
 - i. Influence on the “Integral Approach”
 - ii. Existential Foundations of Medicine and Biology
 - iii. Psychoanalysis vs. Dasein analysis (Treat the whole human, not just the body)
- f. Ken Wilbur**
 - i. AQAL model
 - ii. Transcending layers
 - iii. Influencing 10 ways?
- g. Jürgen Habermas**
 - i. Lifeworld & I/we/it
- h. Ali Almaas**
 - i. Inspirations for lower levels of 10 ways (Narcissism, down)
- i. Kapleau & Rinpoche & Fisher**
 - i. Spirituality & Zen Buddhism
- j. Any other authors/thought-leaders and their relevant contributions**

5. If not already discussed, please provide your perception of the historical roots or development of the following core concepts as they relate to IC:

For each concept, try to recall the historical influence, the thought-leaders, any works they may have compiled that you were exposed to, the titles of these works, the historical period (year), and describe your recollection of the event or idea and how they link back to IC):

- a. Structure of Interpretation**
 - i. What is the link from Maturana’s work?
- b. The flow of coaching conversations**
 - i. Relationship

1. Assessment models
 - a. 4 Human Domains
 - b. 6 Stream of competence
 - c. 10 ways of being
- c. The coaching relationship**
 - i. Mutual trust, respect, freedom of expression
- d. Biology and coaching (structural integration & Rolfing)**
 - i. Differences to EST & Flores' philosophies
 - ii. How does the structure of movement effect change?
- e. Differentiators of IC (How IC is different to other coaching methods)**
 - i. Assumptions of human beings
 - ii. Link between organisation learning and people development
 - iii. Working with and through the body
 1. Centrality of the body
 2. Coaching the body
 - a. The observer, the breath, the body & character
 - iv. Use of mood to understand individuals
 - v. Self-correction concept
- f. Other core concepts**

Thank you for your participation in this interview.

7.2. Appendix 2 – Transcript – Group Discussion: History of IC, Ireland, 31 May 2011

James: So maybe we can start to just talk about where I first started hearing about coaching, kind of the way that we talked about it. Now there is a sporting event and this was in the late 1970s when would I say, 78, 79, when I met Fernando Flores. So how I met Fernando was I first heard about him because he was teaching a class and Stacey was on his staff and you tell me about this very strange Chilean guy who was allowed, she could barely understand him, and she sat on the front row and he would spit when he talked, it was bad to be in the front row with Fernando. And she couldn't understand why she was there.

So Fernando and Werner were close because my understanding is that Fernando's dissertation was funded at least in part by one of Werner's Institutes. And then they started a partnership called Hermetnet, and Hermetnet was a company that put on a weekend class in conversations for action through Werner's network of worldwide centres. I was quite involved in Werner's organisation in those days, a seminar leader, and as a seminar leader we were all asked to go to Fernando's class. At the end of the class he asked for feedback and I said whatever I said about the class and given that I was a Rolfer at the time and I said this and that about your class and you really should get Rolfed.

And he called me up which was scary as hell because Fernando is this a giant intellect, a huge presence and a strong personality, called me up and he wanted me to come up and tell him what this Rolphing stuff was. So besides those aspects of his personality he was very open, so I went over and talked to him about what Rolphing was, and started Rolphing him. And five

or six sessions into Rolphing Fernando just started talking to me, one of the amazing things about Flores was he always would observe for a long time before he said anything. Which was a good thing and a bad thing. So the good thing was that he would know his topic and he would know the person before he spoke, the bad thing was he had incredible amount of evidence for everything he said. So it was very hard to disagree with him because he would remember everything.

Anyway Fernando asked to me, I don't think I should do my Fernando imitation now, no... What is it you do all the day besides Rolphing? I said I read books, and he said in his very humble Fernando way, this is all some, telling me about his personality. I am the best person in the world that you will ever meet for books to read and I said like what, and this is where the shift in my life happened and the shift that led to this path which was that Fernando started giving me books to read like being on time and the hard version of Maturana; the easy version of Maturana is The Tree of Knowledge; the hard version of Maturana is called, what is it called...?

Craig: *Autopoiesis and Cognition*.

James: Autopoiesis and Cognition, which is very hard-core closely argued book about language and consciousness and how they arise together. So the arrangement that I had with Fernando was given that he didn't have any money he was just starting out, I would work free free him a day per week and he would tutor me man to me in what he knew, which was of course a lot. So I got a multiple year philosophical education, I would say shot into me. Because the examples that he would give wouldn't be from you know the life of Socrates, they would be from the life of James. And so this is where I got a deeply grounded in all the [Rheis] interpretation. Because Fernando knew that, knew that like no one else I had ever met before, and lived it every moment and insisted on it. Of course you could fool around and have this casual conversation but whenever one wanted to have a serious conversation with Fernando one had to have evidence and be able to grounded and be able to distinguish between what was an **assertion** what was an **assessment** what was **request** I was making what was an **observation** I was making.

So Fernando was the first person who talked about a coach as a third person in a situation, the metaphor he always used was that they are, in an athletic event there is a player on the field who is doing the action and scoring the points for the goals, and then there is the commentator up in the booth. And that person's description has no effect on the play, and then there is the third person which is the coach, and the coach has a way of talking, a way of pointing things out about the situation and about the player's that has the player be more skilful. Was his metaphor for coaching.

After a year or so of working with him something like that, this is how Fernando talks, he says I invite you to apply to be a communication for action workshop, doesn't invite me to be a workshop leader, he invites me to apply. So I apply and I end up leading his communication for action workshop for about two years. So this is a workshop that is Saturday and Sunday, and it has really a simple structure, it is speech act theory, but it is only conversations for actions so it is **requests, promises, promises, assertions, and [decorations]**. Those are the only parts of speech act theory that he was teaching in those days. And then **listening**. But not listening like anyone else I have ever talked about listening, not listening as in you can repeat back what was said to someone, but listening as in the world that is being brought forth in

your awareness or being brought forth in your mind as someone speaks, the active interpretive event that is listening, so listening as active, listening not being just this notion of being a receptacle for what is being said.

So Fernando had very strange neologisms, what is the word for a new word, neologisms, anyway, new words. So he would use listening, like he would say things like what is your listening...

Stacy: You know what is your listening about, meaning what are you making of that.

James: Or what do you listen in this.

Stacy: Right instead of what you hear, what do you listen.

James: What do you listen, and even though Fernando had an odd relationship with his body he also knew that he was, all the time, he knew from the beginning that he was listening with his body. And in a way it is important to know given the trajectory of our classes is first that this was all done with an extreme amount of fierceness or forcefulness, better said forcefulness, where assessments would be made of people with little regard about its effect on the person but much more interest in its being able to be grounded in observations.

So the next thing happened after a couple of years of leading these classes for Fernando is Fernando and Werner's partnership fell apart because of these scandals that were about to come out about Werner and so Fernando and he broke up their partnership and that was out of my [own] which was a very trying time. But I ended up after a few bounces being in a partnership with John Hanley. John Hanley was the founder of this different organisation called Life Spring which was pretty much a knockoff of Est. Like you go to Hong Kong and you get the knockoffs of Rolexes, you go to [San Ropel] and you get a knockoff of est called Life Spring that John did. And John wanted what Fernando knew about language because he could tell that this was the hottest greatest edgiest thing and that Werner was interested in it, so I've Werner was interested in it, John knew he had to be interested in it. He didn't like John, I think it was sort of creeped out by him for good reason.

So John approached Fernando...

Stacy: That was *Breakthrough Learning* that you had was that right?

James: Yes called *Breakthrough Learning*, so Hanley approached Fernando and Fernando did what Fernando always does which was yes you can do this but you have to pay me an extraordinary amount of money... \$1 million, and they have to own half your company, and then they said no, no, no, I am not going to do that. And then when he found out I knew it, we started this company called *Breakthrough Learning*, and we started doing courses around the country through the Life Spring network of offices, so we can format around projects. So it is taking speech act theory and aiming at projects, it was called *Breakthrough Learning*, the workshop is called the *Business Acceleration Training*.

And the only importance of all that is that it is from the people who went to the business acceleration training for and the first people in the coaching classes that we ever did. So what happened was we hired my father at some point to help us get into organisations,

corporations, and he said you have these hundred people, this is what my father would talk, as a total businessman, you have these hundred people captured every weekend, in his workshops. You should be selling them something else. So what could you sell them? And I came up, really this is how it all happened...

Stacy: This is how coaching started.

James: Really it was this conversation with my father, he said what else could you sell them, and I said, I don't even know what I said, I came up with three things, and I said, I could sell them a coaching class. He said well go ahead and do that. So I started talking about this coaching class that was going to come up, that was coming up, and that what was going to happen in this coaching class is you learn to coordinate action and you learn to defeat this negativity in your mind or in your thinking, and you would be able to get things done that you never could before. And I had no idea what this course was, all I had was a way of talking about it, but after a few times of saying it got interesting enough that was it 10 people in the West and 10 people in the East...

0:14:34.9

Stacy: More like seven, six or seven.

Sarita: I can name some of them.

Stacy: I can name all of them but anyway yes, so a small group in the West Coast...

James: This is why it is not good to do this with one wife. Anyway a small act of, anyway a group in the East in New York, and the group in the West with Sarita is one of the first people I met, and also interesting enough with a history of how coaching unfolded Laura Divine who now has her own coaching company in Canada.

Anyway what these first coaching classes happened from when I was flying to New York I would pull out a pad of paper and I would have two days with the people and I would figure out what I was going to do in two days with these people, and what was in that class was speech acts as in **requesting and promising, making assessments, how one assesses oneself**, and then some philosophical roots, it was a six-month class, we met for I think 2 1/2 days at the beginning, and then two days and then two days. We had no supporting materials...

Sarita: Yes we did, well we had I think it was the pre-work right your autobiography in stages.

Stacy: Your autobiography, then there are pages because I have my notebook.

Sarita: And then you videotaped everyone what are you going to do for the rest of your life. Come back tomorrow morning and tell us what your life is about. And you had to read 12 books including *Being and Time*.

James: So what we did in the first weekend just to let you know the level of confront was, people would come in and we would have a video camera, and we would have people stand

up one by one in front of the camera and then we would talk about their body in terms of Rolting distinctions, in terms of the distinctions in Ron Hertz book called *The Body Reveals*. And we talked about what you could tell about the person's body comparing front to back right to left top to bottom.

Stacy: Yes what the body revealed in terms of what that told you about their whole life and their whole take on it...

Sarita: And you would also bring in data from what they had written of their autobiography with piercing questions.

James: Yes it was pretty nasty. Like we would say, we being I, because I was the person at the time, I would say things like...

Stacy: I still remember the question.

James: Really what?

Stacy: You ask me about my mother with the video camera on with everyone around of course. And they started to; it was [probation] alright.

James: Yes so this was all done with content in the spirit of Fernando and est which was that the trainer was right, that the person coming to the train doesn't know anything, they have to get straightened out.

Sarita: It also was not the community the container of the class as a group to fold what was happening.

James: No there wasn't, there was none of that, it was all individual people interacting. So that was called, I don't even know if we called it coaching one, we just called it coaching. Because we only called it coaching one after there was a coaching two.

Pamela: 0:18:47.0 How did the students respond to that? What was it like to be a student in that class?

Sarita: It was a very intriguing, and painful, and yet it was like I am seeing something about myself that nobody else has pointed out to me. So that is what kept bringing me back.

Pamela: 0:19:19.2 That is what I wanted to know - there is something about this, this has endured, there had to have been something in it besides it being serious conversation, there are also had to be some holding of some kind.

Sarita: Some people left but some stayed and I also think that at least in the class that I was in there were several of us from PacBel - that we began to create some kind of a community to support each other in what was going on. And several of us came from Life Spring, I know I did, Wendy did.

James: Yes that is where the first audience came from, the investments I did in these classes and then I guess maybe some other people had heard about it elsewhere.

Sarita: And so Life Spring had created an opening but the work was not sustainable. And then this was a way from me that I felt maybe we could sustain.

James: Another answer to your question, Pamela, was that the content in those days was nothing anybody had heard about before, which is how things get done through conversations, which might be commonplace in our world now, but it wasn't then. And that the way to bring something forward is to make a request and that there is a difference between an assertion that has grounded evidence and your assessment. And there is this other background event that affects our listening, it affects what we feel is possible which is mood. A very big deal. And that the other part that was different about this, you see you have to remember this is kind of in a way the heyday, the potential movement was that this had academic roots. So if you went to the est training or if you went to LifeSpring training, it was experiential, and the exhortation all the time was get out of your head get out of your head get into your experience get into your body. And Fernando would say yes but what is the grounding for that?

Sarita: He brought in Solomon's work with emotions and he brought in Maturana the cognition of biology, and Heidegger.

Stacy: Right, the whole structure of interpretation was introduced. Werner's work was all about your own experience, like this is your experience - but it was very much like a rising phenomenon without understanding any of it. Sarita, structure of interpretation actually lives and exists in est and the theory was you know your experience is all there is. What life is, is that, you thought there were other people out there; they flipped that and said "no, it's all you, it is all that you experience."

So this was like "your experience isn't just some magical thing, it is like you actually have a structure of interpretation - influenced by all these things, and furthermore it isn't real, it is real but it is not - it is how you are seeing the world because everybody else has got one just like that, and so that was you know...

Sarita: I think for me coming in as an anthropologist that my understanding of culture and having worked in the business world and at the same time I was exposed to leadership development in my company which was the work with [Wastinski] and [Fuji]. And I was simultaneously working with organisational learning at the time. So those three threads and the academic background of those two attracted me to the foundations that I found here.

James: And I was of course making this up as I went along, and didn't quite know how it would turn out or what capacities people would have at the end, and was going by what I had heard from Fernando was what people ought to be like what they ought to be able to do. One of the things that I don't know, maybe you to know, I don't think Fernando ever said a structure of interpretation. I think that is from us. I think that is a term that comes from us.

Sarita: Isn't that like Heidegger or something?

James: No.

Stacy: I have heard it when I came but I don't know.

James: I invented it as a way of talking about it.

Stacy: I don't know, I mean I don't know.

Male: 0:24:29.2 Could it be [much rounded] though?

James: It could be yes.

Male: Those things talk to that structural coupling so...

James: Yes so I am sure I'd just shifted... Structural coupling to structure of interpretation.

Female voice: 0:24:45.4 And were you talking about, were you using that language at this time from the coaching class?

James: Yes because in the first coaching class I think you guys have to help me remember, I think we had the basic model the structural interpretation leads to behaviour.

Sarita: Yes the ice cube model always, you know using, thinking about structural interpretation is the shape of the ice that would come out and based on the ice cube tray.

James: Right the ice cube tray, so you all know...

Male: 0:25:20.4 I have heard this.

James: Ice cube tray.

Stacy: Yes we have square ice cubes or rectangular or round, that show up based on the structure. Water is the same.

James: Yes so life is like the water and the structure of interpretation is like the ice tray that shapes the water into how we are.

Stacy: I don't even remember that one.

James: I think I remember it now that you say it.

Sarita: Obviously I remember it because it helped me understand it, like what is SOI. Because initially without knowing the foundations it was hard to capture.

Stacy: So even though we called this coaching, and even though it was a learning about ourselves and how we think, I don't remember in that first coaching one or coaching two classes did we actually, was there any instruction in actually coaching?

James: How to coach.

Sarita: Well we worked with each other let's put it that way. There was a lot of working with each other, and James would be pretending he was reading but he was listening to all of us.

James: I could have been doing both at the same time.

Sarita: You could have been doing, but you told us...

Female voice: 0:26:31.9 When you say work with each other meaning the students?

James: Yes but there was no...

Stacy: It wasn't kosher each other it was engaged in an exercise together.

James: Yes because there wasn't things like, this point there were no things like the flow of a coaching conversation didn't exist.

Stacy: You know I am wondering if it had its first forum towards the last session, because then remembering there was the enrolment piece, there were parts of it. They remember a coaching Wendy.

Sarita: I can fill this in there because I have my book from them. I wasn't in the first class, I was in the second class, and we have your...

Stacy: Coaching two.

Sarita: No not coaching two, coaching one.

James: But there certainly wasn't the flow for a coaching program, none of that existed.

Female voice: 0:27:27.3 It didn't even exist in 1997.

James: When you did the PCC?

Female voice: I would have to doublecheck my notes but I am pretty sure that was like...

Sarita: Because this was 1987, his first coaching class.

James: Right, 10 years later. So just to keep the storyline going, I started the coaching one, the coaching classes in New York and in San Francisco, still working for breakthrough learning. But then John wanted to stop the partnership and he wanted to have me go work for Life Spring which I had never... a gazillion years ago. And his option was he could either refund all the tuition to people who had paid it for this class or he could miss the deal that we somehow, I don't know how we came up with this...

Stacy: Well yes because he made his decision that he was done playing with this and James would come work for him and he was like okay he didn't want to do the partnership anymore, he just wanted to quit it, and it was right in the middle of these coaching classes that we had started. Yes I think, and yes... So it was midyear of these coaching classes, and some people had paid in advance and other people were paying on time, or were paying overtime, and so the deal we made with him was okay let us, and this was the bit, let us collect whatever money is still, of course whatever money we already have we will divide by whenever the partnership was you know the money that is here. But if we can just be responsible for you

know like collect whatever revenues are still coming in on this which whenever the number was, not very much, and we will cover all the expenses to let James go to the East coast and finish these classes, there is also a Washington DC class, we have three of them going on in the community.

And if we can take the little Mac plus computer, the one asset of the company that we want, you can have everything else but let us have the one computer, so we have the computer. And let us have the intellectual property that James created called these coaching classes, because you don't want to do these coaching classes. He said okay, and because he really could have said you invented that while you were in partnership with me, I owned that. But he said not, yes you can have that no problem, I just want out.

James: So that was the conversation that got us separate and independent and that really started us in the business.

0:30:17.2

Stacy: So then we finished the classes at our little computer and we owned the ideas called coaching.

Female voice: In what year was that?

Stacy: Well we started the classes in 87 so this was six months, so it is May 87. So at the end, like November 87 it was right near the end of the year because it was before the class was finished, so the end of 87.

Female voice: Was anybody else doing something called coaching then?

Stacy: Yes the only other person was, well no, maybe not then... It was 87...

James: I don't know anyone, who are you thinking about?

Stacy: Thomas Leonard. We had heard about him first when we were in 88, 89, we heard about him in 1988 89-ish, and he had been going for a little while, and he had started the...

James: But I am sure that he is later because Thomas Leonard who started coaching University was coming from Est. So what happened was from Fernando's influence on Werner, they started talking about coaching in the Werner network.

Male: 0:31:24.3 If you talk about est, what is est?

Stacy: It was in the 70s there was a lot of personal development, self-development workshops going on. And Est was the biggest one I think worldwide. And it was a very short as in two weekend session, and it was very, it was all about your own personal development, it was all about your own personal development and having breakthroughs in your own personal development, but it was a very cold like experience and there was a very magnetic figure and I can't talk about what actually happened in there.

James: It was a two weekend a process that reported to enlighten people in those two weekends. And Werner incorporated many different modalities that he had learned from Scientology, from Zen, from Gestalt Therapy and so on into this weekend, these two weekends, it was very confrontive and full of emotional pressure, but brought people to a cathartic release that led to lots of loyalty and working with the organisation as it did other courses going on.

Anyway it was big, it started in the state and it went to Europe, it went to Asia, it is still around in the form of Landmark. So Landmark Education, so when Werner had all these scandals he sold the company, here is the cover story, I don't know whether it is true, he supposedly sold the company to the employees, stepped back, and they now are conducting this landmark education. It is the same, the intellectual part of it is still Fernando, all that stuff about declaring your future and making offers and all that stuff is Fernando still.

Sarita: Has anybody here done Landmark? I did Landmark. It is a forum about [unclear]...

Female voice: I did LifeSpring.

Female voice: James can I ask you it was personal development, oh no, the two weekend sessions, did you say personal alignment?

James: Yes they would call it that.

Stacy: It was the 70s.

James: [It] locked me in a hotel room.

Craig: James apart from people like Solomon, Maturana you mentioned [Gojip], who were the other philosophers and, who else was the wellspring of what we have become today?

Stacy: Some focus on the body.

James: Yes so I have a list that I can go through here with you. But let me just show you one piece. So what happened when I left Fernando was the company also relationship broke, because this is how Fernando is, Santo I... Anyway, so then I started studying on my own. So I had learned about Heidegger from Fernando and had read a lot of *Being and Time*, but that wasn't the book that had me understand Heidegger. The book that had me understand Heidegger is called *Basic Problems of Phenomenology*, which probably wouldn't jump into your hand at the bookstore. But what is fantastic about it Craig is that it is Heidegger's elections explaining *Being and Time*. So and [pats] *Being and Time* and accessible and understandable.

Craig: So it is written by him?

James: Yes it is his lectures yes, it is really good.

Female voice: So why did you call this class in 1986 or 87 coaching? Why did you use that word?

James: I don't understand your question, so I had learned of the work coaching as I said earlier from being around Fernando.

Female voice: Fernando used that word?

James: Yes.

Female voice: So Fernando used the word coaching for what he was doing with language?

James: Yes and having people become more skilful. And it had a very narrow band, it was being linguistically competent, being able to have conversations to forward action and being able to understand one's own listening. But that is all of us there wasn't anything beyond that. And it didn't even, one of the things that was missing in Fernando's world was conversations that developed relationships or conversations that developed possibilities, just always started conversations but actually...

Female voice: So where did those come from the relationships and possibilities?

James: I think it came from knowing Ken Andenter. So Ken Andenter is still a friend of mine and Stacy's, so Ken is a really wonderful incredibly smart person that was an Est trainer that was working with Fernando when I was getting trained to lead Fernando's workshops. And Ken is relationship based; he knows everything happens from relationship. So he brought in this idea of relationships and possibilities.

Stacy: I did not realise that, I thought that was all Fernando or Fernando and [Chancy].

Sarita: Yes that is what I thought too.

Stacy: I just assumed.

Stacy: It talks about all three of those.

James: Yes but I think, so Matthew [Bud] for those of you who don't know wrote this book called *You are What You Say*, he was a Harvard professor and an [empty] that worked with Fernando for a number of years. But he also worked with the Werner, and did Ken's communication classes. So Ken Andenter took Fernando's stuff but can put it in a much more human situation than Fernando did.

Sarita: So this is while Ken was still working for a Werner right, and then under the auspices he started, Ken started offering communication workshops and developed a whole curriculum around communication. And this was I think after Fernando and Werner had broken, yes so when a Werner and Fernando work together Fernando was offering this communication for action workshop which is very very first thing which James took which is all around that action, and then Fernando can I say this when it is being taped, always was critical of Werner, say that way. He may have originally been, at some point in the relationship was merely useful for him, so he was starting to really disrespect Werner but there they were in his partnership, and then at some point they broke the relationship and Fernando went on to do his own thing. So then Ken who was also studying with Fernando developed this communication curriculum that Est offered, and that may be worthless I don't know exactly...

James: Yes well, so the way I learned the action workshop was through Ken. So I didn't learn the action workshop from Fernando, I was in Fernando's workshop but the way it works was is that Werner always had a trainer working for Fernando, this is how both these guys are, so Werner has a trainer there to be a spy, and Fernando has a trainer there is so we can turn the trainer to Werner's side and be a spy on Werner. But you can't turn Ken Andenter, Ken Andenter...

Stacy: Doesn't bend.

James: No, the sun could not melt Ken Andenter, he is just...

Craig: Sorry this is Ken...?

James: No Ken Andenter, somebody that you don't even know and don't even need to know, it is a guy in the story of how, the conversation would possibly and the relationship that is because I learned the action workshop from Ken. And Ken is relational.

Female voice: So James, Sarita mentioned you gave the trial books for example for them to read, on what basis did you select the boat and how did you use them?

James: They were the books that any normal good person would read. They have a philosophical understanding of things. So I was, what happened from me when I went from the Werner world to the Fernando world was I went from the world of your experience in being in the moment and what are you feeling right now to what is the ground of what you are saying? So in order for people to have grounding in what the content of the class was I gave them these books.

Sarita: And the content of the class from my perspective was based on the question of what is EMV. Because that is how I heard it. So a lot of the books were different ways to study...

James: We are going to get your question.

Craig: I want to keep that question alive by saying what other theory, I think the part that is missing from me is how do you think your Jesuit training and your Rolphing training has informed and influenced the work that we do?

James: Right, so the body, so what Rolphing brings to it, and you can see Rolphing like an example I was given before, that what we were doing coaching, we would have people stand up and I would read what was going on with their body. So Rolphing's premise is that by understanding the physical structure of a person you can understand the world that this person is constructing. I like the kind of stuff that Steve does in the Somatic that it really is the case that if somebody is bent over like this they can't see a lot of possibilities. And people who are like this really are puffed up and full of themselves. So this was Ida Rolf's central premise or she wouldn't even say true, she would say truth, which was she would say it in a very dogmatic way, she would say something like a structure determines behaviour.

Sarita: That is also used in the language of systems. That line, structure determines behaviour.

Craig: It also strikes me as this is Maturana as well. Structure determines behaviour. So it is interesting that these things are in conversation.

James: Yes and she had it purely on an individual person's body level. So I have, I have been a Rolfer from 75. I started being, so I have my hands on people's bodies, whatever it was, 20 times per week, and was able to see how release in the person's body would release something in their own emotions or in their own feeling about themselves. And also I have gone through a lot of Rolphing myself and has seen the shift in my attitude and energy and beliefs.

Sarita: You will stand up and you are straight.

James: Yes so I knew from my own experience both having been Rolfed and also working with people that the body was a very powerful way in. And that was different then anything Est would ever say and it was different than what Fernando would say. You know Fernando went to Rolphing because he was a curious guy and he also had this pain in his body that needed, wanted to release. But he would talk about Rolphing as a way of shifting a person's life. Like I would.

So the Jesuits, what Craig knows about my background is I went to an all boys Catholic high school which was led by Jesuits, and for me that is along with going to the Zen world and what I learned from Fernando really one of the big pillars of my education. So what was it about that? It was an openness to questioning, questioning, questioning, and also staying open. And seeing things from many different disciplines. Maybe the other part Craig is, and this is also different from Fernando and from Werner was my understanding of that, is it had an interest in the humanities.

So from pretty early on I worked, with [Benin and Arpricula] is asking people to read books or go to movies or be engaged in culture, arts, and that sort of...

Sarita: Music.

James: Yes and music.

Sarita: Poetry.

James: Music, poetry...

Craig: And I think it is a wonderful part of the tradition that we shouldn't lose. It shouldn't be lost out because we spend so much time in the work that we do through poetry through music etc, and that is where it is coming from. So I think it is...

James: That is right, so in that part of my education I did read great literature and I did read Tolstoy and Dostoevsky and Joyce and Virginia Woolf...

Craig: So the classics. And how are the classics imprinting into the world.

James: That is right yes. And I think the, I don't know what you guys think what I think is what makes our school distinct is that we are open to be influenced by all those things. I think in my prejudiced view which is also, my prejudice of you, that other schools have a too-narrow aperture to the world. Like for example I understand I named coaching school in Canada, the aperture is Ken Wilbur, and things come through Ken Wilbur if they are cool, and if they don't they are not.

0:47:28.8

And I think that in other places if it comes through Thomas Leonard it is cool, or if it comes through Fernando it is cool, but for us I don't think it, at least from talking to you guys I don't think any of you think anything has to come from me to be useful. And we are all always reading whatever we are reading and having experiences and bringing it in. And I think that is also part of the Jesuits background is that.

Sarita: If you were to define which part of the Jesuits background, is it like, do they have a sort of a text they work off or is it just a philosophy that is around for a long time, is there a place? A source that says the Jesuits philosophy.

James: Yes so Jesuits. So Jesuits were started, I mean there is a lot to say about that.

Sarita: Yes I just wondered if there was a reference or a text that people can go to to say okay so I can understand the Jesuit philosophy and what that is to comment and see?

James: No I never got it that way so we would have to look. I got it from being dumped in the middle of it. But then, so after being in the Jesuit high school I was studying to be a Jesuit priest for a year and I even got it more intense. But I think the metaphor that the Jesuits have is one that we use without saying it, which is the Jesuits are monastic see in the world. So that is what distinguishes them from save the Franciscans or the Benedictans, and that might do a little bit of work out in the world but mostly their life was in the monastery. And the Jesuits, they would come back and live in common but there are jobs would be teaching or running a hospital or something like that out in the world. So this idea that taking one's spiritual development into the world and then having what happens in the world be a spear to our spiritual development is also from them.

Stacy: Just reinforced again [Norman] and reinforced the [unclear].

James: Yes.

Female voice: So do you want to talk about Zen too?

Stacy: Say that again?

Female voice: Do you want to talk about Zen?

James: No.

Craig: You see it is such an important point because of the danger sometimes from people I have heard on the outside looking in is this is very Zen sounding, and it is very frustrating to

say okay let's hold on a minute, let's just sit down and actually go back, way back, and talk about Zen as part of the process, a thread, but it ain't the fabric of what we are doing. And I think this is the important part of today's, I think many of us understand the Zen part, we are going on our own experiences etc, but I think the richness of a day like today is let's pull out of those other threads that kind of almost are part of your fabric, but kind of tend to get forgotten. And I think they are beautiful part of what we do.

James: Right, exactly,...

Female voice: They were joining with Zen and Est?

Stacy: No.

Female voice: Jesuits and the Rolphing.

James: But here is the point, so this isn't let's start with Zen and what would Zen do if it was doing coaching. Or what it starts with, something else which is really...

James: Pragmatic, this is what... I really do think that what we are doing here is asking the question all the time is what is it that anybody has learned from any tradition, East West North-South, and that is useful for the [enfoldment] of people, the development of people, and is it accessible in a way that we can bring it, and if it is let's do that.

Female voice: And you are saying that is actually a Jesuit principle, in the sense of explore, stay open to knowledge?

James: I think they definitely have limits because of course they are Christian and we don't have that.

Sarita: What I have heard you say is that the way you were thrown in the middle of it you experienced this openness that impacted you and you, that you brought to the work. So it wasn't necessarily they talked it but that is in their way of being.

James: Right, so there wasn't anything that you could bring up to them that they would say why are you reading that. You shouldn't read that, that is stupid. They would say wow I haven't heard that person let me read that, or wow I know this person is an atheist but they have great ideas about this or that.

Stacy: I think the things you said before was that in terms of Christian traditions that the Jesuits clearly are about sharing their spirituality, bringing their spirituality out into the world and letting the world influence their spirituality, and the other things that you are currently involved with that have a similar thing was Rishwan and also not just Zen altogether but Norman's thing is every day Zen, so that is his specific take on Zen is let me be out in the world with it and let me you know...

James: Yes the slogan of Norman is *Every Day Zen* is influencing and being influenced by the world. But we haven't got to Zen yet. Zen didn't start yet.

Sarita: We are back to coaching one, from my memory when I asked where is the spiritual path, at that point you were not open at all to anything spiritual, and there was more of a, the feeling I got was almost agnostic.

James: Yes or hostile even, because Fernando was hostile to all that. So the spiritual wasn't there. So how would the spiritual come in, Stacy will answer this question.

Stacy: I will not answer this question I don't know.

James: So how did this happen?

Sarita: When did you start sitting?

James: I started sitting for a long time, so when did I start sitting? I would say... Like I was sitting when Deb was born. 85. So let's start saying I was sitting since...

Stacy: You were sitting when Deb was born? Wow.

James: Not at the exact moment. But anyway the late 80s, we could say the late 80s.

Stacy: Okay then what brought you to sitting that wasn't spiritual? Because we are right around the time that we were doing this.

James: Yes so the spiritual stream for me was, so this is how it went, I just started high school, in high school I was very spiritual, involved in the engaged Christianity in the Jesuits, and then I went into the seminary, and then for years afterwards was still interested in spirituality. But then when I met Werner; Werner was not spiritual. It was... And then it even got less spiritual around Fernando. Which I think Fernando is an atheist, I don't even think he is agnostic, I think he is... He is a Marxist materialist.

Stacy: Sounds dandy.

Craig: There is a paradox for you.

James: Yes so what happened? This is I don't know.

Stacy: Because when I met you which was around 87 you were absolutely like...

James: Yes, yes. So this is a mystery to me.

Sarita: It will occur to you as you go along; I bet you will remember what happened. When did you meet Norman?

James: Yes so Norman wasn't the first one. Okay so now I know, thank you. So I read the Three Pillars of Zen, which is Kapleau, Steve?

Steve: Kapleau yes.

James: Kapleau, so Kapleau is an American that got interned by the Japanese during World War II and lucky for him he was interned with some Zen masters. And he learned Zen and he learned Japanese and he brought it to the West. And I read that book, that is about Kensho, Kensho is a Japanese term about enlightenment as in immediate enlightenment. It's Rinzai school of Zen which is study [unclear], put a lot of pressure on the person, make them or potentially with the teacher and they will have a breakthrough at the Kensho.

So I remember reading this book and coming to say to Stacy okay I'm going to get enlightened, this is my project. So then I started reading spiritual books, and one of the ones that I read was the Tibetan Book of Living and Dying by what's his name, Sogyal. Yes and I went to somewhere in the late 80s early 90s I went to...

Sarita: I have just [pulling]... And I went to a retreat of his and it was exciting and great except he was a peripatetic teacher, and in the Tibetan lineage you have to have lots of contact with the teacher to get the transmission. And then it occurred to me that Stacy and I live like a mile from the San Francisco Zen Centre, I thought hm, so then I went to San Francisco Zen Centre and did... When we think of every single thing that I have ever done in my life. But anyway I did classes there, they got me interested and then I went and did my first retreat. So this is an important part of the story, the spiritual retreat.

Female voice: Sorry before that where did you start the classes in the Zen Centre?

James: I would say, what shall we say, like 1990 something like that? So when I say I was sitting with before then was I had read about sitting there doing a kind of sitting but not seriously. So I went to the San Francisco Zen Centre, first retreat and some of you have heard me tell the story that how it works in [Sotho] Zen Retreat is during, this was a seven-day retreat, and sooner or later somewhere in the week you are strongly encouraged to be with the teacher. And so it's got to be Thursday or Friday or Tuesday or Sunday, so maybe it was even Saturday, and I was waiting outside the teacher's dorm. The way it works is they ring a bell and then you ring a bell and you go in and then when they are done with you they ring a bell, so anyway I am waiting, waiting, waiting. And while I am waiting I am remembering the stories I have read in Zen literature of meeting a teacher, where they shout at you they hit you with sticks, they ask you these impossible questions like are you enlightened? If you say yes you get 30 blows, if you say no you get 30 blows, so what are you going to say? So I am kind of anticipating this.

But I go into this room and the room is, I'm going to wait until she she is done. It is a really small room and [Rav Anderson] who is one of the, was he [Avid] at that time? Anyway no, he was not. Long-term teacher at the Zen Centre, and I walked into this room, and the room was very golden, and the room was golden because it was painted that way and it was full of light of candles but it was full of the light of his presence. And I walked into this room and it was so warm, and I felt all my fears immediately went away. And I sat down and told Rav my story which was I am trying to meditate and I am counting my breaths and I am trying to get the 10 and so far I have gotten, sometimes I have got up to two. Mostly I am on one. And you say you know, pay attention to your body and I can't find my body and feel your body and be still and I can't be still my body is always moving and some other stuff.

And I talked to him for half an hour or 20 min and at some point he reached out and he grabs my arms and he says keep going you are doing so good. And that moment changed my life.

Because I saw at that moment that love was way more powerful than fear is. And that was the turning point from trying to be like the Werner world or trying to be like the Fernando world and trying to be easier. I know it has taken a long time that was the start.

And then I started from there are going to [Soshim's] more frequently, and then along one of those I met Norman. And Norman is important for us because he is one of these other people that is open to all different traditions and intent on having an effect in the world. And being in the world, not being removed from the world.

But I also want to get this back to your question about the academic things, so besides Heidegger and Maturana and Solomon which is about Solomon's work about moods, so the thing that is important about Heidegger is his idea that we are not any particular way until we take up with our culture and our culture shifts us, makes us into the person that we are. And that this radical notion of Heidegger's that there is, anyway, I don't want to do a whole philosophy class here, but the doing away off the separation between inside and outside, and the point of Maturana's is he grounds all that in the body, so it isn't just an idea.

But the other part of Heidegger that is important is this book that I don't even know, I'm sure we made you guys read it, called *On the Way to Language*. *On the Way to Language* is a very poetic beautiful book about that when we speak we bring forth the world. But also important in here is William James, the American pragmatist, the will to believe, I love William James because he is one of the philosophers that can write. We have been reading William James and I discovered that at least 70% of the trouble with reading philosophy texts is that the philosophers are bad writers. It isn't that their ideas are so dense.

But the book that caught me on to the importance of practices is a book called *After Virtue* which is written by Alisdair MacIntyre. And he references Aristotle.

Stacy: I think there were a few chapters in that book that were all about [unclear].

James: I don't even know what the book is about you know, in a way I don't care what the book is about, because what I got from him is that the practices we engage in turn it into the kind of person that we are. And I have not heard this in Fernando, I have not heard this in Werner.

0:15:29.8

Stacy: And that was part of the first SOI the moment. Language and body.

James: Language and practices yes. The other important book about pragmatism is Rorty's book called *Consequences of Pragmatism*.

Female voice: *Consequences of pragmatism*?

James: Yes, Rorty is also a pretty good writer.

Stacy: They are all old books because this is the book list that we have for coaching one in 1980, so some of these books are possibly out of print.

James: Some other people that are important or... Schutz, Alfred Schutz who is a, according to Steve a phenomenological sociologist. And his book that really opened up my thinking is called *The Structures of the Life-World*. And the [unclear]...

Stacy: Another [force] we live by. Gareth Morgan *Images of an Organisation*. Because that is about structures of organisations.

James: Yes so we have to go a little bit slow so people can get it. So metaphors we live by...

Female voice: The same Alfred Schutz?

James: No. Metaphors we live by is George Lakoff.

Female voice: The structures of the life world what was that, what insights did that have?

James: So this is a phenomenological look at how we live every day. So the way the world is arriving for us isn't random. There are structures in it. So what are the structures of the world in which we really live? So this life world is a translation of some German term, I don't know what it is, but the life world is not the objective world of physical properties, but the world of meaning that an individual person lives in. So what is it that gives that support and allows it to cohere over time?

Craig: James did that have an influence on any of the models? Like maybe the five elements or something?

James: No I don't know. I don't know where the five elements came from. I mean it is...

Stacy: We made it up at lunchtime at coaching one.

Sarita: I have somewhere in my nose because I asked to that question at BLT, and you spontaneously answered it, so I will dig it up.

Stacy: Because of part of coaching one was also you asked us all to develop a model to assess.

James: Yes that is a great one. Some of you don't even know what the five elements model is because I don't even know if it is tied anywhere anymore.

Female voice: The CTE.

James: It is still in the CTE okay.

Steve: In your book just to remind you what you wrote.

James: It is in my book yes.

Steve: I believe you say that it is rooted in Fernando's technique.

James: Yes so immediate concerns commitment and future possibilities is Heidegger.

Stacy: Mood is Solomon.

James: Mood is Solomon, and then personal cultural history is just...

Female voice: How do you spell Solomon?

James: Like the king.

Steve: But I think this is an interesting point that we need to keep not only reminding ourselves that the people that we encounter is we are not going to point you one source for a single model, because they are integral models. They actually combine a number of different perspectives and actually are very integral. It is not where did this come from, it is let's look at the sources of where it has come from because there is a variety.

James: So what do the important books tell you about, so the Gareth Morgan a book images of organisation, I don't know if you guys can get this but this is a really terrific book.

Steve: It is available now yes.

James: Becker's book still in our reading list but did not look at. Opened my eyes, anyone dies, lots of ways from here...

Female voice: Becker?

James: Becker.

Female voice: 0:20:41.5 Sorry so going back to Morgan, what did Morgan's book open your eyes to?

Female voice: Which book is that?

Female voice: Images of organisation.

James: So images of organisation my recollection of this book is that it is a collection of different essays. And one of the people that this most strongly turned me onto is [Habermass]. Because they have, and [Habermass] is the source of the "I we it" model that we use somewhere, is it still in the...?

Female voice: CTE. You also use the uniform metaphors for organisations. And the human beings in them.

James: So some of the background some of you don't know which is that in these days coaching was all for business nowhere else. Yes, there was no... Maybe George Leonard was doing life coaching but all the connections that we were talking about in the classroom was all about business business business.

Stacy: And I don't know which of the other companies but [Pacbel] was a big one that you started.

Female voice: 0:21:54.4 Would you say this is up to what point? Up to in the 90s it is true?

James: Yes I mean certainly in the late 80s or 90s it is all about business. And I have no idea of life coaching. One of the things that maybe you can remember, at some point let me just finished this first, but I want to get to is at some point it occurred to me that I could coach people individually. I had not been doing any of that. Coaching people in the classes but not having individual client. And Stacy could probably look that up when I started.

Stacy: I think shortly after coaching one you definitely coached me, and I think Laura.

Female voice: Look where that got you.

James: It was 50-50.

Sarita: She hadn't gone to the dark side yet.

James: So Habits of the Heart, Habits of the Heart is an important book. This is Robert Bellah and Bellah is a sociologist...

Sarita: It is an especially important book if you are coaching in America.

James: Because it talks about the meta-narratives of America. In the States. And two other books that maybe Steve knows about and Steve has probably even read but maybe the rest of you haven't heard about, are called existential foundations of medicine and psychology and...

Steve: Really good, this is one of my primary sources for all the somatic work that I do.

Female voice: Say it again, existential foundations...

James: Of medicine and psychology. Boss, Medard Boss. Boss is the last name.

Sarita: Medard Boss, his work was rooted in Heidegger.

Female voice: And what was the insight in the somatic?

James: I will tell you in a second. Only other book [Carrie] is called so it can be more fun to write out, Psychoanalysis and Dasein Analysis.

Female voice: And what was the other one?

James: Dasein Analysis.

Female voice: Dasein, it's a German one.

Stacy: We haven't told you about [Drakos] yet. They are both Boss.

Steve: Both of those are out of print.

James: They are hard to find. So Boss was a physician that was analysed by Freud, was neighbours with Jung and friends with Heidegger. And he invited Heidegger to his seminar every summer in Switzerland and Heidegger would come in, try out some weird stuff with these doctors, and there is a book... the Zolokon Lectures which are about the lectures that Heidegger gave to this group. Anyway what Boss did was he rethought how it is that people... he re-understood human beings in terms of Heidegger instead of understanding human beings in terms of Freud. And he understood human beings in terms of Heidegger that they are meaning making beings that their world is brought forth in language... Yes and how time affects them, how death affects them, he worked with them in a different way.

So this was more understanding people in a different, in a non-traditional way.

Steve: In a non-psychoanalytic way.

James: Yes non-psychoanalytic way.

Stacy: Even the notion of death was brought in to various, it wasn't a notion. Whether it was from denial of death or from Heidegger but that thread right from the beginning like if you keep death in front of you and your life will be more meaningful.

Female voice: 0:26:50.5 So this sounds like a key source of, because so much of what you said now you're teaching is what you talk about ECT is exactly this. So you are saying this is the book that brought it all together for you, although you had read Heidegger and whatever he was expressing it in a very particular way.

James: Yes because Heidegger never had any idea or maybe not much interest in what he would do with this. And Boss was very interested in helping these people who are deep suffering that would come to his office.

Steve: What I remember from reading Boss, I thought this was a brilliant insight, is he was a psychiatrist, and all the psychiatry medicine in those days was western influence that he was associated with and it was all physical. And he kept finding that doctors wanted to treat physical bodies but not learning to treat human beings. And his big insight that he created this whole work was what if we started with the premise of how do we treat human beings, and then build medicine from that. Instead of how do we treat a body, that was his huge distinction, and that is what unfolded in his analysis.

Female voice: So you are putting Heidegger versus Freud like how they see human beings, so what would be the narrative that they would have?

James: That would take as a little far afield at the moment. We could talk about that at lunch or something yes.

Female voice: following on from your...

James: You can ask, Janine will be glad to explain that and tells you week by week how her own analysis unfolded.

Female voice: But it is all was like what you're saying is if we worked out on how to coach people as opposed to how you coach bodies which may be the grounded approach of Flores versus how do we coach human beings, is that...?

James: I wouldn't draw, I wouldn't say that is what Flores, Flores was always aware that he was coaching the interpretation of the person. Fernando had I think Fernando and Boss would have a big conversation, if they knew each other they would be in agreement in a way. Although Fernando didn't believe in the unconscious. Which I don't quite know what that means but that is what he would say. I haven't talked to Fernando in a lot of years so I don't know. And I didn't have enough background in those days to jump in to sort it out a bit more. But one other thing that is from now it is in the title of this book, it is from Heidegger is Heidegger has this word Dasein, and this is the kind of being that we are.

0:30:09.3

Heidegger wanted to have a different term because he didn't want to talk about humans in the terms of the physician would use or an anthropologist would use or sociologist with use or a zoologist would use.

Stacy: And now I would even say integral in some ways. Didn't use that word but that is integral, he didn't use the word is that is how he was speaking.

James: And this is the foundation, I think this is to me a distinguishing place between us and other coaching schools is we are willing to say who is it that we are coaching? We were coaching Dasein, I am sure that is what you always...

Stacy: That is what I say. That's what [enrolled] everyone.

Steve: Who are your clients? Dasein.

Female voice: Instead of saying the life coaches we are just Dasein.

James: Dasein coaches yes.

Female voice: I read a book of psychoanalysis and Dasein analysis is psychoanalysis versus Dasein analysis.

James: That is right, so Dasein, so other coaching schools it seems to me, they have a way of understanding human beings that is the basis of their coaching. And it seems to me that they haven't made it explicit what those assumptions are. And my view is that a lot of those starting assumptions are pretty shallow and pretty inaccurate, Dasein is way better.

Stacy: To address the personality as a coaching school. We have one of the students with us, and she came over to work with us and she said that their premise was, human beings are really complicated, so we are not going to worry what that part is just a fix the problem. And this is a hugely successful coaching school. They are just way too complicated, don't go there. And I don't think they are, that is such a juxtaposition but I think there is way more of that than various of this.

James: Exactly.

Steve: Our whole philosophy is to coach the person which is...

Stacy: But their understanding of a human being is they are just too complicated.

Sarita: It is a great way out of yes.

Female voice: They coach at different places?

Stacy: Yes, I don't want to diverged too far from where you are but at the same time while we are in this time period I am curious Sarita, what did this enable you to go and do in the world?

James: It is undertake I'm going to go while she talked I will be right back.

Stacy: So I am a little bit curious to know what happened to you and the other students in terms of the world with this, what started happening?

Sarita: Well I was a manager at Bell at the time, and I stayed working for the company for probably 10 years after that. And they are saying there were three threads that were coming in through me at the time or into me at the time, one was organisational learning through Peter Senge, and I was very, very immersed in that work and putting that into the... Adding to the company. The other was this leadership development work which came from [Guruji Kasinski], the [Charley Crow] work. And then... And so one way I kept thinking how to bring it into the organisation when there is organisational learning and then there is development of people. And then the leadership development was both organisational as well as of the individuals.

I had not, the other part for me is that James's work was working on me and others, so it was the two [tracks] then, and I had not found coaches in my organisation that developed. They would perform as manage, but development wouldn't happen. So I was very attracted to learn how to be developed, learn how to develop my people, and teach my people how to develop theirs. So for me that was so practical and I don't know if we called it self-correcting and self generating then but in the organisation that I worked in which happened to be a cancer organisation even before I knew him, he was very interested in development. And he had that role for that company.

So the other part that enabled me to do was to understand because of the deep philosophical foundations which attracted me tremendously that it allowed me to understand the organisation and the people in them. And I called on my own anthropological groups which supported understanding, could understand organisational culture but this gave depth and breadth to it. For example, there was a particular division that I was in and I was using the language and practice piece from coaching as well as the mental model piece and things were disciplined which were still being written at the time. Anne both of those together helped support the convergence of two divisions, there were all sorts of reorganisation is happening. But it was done from a very human perspective.

Stacy: I think what is important is what was happening [to venture] but also how does this work going out into the world, because what you are describing is something that was the

beginnings of shaping how organisations began to see human development and how coaching found its way into the organisation.

Charles: There is also something that occurs to me Sarita how you are talking which brings out the question, the observation that the working on the, as a basis for working with others, is a structural foundation that was assigned to the class, it was fundamental. So I have a question about is it maybe mysterious but how does all of this then translate into this amazing design that now keeps evolving? And I can into it that reading and making things come together and all that but it would be interesting just to hear your view on how does all of that translate into something that is really an amazing way to support people and teach, as we know?

Sarita: I am not sure if I completely understand the question Charles. So the two tracks? How does that translate?

Charles: Well the two tracks are from the mental I would say design philosophy of the class, so everything is to keep that in perspective and is working on those two levels at the same time. And I'm just curious as to what other key fundamental assumptions about the understanding of human beings have translated into design elements in the class that we can point to.

Stacy: The body. Just basic things like in the company people came in with a body, and that was a unique, at that time it was fundamentally different. And it was not easy to talk about the body. I think when I look at mood and just the understanding what the mood of an individual or an organisation is, and being able to assess it, ground our assessment in it and work on shifting it was dramatic. Absolutely dramatic. And how the kind of things to do that which we talked about earlier, using what to bring in in terms of interventions.

I mean all of this seems passé, but at that point it was absolutely dramatic.

Sarita: And it is still dramatic in other things.

Stacy: And in many organisations.

Sarita: In many organisations yes, yes. Distinctions.

0:40:23

[Pause for break]

James: Okay, I think this was reading, this is good to note, good information about where did the idea of self-correcting come from? It came from two places: the book that Carrie just showed me help with this. So the Jesuits had this idea called contemplation in action, which is to not leave the present, not leave contact with ourselves, not leave our purpose, not leave our remembering and being close to God while we are in the middle of action. So that is one of the places it came from them about the other place it came from was Donald Schon's work, Schon. And his book is called Reflection in Action. Reflective practitioner and his method is...

Steve: *Educating the reflective practitioner.*

James: Yes it is probably two books. His first book is called reflective practitioner, all the stuff we could fill in later to be exact. This is when we stopped it makes it harder for me to... So his notion is that what makes somebody truly competent is not having a good theory, but it is in the middle of action to be able to reflect about how it is going and correct midstream. And he has lots of... For example it is in his book.

Janine asked me where some of the basic notions of our work came from. So the notion of distinctions is Flores. So he would always be talking about distinctions, and the distinction being an actor in language that points something out in all different ways distinctions could be made.

Stacy: And that is a big one that I took into the corporate world. That is the use of that.

Steve: James do you think that Fernando got it from Heidegger though?

James: Yes. Yes, I don't know how much of anything that Fernando does is Fernando. I really don't know but yes distinction is in Heidegger.

Janine: But Flores would have brought it in to the pragmatic use of it.

James: Exactly the pragmatic use of coaching. He would say in those days that was the basic job of a coach is to provide distinction, new ways for the client to see a situation. Whether the client wanted to see it or not, and even if their eyelids had to be jerked open that would be okay as long as they saw it. So one of the parts of the timeline I thought that we should put there is one of the things that you might see in this timeline is that our six-month class existed before our two-day class. So the coaching for excellence class, I was just reminded by Stacy it is hard to have a request of Sarita's which is, is there a format that could be short or two days that could be brought into her company Pacific Bell.

So she asked that is...

Janine: Do you remember when that was?

James: I think it is 1988.

Stacy: I definitely have all this data but I am 99% sure.

Janine: Okay then we have got your [four domain], six streams, 10 ways to go through in half an hour.

James: No problem. The other big landmark was when we came up with the idea of doing a [Urobon] class. It was our first one, 96...

Sarita: 94.

James: 94.

Janine: Was the six... Was it also the PCC?

James: No it was just coaching. So we had coaching and then we had coaching which was the six-month class and then we had coaching two which... Was a ten-month class.

Stacy: Then we had a week-long because some people wanted to have...

Sarita: Yes the coaching intensive so then we had a five-day class called coaching intensive. I don't think any of this is particularly important.

James: Yes the big ones are the coaching one, coaching two disappeared, although I think it somehow is in Africa at the moment, I think some of the ideas of what happened in coaching two have got steamed over to you guys and you are doing something with... And you are doing something with it I think.

Janine: It was also on [unclear] Canada that is the whole awards... It was during CTE and the ACC, that is what I took. It is different.

Stacy: Yes coaching two was just a term of like add-on that people over the six-month course who were worried about so we did that, has really I don't think it is important to the story.

James: Let's start it. So in 94 we started the year long certification program because we heard other people were doing the certification and we thought well we should do certification, in our usual way of doing things which was we announced the class and fill the class and then designed the class afterwards. And it was, who is this graduate here? No one did it.

Stacy: I was asked to come only two session 2.

James: Yes but you weren't in the whole class, so nobody, you were in 97, so by 97 however crude it was was way better than when it started. And the class got corrected all the time by how people were learning. For example we used to not have guessed clients and guest coaches. We used to have a day of bringing experts in to talk to people about how to start their coaching business.

Stacy: We had team coaching.

James: Yes and we used to have, we didn't have... For certification. It used to be different, we used to not have the reflective questions, we used to have coach the group you know yes. You guys are so glad. This is like being born in the right century when there is dentistry, there are vaccines. In the old days we had surgery, we just whacked parts off of people's bodies and stuff.

Stacy: And certification.

James: So the four domains.

Janine: 0:08:23.2 Are you going to talk about [unclear]?

James: Yes.

Stacy: Yes that is what he's going to do now is that.

Janine: You are super, is there a timeframe?

James: Yes we are trying to figure it out.

Janine: Oh super.

James: Yes so Stacy says that in 2001 is the first published use of the word integral coaching by us. I have been reading, I don't know when I started reading Ken Wilber, I don't know, it must have been somewhere in the mid-80s. His early things like the *Atman Project* and *No Boundary* and that stuff.

Craig: What were they calling it before because I remember in the 2000 is when I started, it was on this think about is it active coaching integral coaching was starting to emerge.

James: Yes we just called it coaching, we didn't have any great word for it.

Steve: Effectiveness coaching was one thing I remember in the class.

James: Yes one of them was coaching, personal effectiveness coaching.

Stacy: Ken wrote that article on regenerative coaching.

James: So Ken wrote the called regenerative coaching.

Sarita: Okay that was a little bit earlier, and then you wrote, in the newsletter you wrote an article in 2001, you had a two-series article that you called integral coaching, titled it at that, and also then when we went to the Cape Cod in 2001 the panel was there, we did a CTE there but we advertised it as integral coaching. And that was the first time that in looking back that I could see in print that we had called it that, those two things. So some time before that.

James: So I think that what used to be the quadrants before it became the domains was early on in the PCC...

Stacy: I think it was in the first thesis.

James: I think it was.

Stacy: Because that is when you, when they came in for session 2 when you wanted me to come into the models and the rest of it.

Janine: So that was 94. So it was already, because you would have had the 98 model earlier anyway. So how did you come up with the four domains?

James: Well Wilber had the four domains. But he has, and Wilber says in his literature that he got it from [Habermass] the same place. And he divided it, the world into singular and plural. And when we used it we of course made it away simpler than Wilber because we didn't have to explain all of human evolution all of cosmic evolution, so we made it really

simple. And I don't think from the beginning ours was mappable onto what he did, I think it was different immediately from what he did.

Janine: Ok and was that something you sat and just did?

James: Yes in those days I had collaboration with James in the morning or James at night. I had no friends, no one to be with me, I don't know why.

Stacy: Well and we would come in and you would say this is what I have done and you would show it. 10 ways was developed a bit later but yes.

James: Yes so that is what, so the six streams...

Stacy: That was the last one.

James: Was it the last one? Wow. So here is the story of where the 10 ways came from. So from the beginning, you look like the answer, so what I would say from the beginning of the PCC I would say always coach, if we are going to go for the long-term excellence [unclear] it is self generating, you have to coach people one layer below where they are in order for it to work. And everybody wrote it down, and after about two years of writing it down somebody said what are these levels that we are talking about.

So that is when...

Stacy: So you had them in your head right?

James: So then I... No, I just had this, it would be a good idea if... it's a Rolphing idea right, that you have to work with a larger structure in order to move one part. So the 10 ways has shifted a little bit over the years, it had different names at the beginning, and probably Stacy can look up what the different names were. This but I saying immediate concerns balance and conversations are always the same, I think we used to call vocation in life 101. And these really came from just me thinking about it.

But I will tell you what I was working on at the time Janine, I was working on the important movement was conversations power vocation. Because in my understanding the Fernando coaching took people to conversations and power. But what I didn't like about it was the smarty-pants aspect of it, as in I understand conversations and you don't, I can make things happen and you can't. I know that this is all interpretation and you don't, and you don't even know that you are making an assessment, and I know you are making an assessment. It was just, I can't quite give you the feeling of being in that Fernando world where you would have to say I think this bread is good but that is just my assessment.

0:14:52.9

Stacy: Seriously, if you didn't talk like that it would be pointed out to you but that is just your assessment. I mean... You had to...

James: And the whole point, and the explicit point of their work was to be powerful in the world which meant more than anything having, and this is the way we used to talk about

power, we are getting better at it, that power was getting what you wanted. But what was always missing for me in that was the ethical dimension, like your paraphrase you but what about the rest of everybody else? And what effect is your being powerful having on the community, and can everybody be powerful in the same way? So that is where the idea of vocation came from, and the idea of vocation is clearly from Christianity what was that?

Janine: The Jesuits.

James: Yes from the Jesuits. That there is a greater calling. So this is another place Carrie where the Jesuits come in. The Jesuits have a, foundational to their spirituality is something called 30 days, the spiritual exercise of Saint Ignatius. And the heart of that is what they call the disarmament of spirits, is being able to tell from all the different internal influences we have, which is really the voice of God. And they have ways of quieting oneself and getting sensitive and getting what we would call an internal feel and an internal taste for what that voice is. And that is what vocation is, vocation is discernment of being able to tell what we are called to do.

And I wish there were, maybe I wish that there was an academic foundation for the two boys but there isn't, it is based upon research, it is based upon my thinking about it and what would follow what.

Janine: You were reading about it...

Steve: Were you reading developmental psychology at that point?

James: No, I don't remember who I was reading Steve I don't know. Sarita reminded me that I was reading [Almas] at the time.

Sarita: Because some of the lower levels narcissism would say... And then also the notion of from Wilber of transcend levels, that came in.

James: Yes transcend and include. Wilber had definitely developmental ideas, and he was using [unclear] time.

Janine: Okay so I understand you got the conversations are fired up, and the conversations [powered] from the [flawless link]. Vocation came from the ethical [damages]. How did you come to immediate concerns and the balance?

James: Probably back to the five elements model as immediate concerns, certainly that is where the nomenclatures came from, the labelling at that level came from that. When we are flooded with, overcome with, worry, anxiety, just taken over by what is pressing on us, that those are our concerns that are freshly in the moment.

Stacy: And they would also contrast it with ultimate concerns, that is what we brought into the 10 ways.

Female voice: 0:19:12.4 When you say they were contrasted, in whose work?

Stacy: I don't know where James got it from but he did a roundtable on ultimate concerns, and in my mind that connected immediate to ultimate. Do you remember about that?

James: Ultimate concerns?

Stacy: But even the five elements model you said that came from Heidegger?

James: Yes that was from Heidegger.

Janine: You said immediate concerns, you have got past present and future from Heidegger but then immediate concerns was something you had added in, or does that also come from Heidegger?

James: Immediate concerns? The way we talk about it I think is us. Immediate concerns of, as a level of development, Heidegger doesn't have levels of development. He just has authentic and inauthentic.

Janine: And then balance, where did the idea between immediate concerns and....

James: Balance, I think balance just came from watching how, noticing how busy people were. But they were, they weren't in a crisis situation at every moment but people didn't have time to deal with anything. And they kept complaining that there was a huge gap between what they wanted to get done and what they were able to get done.

Stacy: And in coaching one isn't there some assessment that uses the eight domains that are part of balance? We had something to look to assess what peoples' lives were, community...

Sarita: Those were the areas of concern, we now call it areas of concern, we used to call them domains of competence. I don't know where that came in. Because yes we use those domains of confidence which is in the [FCC] course...

Stacy: Right and then we would say where people are out of balance in those.

James: Yes so that was probably existing in the PCC class that card with the, you all know what we are talking about, family and finances and all that.

Sarita: That was in the six-month course I think.

James: Yes so that is probably where balance came from is people being out of balance in those ... The seed of that idea.

Stacy: I remember too though when you first were with the students I guess in 99, when you talk to the 10 ways it was definitely clearly housed within the notion of human development. So although it is your model there is a lot of rigour surrounding what process human development is.

James: Right yes because I have encountered Susan [Coulter]'s work and Bill [Tolbert's] work, and Piaget and those guys.

Craig: But the big difference was, and this was something that always can over we need to, I find we need to also pursue this is developing a model say it is a revolutionary and once you have left you never go back, our model says it is very very integral and it is unified and it means that there is a much more systemic way of looking at it. Because you can transcend but you can also descend. So I think that is the fundamental difference it really is.

Stacy: And that most of the other developmental levels don't include the spiritual aspects.

James: Yes and most of the models like Susan [Coulter]'s is really the intellectual stream. And other peoples' streams are not as far as I can understand trying to explain the person's full life, just aspects of it. Like there are models of moral development...

Janine: Yes and physical development. So I know we are a little short of time, could we maybe look at the six streams?

Stacy: I want to say one more thing about the 10 ways though. I think they are really important, as far as I know most people don't end up coaching the ways, 8 9 10 or whatever which is you know all new staff or whatever, narcissistic whatever, you are not doing coaching levels of freedom and that stuff so much. So really the more practical sense where people are coaching people is the first four or five of them. And I think that all the pragmatic coaching that whether it was from Fernando or whomever, A) everybody else's type of coaching up until then that you are just coaching the ways up until, even up until power, where you learn these conversations, you learn speech act theory and you master conversations to say you are going into power and this thing about power what is that ethical dimensions and would I wanted and whatever.

So when you make the next [grade] location, and have the question that James says the switch from there is like instead of asking you know shifting it to what is the world calling you to do instead of what do I want to do unto the world, and licking that shift which is really the shift that adding the dimension of spirituality into the whole conversation: what's life about, I think that is you know like the most important thing in all of this because above that any other coaching school may be you didn't have the technology to do it but the topics that would come up were there. And I don't know that anybody else was asking that more than anybody else still doesn't make that shift to go okay so when you are in this progress of human dimensions that is the most important one, that is the big turn right there.

James: The six streams is really short, me answer Charles's question.

Charles: Just a quick word before we leave, because we were talking about this is like a point they make a framework for this and all that, and I wonder the extent to which we can anchor this model on observation. And I'm thinking about you know [Mick Russ] and [Don] have done in the panels, and the way in which they enriched the understanding of the different types. It was not because they go to literature, they actually observe people over and over and over. And I think that is how I get the model is by getting this nomenclatures and then seeing people through that lens that reinforces my understanding of it.

I think there is a grounding evidence and I don't know if you call it scientific but there is something valid about that being a method...

Steve: Okay so I could then it will be very happy with something, something built around the theory. Which is you go out into the world, you observe, you notice it, you don't have to do kind of a statistical study but by enough observation you see a pattern emerging and that is grounded theory, it is grounded in reality. I think this is where, if somebody said well aware of the heck did it come from, it is the grounded experience of people who actually observe are watching notice etc. It doesn't get validation on the matter.

James: I think that is totally true, and I think another way to grow out of this if we wanted to is to research that shows how much people are working and how often people report being overwhelmed and I have got the book, I am sure a lot of you know this book called the way we are working isn't working. Which is full of all the statistics about how sleep deprived we are. So that would be another way of grounding that this is where people are in that. I think that you can also talk about it, especially power and conversations, is all about the move to post-modern deconstructionist a way of looking at the world. Which is the other reason I wanted to fight against it because that tends to level the world and save no value is more important than any other. And I don't even care if that is true or not, I am not going to live that way. If it is more important to save a life and to... Just anyway.

So the six streams is a simple one. So it is, so competency models, everyone has a competency model. At one point I was hired by PWC to help them come up with their leadership competencies. You know consulting companies have to have their leadership competencies and they all do it the same, they asked their leaders. So what are these skills that allow you to be successful? As if they knew.

And then they hired somebody to say okay how could you observe that and what are the things that you would do, the experiences that would develop those qualities? Anyway so the idea of competencies is super simple. But I don't, is your question why those six?

Janine: Well how did you come up with let's find these six, first what are the competencies and out of those six how...?

Sarita: I recall one conversation where we were looking at all of the big lists that Wilber has. And then Howard Gardner's and the conversation was what is important for coaching, someone had a coach.

James: Because Wilber in his integral psychology book has over 100 streams of competence, which is hard for people to keep in front of mind 100. So we wanted to have less than that. And some of them, I think this was a pretty quick list, to me they seemed very obvious.

Sarita: I remember asking you what about the ethical, we were talking about the ethical thing, they were saying you can see it in the spiritual.

James: Yes and in the relational.

0:30:09.6

Janine: So when did this conversation happen and generated?

Craig: Well when I went through in 2001 2002 we didn't have the six streams. My recollection was it was added at some point like a year later, it was when I was first [unclear]. I remember the class had...

James: So that would be 2005?

Craig: 2003 maybe.

James: 2003 okay.

Craig: Something thousand, it couldn't have been earlier than 2002.

Janine: And what caused you to generate it? Somebody asked you...

Stacy: One of the places that it was first used was in the application for the course, I don't know of that is why you knew, but out of the question, the essay questions for the course, to apply to the PCC. And you had to assess yourself in these streams. And then at some point because I am just thinking logistically having to take the material from the application and we put it into a thing called six streams model, but that may not have been the actual Genesis of it.

James: So now I know that every time I have an idea I have to put a date next to it.

Janine: And say what is the Genesis, where did it come from.

Sarita: It is so hard because a CV is not a seed, it comes from so many, the alchemy of so many things.

James: But I wonder what was... Did someone ask or was it solving something?

Sarita: I don't know if this is accurate but it was still studying Wilber and the intelligences, and that that seemed like another thing to bring to our world. And selecting which were the six that were important for our coaching.

Janine: And also you said James by 2003 competencies was such a big topic in any organisation, it was the only way you are able to oversee people. The new way. So I am sure that...

James: So it is probably a confluence of that and also that as usual we were talking about in the class people be more competent. And the whole point of the class was to be more competent, and I am sure we eventually had to answer the question competent in what.

Janine: My question would be, because now we talk about the six streams in terms of your program design as opposed to just designing each of the names. The six streams are supposed to, so what could have been in the pattern there that caused you to say okay this doesn't enrich our practices?

James: Yes there had to, the idea of designing a practice for people is so wide so we had to make it smaller.

Stacy: And I think one of the ways it was saying that in order to develop further in the 10 ways you have to have a certain level of competence in these extremes to get to the next level.

Sarita: It was at least in 2001 because in the BLT I remember you were trying to slice the 10 through the four through the six.

Janine: What is a BLT?

James: Business Leaders Training.

Stacy: We did... It doesn't feel, and [Richard] was there. Maybe not as fully developed but for sure you have, it was in the work because we were talking about that. You had some convoluted crazy way of trying to slice it all up.

James: So the idea was to give people a cogent enough list of the one that would be manageable, and then to have the breath of the model be in the definition of the streams, because we all know if you, those of us who taught this, that any of those is pretty packed. You start to look at when we save the relational streams, all of what is in there the emotional stream... There is a lot in there.

Carlie: Okay so I know there is another big chunk we haven't heard which is a narrative.

Stacy: I was just going to say that but then movement from grounded assessment, station and [unclear].

Carlie: Yes and my suggestion was, I will keep recording on the audio, your session, our session this afternoon, and although it may not trace the history maybe you could give 5 min about how the [flip packer] on there.

James: A lot of that happened as one of our retreats, where were you today?

Carlie: [Italy].

Craig: [Italy].

Carlie: It was the first...

James: So the second one that we did.

Craig: You grounded [Italy], you had the idea before.

James: Yes and I remember it wasn't an easy sell.

Stacy: You had been shopping it around before that, they didn't like it.

James: And the short history of how it happened was the word distinction was so difficult for people to get even in our brilliant explanations and examples no want to get it. And then assessment, people hated the word assessment because it made them an expert and separate

and a better than people and they thought it was too scientific. And I probably was reading a book about narrative at the time.

Janine: Well the interim piece for this Craig you tried it and then James said what are we doing... It was the gift, your gift, there was a whole piece that we did in session two I think, what is the gift that you bring. And then that kind of diet, I think it was the interim piece that you told me. The grounded assessment... There was this short lived but.... And then I think the year after that I think you became really specific about invitation. So the following retreat is sort of incubated I think it was in 2008 so I think it really, really said okay what about invitation because I have got some notes from that.

Stacy: From enrolment to invitation.

James: Yes inviting people to a new narrative.

Craig: I remember a little piece of the story Ira was that...

James: One second this is what is so funny about, this is how the Bible is also constructed. What did he say and where did he say it? What did he mean?

Craig: I remember it was you were reading I think it was a book on conflict resolution, they were talking about the narratives of different people. It was one of the book study books, and you had taken a book on vacation the two of you were up on the River or something like that, and I remember getting a call from you James, while you were on vacation you were very very excited and you said I have to tell you something, I have to tell you something, I had a big cognitive breakthrough. And then you told me about the shift from assessment to naming narrative and then a distinction to providing narrative. And I remember being very sceptical.

Stacy: We all were.

Craig: But I remember that...

James: I think it is a brilliant switch because narrative is so easy to teach. All the PCC makers know this joke yes.

Stacy: I never thought there was anything wrong with distinction personally. I really like that, I think it is clear and easy.

Steve: In some parts of the world we still teach distinction. Because I think distinction is a fundamental part of...

James: Yes it is, it is.

Male voice: 0:38:58.1 Yes because you know what you do at session 2, you can't have a new narrative every time. You are an octopus, you are a whale.

Stacy: Now you are a whale with octopus hands.

Janine: So I have a question, it might not get answered here but by the material in ECT is what it is versus possibly other...?

James: Why what?

Janine: Like why is the five element model in the ECT and not in the PCC? Why is the six streams not in the CTE that kind of thing?

Sarita: We only had so much time, and by the time we have talked structural interpretation the [prints], you have got those concepts through plus the I we it model; people are finished. No we do the five elements.

Janine: I don't think it is in the new curriculum.

Sarita: She hasn't learned the new one yet.

Janine: The domains, the four domains.

James: So there is one answer, here is another answer. We are never going to have a definitive answer about why, it is always going to be multiple. One of them is... I want them to be non-repeating curricula so that you learn something different. And also the idea of the two-day classes a lot of people just take the two-day class and we never see them again. So can we leave them freestanding?

Janine: Which is why, why not look at the six streams, because we look only the three, we only look at three streams and we enforce three streams, and everybody or not everybody but in every class there is somebody that says why not the spiritual? I am like yes actually we do have the spiritual but we teach that in the one-year course. But here we only reinforce two.

Steve: I think the answer that you have just given is really profound. I mean we take people for a year and a half for example. We don't do a year and three days. And there is no way we are going to teach the same again and again and again. What we are doing is we are actually evolving. So it is almost the core models actually are extended and expanded, because we don't change the models we actually just deepened them and broaden them. So I think the core and the essence remains the same, I think what we are doing is saying so here is one level and just get that. I think the people who ask those kinds of questions are people who are saying we are probably already ready to even be at PCC, the people who don't ask those questions we find actually never come back to PCC. They are happy with what they have got, they start to apply it. So I think it is a case of saying we teach the core and then we deepen it, when we deepen it we work with people for 18 months, and there is never any conflict between you told us this you told us this and different things, I can see how they have deepened and broadened.

James: A third answer is multiple coming in off the street are not your friends but just people off the street don't understand that spirituality and coaching have anything to do with each other. So they are going to start I am coaching my guys on the line making car parts, so why are you bringing in spirituality?

Sarita: But then that wouldn't go with the issue that we look at structure of interpretation in the CTE, and we don't look at it in the session we explain narrative in the PCC. So that got me really confused because as I understand structure of interpretation is like the umbrella concept and the narrative is what is within it.

James: It is not confusing, who was confused are you confused? You are confused.

Sarita: Let me just explain it for a minute because we have already done the..., Great dialogue, and I think to record... Here is where we are just so we can all hold it in our head and make it up to this shift from creating a grounded assessment into a rotation for narrative. And it sounds like there is a lot of discussion beyond that. I don't know how they will be able to come back but at this point we are in 2007, 2008 and many of you are part of the group, we can start to spread off and show some other branches to the work at another time. But why don't we stop now, wrap up, and if you have taken notice on any of the stickies just give them to me and I will stick them up here or other ideas. Okay thanks James and Stacey.

Stacy: Should we spread this like in the front hallway or something? I mean it seems a big enough place for it.

Craig: There is something very compelling which we have not yet talked about at all and that is the [humanist]. All these models it is useful and it is all that can be captured in an academic body but for me it was advanced learning in the [Cadena] which gets included by the teacher of the class, but there was nothing even said about that.

Sarita: The development of the faculties. How are we teaching, we haven't talked about how we teach.

James: This is all we have got so far.

Janine: So the how would be another whole thing that we need to talk about.

Sarita: We removed this so that we can have lunch here, I'm sorry Janine.

Janine: And did you think people can help us rearrange... The deal I made with the kitchen.

[End of recording]

7.3. Appendix 2 – Transcript – Interview with Stacy Flaherty, 19 October 2011

STACY FLAHERTY: [Introduces herself and explains role at NVW]

MARK HARTNADY: Sure, and thank you for clarifying that and that was my understanding, it's good that comes from you. In terms of introduction, thank you, whatever you want to share is great. So, from that perspective, I mean, absolutely, I totally understand that the whole integral coaching concept is the brainchild of James, nonetheless in the interest of kind of writing a robust thesis I need to get as many perspectives as I can that are possible in a data gathering effort, so what I'm really interested to hear from your side is what your

perspectives were from the beginning. When did you first meet James, what were your perceptions of the major influences that he had in developing various models for coaching and so on? Maybe you could start with when you met James.

STACY FLAHERTY: I met James in 1975 when we were both getting hired at est. Actually in the order of things, the Jesuit teachings came first he was obviously involved in, went to (?) high school and was very involved then with the Jesuits and I've heard his oral history of that time quite often but when I met him he had left the Jesuits after a year because he felt restricted by the priests were all having essentially one relationship with God that was primary and everything else was secondary and his view really was that, put in a more Buddhist perspective, we are all God and he wanted to be able to relate to us, people, he could see that these priests were all, it wasn't for him, so (?) and he had his dear friend Nick who he met in the seminary and Nick left the seminary a year later than him and moved to San Francisco and discovered this exciting new thing called EST, in the mean time James went to college for a year and left college to move to San Francisco to do this EST thing and then we both got hired by that organization, so we both not only did the EST training which was a work, personal development, enlightenment slash workshop kind of thing but then we both became so attracted to the intentions of that approach that we decided to work for the organization, we went on staff and in fact where I believe I met him for the first time was in the orientation evening to be going in staff, there is a staff orientation meeting and there were three of us in that meeting, James and me and (?) and went to work for the organization and so we were, that was an organization that was more than full time work, it was like joining a mission, so you worked first of all, incredibly long hours, then you went home and worked at home, you devoted your life ...

MARK HARTNADY: This is EST you are referring to. Sorry, do you mind if I interrupt you as you go along, just a couple of things. What is Nick's last name?

STACY FLAHERTY: Nick's last name is Hobbs, but he's passed away. He can't be interviewed.

MARK HARTNADY: OK, not in the traditional sense anyway, so, just a little bit about EST, I believe started by Werner Erhard, can you just explain a little bit, what the intentions were how that evolved, what position is EST in today and so on.

STACY FLAHERTY: Well, James would have a much more precise, be able to give you the exact philosophical pieces that Werner brought together in creating EST because he would know that and I don't know that, but it came on the horizon probably 1971, around there, I think it was probably founded in 1971 and EST supposedly stands for Erhard seminars training, you have it on your document in capitals. They would have always done it in lower case, that was their logo, was in lower case and the idea was that it actually didn't stand for Erhard seminars training, it was the Latin verb, to be, being and the intentions of the program were for no less than world enlightenment, but they intended to accomplish this by having each person recognize their own causality in the universe which I don't think is true, I don't think its not true, you get into that mood(?) territory, but the point was shifting people's, I think the essential point was shifting peoples point of view from being a victim of life to being a source of their own life. I think that was the key intention there and they had various methods and exercises and ways of going about that, but the point was, take responsibility for your own life and you can in fact influence the world and again I think they took that too far

by having people come out of there who were true believers that really thought that they could make a bus stop with their own kind or something. There is truth in it and there is misunderstanding in it and that's where a lot of problems arose, but that was the attraction in it that you could take ownership of your life and you could have an influence in what was going on in the world and there was a broader mission, you often heard the term when you were there, having a world that works for everyone, so for myself and I think for James as well that was the attraction, its oh, here is somebody who is out to have the world try out for everybody, the starving in Africa, blah blah blah, going to have this happen and not only that, here is a methodology, something you can train people to do where they can actually make a difference, so the good news and the bad news, there also was that key component of EST which you will see, it was markedly absent from new ventures west, was this, you were charged with essentially finding more people to fulfil this mission which I think in some Christian faiths, you have missions and they go out and you're supposed to recruit, there was very heavy duty recruiting piece with EST which you felt compelled to do because you had found this thing, it was your responsibility to help everyone else find it so they could help and we could all be in this big movement and change the world but when I finally left there I really recognized the cult like aspects of, even though I don't think it was completely a cult there were definitely cult like aspects which was part valiance(?), but I think James's attraction to it there was the same as mine which was to do with that whole wanting to change things, so when ...

MARK HARTNADY: You remained at EST for how long, it was 1975 was it?

STACY FLAHERTY: Let me think about this. How did this work. I took the EST training in February 73 and I think James took it 74 and we both went on staff there, this is so weird I can't remember exactly when I met him. I don't remember if it was in this meeting that we met, I know we always talked about this story, but we were both assisting, is what they called it, volunteering between the time that we took the initial workshop ourselves and then when we were hired and we were hired, we were there for, I was there about 2 years I think the first time and then I left and came back later. Hold on, somebody is buzzing me. So lets see...

MARK HARTNADY: So it was circa 1973, 75...

STACY FLAHERTY: I think he was there, he was probably there on staff 75 – 76.

MARK HARTNADY: Anyway, I can ask him.

STACY FLAHERTY: Yes if there's differences in his dates you should take his dates for sure. He keeps journals of his whole life, he knows exactly when everything happened, so part of what happened there was, well, first of all, I got fired from the staff which was heartbreaking for me, but also the start of my disillusionment there and my backing off a little bit, still, I was still very committed to their mission and even after having being fired and going off and doing my own thing for a while I actually came back and started working for them again in 1978. James and I got married in 77 and came back to work for them in 79, a couple of years, in the mean time he had become more involved with them, he wasn't on their staff any more, he had entered their leader training program, so he was trained to be a graduate seminar leader, first a guest seminar leader which was the first, stood in front of the room and got the new recruits interested and signed up and then the graduate seminar leader who is entrusting people who had been through the basic training and was doing their (?), he

had entered that training with them and I don't know that he had been in front of the room teaching before that time, again, he could clarify if that is true, but that's the first that I know of that he began being a formal teacher of some kind and the rolfing sort of was started, came in here because we had got married in 77, was he still working there?

MARK HARTNADY: And his rolfing experience came prior to EST?

STACY FLAHERTY: No, not prior, while we working there, around the time we were volunteering and working there, we got exposed to rolfing as modality, like we'd see rolfing and he got very interested at that point in doing the rolfing training which he went and did 78 I believe, so it was after we were married.

[audio 00:15:00]

STACY FLAHERTY: He had also, while he was working at EST he had got trained as a Shiatsu massage therapist, so he was getting interested in body work already and he had learnt Shiatsu massaging and gone back to college, he never finished college, so went back to college and took the science stuff he needed to get his massage degree, so that he was getting involved in that and also I had, he will remember, I don't remember, when we were getting involved in this, I remember at some point in our early marriage where he was out of a job, I was trying to get him to go do something.

MARK HARTNADY: That must be quite a privilege being married to a Shiatsu massage therapist. Although no one likes to come home and do work. OK, and then, when you both left EST, there was mention of the founding of Herminet?

STACY FLAHERTY: Herminet, that's the name of the company, Herminet and it was, so Fernando Flores had come to the United States, you can look him up on the internet, but he was the youngest minister of finance ever in Chile and his government had just done an overthrow, I've just lost visual, I don't know if you can still hear me?

MARK HARTNADY: Yes, sorry, I'm cutting my video off because the connections a bit weak.

STACY FLAHERTY: That's OK, I don't need to watch you taking notes, I just want to make sure you can still hear me. So amnesty international have brought Fernando to the US and we paired up with him, we were still involved here and so its, lets see, 79, 80, 81, 82, around there, I was back working for them again and James was not on staff there but he does a seminar later and Werner brought Fernando over to EST to bring what he was doing with callosity of language and offer some workshops to the EST population so Fernando is this very interesting character, he is very fierce and he's very, he's brilliant, but he's very...

MARK HARTNADY: Assertive.

STACY FLAHERTY: He is very assertive, thank you, I just wanted to see what part of his personality I wanted to describe, its quite unusual. He's scary when you first meet him, he's scary. He can be sweet and gentle as well, but mostly he can be scary, and he has very strong emotions around his ideas which are the most important thing to him, so he had done this study about, he had all these ideas about John Searle's work and Austin's; work about

philosophy and language and he had invented this whole, he had taken that and developed it into a workshop for Werner that they presented called the action workshop and they took this philosophy and language and the elements of request and put all this, put it together into a workshop and started teaching it and so this was much different than the kind of work Werner had taught before, but Werner was embracing it and sponsoring it and really, Fernando had got this great advantage of being able to, he had this world wide audience of people who were willing to listen to him just because Werner said so. He had this brilliant stuff that James really liked.

MARK HARTNADY: So just to recap, Werner was getting Fernando's experience and understanding of the exposure to John Searle's work on speech acts and the philosophy of language and wanted Fernando to develop a workshop and in exchange Fernando was basically getting access to a wide audience, a bit network.

STACY FLAHERTY: Yes, Fernando was this young, brash, brilliant philosopher, broke, who hooked up with Werner who was this big, famous, rich whatever and so they piggy backed on each other, Werner had the prestige and knowing this guy who was brilliant and offering his stuff and Fernando had a place to teach and so I, somewhere in there 82, I'm going to get the dates all wrong, James will have the dates, 82'ish or something, we took the action workshop, Fernando and James made a good connection, Fernando liked me, Fernando liked James, whatever, James started this, I'll talk about this later, but, we don't have to go into it now, cause I'm going to get off track, but they developed a relationship whereby James started studying privately with Fernando, but meanwhile what was happening, Fernando, EST was downsizing and I was being moved from my position in EST which was working very closely with Werner at that point to a different role and I didn't want it and I was asked by Fernando to go and be his personal assistant, so I did that, so I drove Fernando around for a long time, was his personal aid for a few years from like 83 – 85 and found out in doing so what disdain he actually had for the Werner.

MARK HARTNADY: Interesting, do you know what the source of that disdain was?

STACY FLAHERTY: Well, Werner was not, I don't think Werner is an original thinker, Werner is very good at collecting other people's ideas, other people would say stealing other people (?), it really depends on your point of view, but certainly, utilizing other people's ideas and putting them together in such a way as to develop his own work, but he wasn't really an original thinker and that is very important to Fernando and I don't know what else happened in their personal relationship or if Fernando may have felt used, even though I think he was using Werner just as much. I would just be completely speculating but, well, even the first thing I said is speculating, but I think that's pretty, I don't know who could dispute that, that was just Fernando's whole identify, with his brain power and his ability to, just like creating, creating and Werner looked like a flim flam man to him, just was like the circus worker, like corralling people, come see the famous Fernando Flores, but he didn't have respect for him as a thinker, so in the mean time, while Fernando was doing these workshops for Werner, he created his own company called Herminet, Herminet its named after Hermes, the God of whatever he's the God of, but he has wings on his feet, he's for lightening fast communication and things anyway, so he named the company Herminet and he's starting to generate, building his base on the side so that he could be independent of Werner and in fact he started offering the actual work which (?) timing at all, changed from being EST to being Landmark, so now its called Landmark. So I went over to work for Herminet and James

started teaching the actual workshop for Fernando for (?) as well, so they are in that bridge that he had started working for Herminet for Fernando privately and this is a big, this is a hard part for me, he should say it best, about his education because its, he often says he got ten years of philosophical training in 2 years by working for him, but they had an exchange whereby he would be Fernando's aid essentially, one day a week or two days, he would just come and do errands essentially for Fernando, be his errand boy and in exchange Fernando would take an equal amount of time, sit him down in his library and talk to him about philosophy and just do one on one teaching with him and tell him what to read and they'd discuss it and had this world class education from this guy for free, for exchange, so that's where he really learnt a lot, that is what really got him back into reading philosophy again and reading all the things that he has now started re reading cause he liked literature at school, he was always a reader, he was a thinker, but he had sort of gotten away from that and when he first started Rolfiging with Fernando, which is how their relationship started, he was in the action workshop that Fernando was a student and he heard that James did a Rolfer, he said, what is this rolfiging and James just laid it to him, he said, do it to me, so he came over and he Rolfiged Fernando and one of their rolfiging sessions, I guess Fernando saw some of this books or something and he said, do you like books and James said yes and Fernando in his completely characteristic, totally egocentric way said, I'm probably the best person in the world to talk to about books and so was just true, he didn't bother about not being arrogant about it, he just said, I'm the best person to talk to in the world about books, so James said OK and that is when they came to this trade agreement and that was really the beginning of James' strong philosophical education that brought this whole thing about. So he started right from Fernando then he started teaching Fernando's workshop which involved getting lots of unasked for criticism from Fernando.

MARK HARTNADY: Can you remember more or less what time that was?

STACY FLAHERTY: Lets see, I can work backwards from when my daughter was born, 1985, so I think the rolfiging probably started, I think 82'ish, just put question marks by these dates and James can for sure tell you, just so you can sort of sketch out that.

MARK HARTNADY: When did James start teaching Fernando's workshops?

STACY FLAHERTY: I would guess 83 and 84.

MARK HARTNADY: So around that time more or less.

STACY FLAHERTY: Yes.

[Calls back]

STACY FLAHERTY: OK, this is fine for me so far. John Hanley, so our daughter was born in 1985 and somewhere around here, Mark, its not only that I don't keep journals, its that my long term memory is horrible, I can't remember phone numbers and social security cards, I'm just bad at this stuff, so James, how did this work, what was he doing for a living, damn, I wish I could remember this stuff, so what happened was, he formed a partnership with his friend Keith Bailey, Keith was a consultant and Keith is alive and could be interviewed, but I don't know if he'll have anything relevant to say to this, but he formed a partnership with his old friend Keith Bailey.

[audio 00:30:00]

STACY FLAHERTY: Keith was a seminar leader from EST so we knew Keith from then and Keith had a consulting firm with another partner and this is all 85'ish, you will really have to talk to James to get better on the dates, but they had a consulting partnership and they invited James to join them and James joined that partnership for, it was just a few months and James had never been in business before in this way, he was, I know its history, he's a massage therapist and he worked for the telephone company as an operator in high school, he does not have corporate, he hasn't been in the corporate world and yet he bought a suit and tie and went down to do consulting with these clients these people had, essentially based on what he had learnt at EST and what he had learnt from Fernando and the thing is, at that point, EST was quite popular, but not everybody in the world had done it yet and there were some pretty radical ideas in the EST training that you could bring into business and people would go, like what, be responsible for your own life, have conversations for action, this stuff was revolutionary, so even though, should have got business, he could go in as a consultant and do stuff with teams and they would be knocked over because they'd never heard of this stuff, so he, so right, so he was only with Keith and this little team of people for a short time when I don't know Keith decided it would be better for the two of them to split off and be on their own, so they did and they opened their own company and Keith knew John Hanley, how did this come about exactly.

MARK HARTNADY: Just to recap, Keith split off with James to form a new company, what was that called?

STACY FLAHERTY: Exactly, that was called, really I don't remember what it was called for the first 5 minutes, I think it was called, its on the tip of my tongue, I don't remember, but it was called something for 5 minutes until they became partners with John Hanley which happened pretty darn fast, maybe that was all the same move, it was very close together and at that point the company was called Break Through Learning, so it might have had another name before that, but as soon as they were partners with John Hanley it was Break Through Learning and what happened was, John was the full owner of this company called Life Spring which was kind of a competitor to EST or in the same general, I don't know if a competitor, but it was the same general field, it was a two weekend workshop, it was about taking your own power, having your own enlightenment, whatever, it was a personal development in those days. I didn't do Life Spring so I couldn't tell you exactly, but it was close, if you did one, you didn't do the other, they were kind of competitors. So John had this Life Spring thing and it had been going for a while, but he was really wanting to bring something businessy in there, so he made a deal with James and Keith to create this company called Break Through Learning of which he would 51% and Keith and James would 49%, so that he always had the power to do what he wanted with them and his deal with them was, you bring this action workshop stuff and project management into Life Spring because I want to broaden my offerings. In the same way Werner had brought Fernando in to kind of update his offerings. John Hanley wanted to bring in business and business development and that kind of thing to his things, so his deal with them was, you will create a workshop called The Business Acceleration workshop which was essentially project management, time management it might have had a bit of the speech theory in there and we'll offer it, I've got centres around the world and we'll offer it to those centres and so that is where John Hanley came into it. I could give you lots more about that partnership and how it went, I don't know that it really

influences how coaching came about, other than the breakdown of that relationship which is exactly where coaching came about. In fact this is where coaching got invented because while James, Keith is also somebody who is a wonderful person and I love Keith and he's a dear friend, but between the two of them, James was really the thinker of the pair, so Keith is very creative and he's an artist among other things, he's a mover, he knows how to put things together and he knows how to shape things, but he's not like reading texts and developing new ideas, that's just not his role, but he could do stuff that James couldn't do, he knew all about business, he was quite schmoozer, he could make connections, he's from England.

MARK HARTNADY: Like a true consultant.

STACY FLAHERTY: Lovely British accent. Yes, like a true consultant. Exactly, so James and Keith, mostly James put together a curricular of this business acceleration workshop BAW and so, not that it matters really, but the problem was the way John Hanley had set up the offerings was that each of his centres was independent, they were like franchises and he offered them this new workshop with James and Keith but he set up the financial arrangement so that the centre managers were each, they were compensated on the number of enrolments they get in, there is some complicated franchise business arrangement that devalued the workshop that James and Keith had, so centre managers kept putting their attention on workshops that would make them more money, so that this is an acceleration workshop, not by virtue of anything else than that, than bad marketing plan, wasn't getting a lot of success, so James, so this is where it happened. James has a brand new daughter, our daughter was born in March 1985, this is like 1986, the classes are floundering they're not doing well and they're not bringing in income, so we can smell that John is getting ready to dismantle this thing, he's not happy because the workshops aren't selling. Of course they're not selling because there is no incentive for people to sell them, but that is beside the point, so James has a visit from his father who is also now passed so you can't interview him in the traditional way, but his father was a business consultant and a strategist all his life, that is what he did, so he came in and visited James and Keith at the workshop and started giving James all this advice about how to have this company, Break Through Learning succeed, so he started saying, you're seeing these audiences every week, what else can you offer them, what else can you sell them ...

MARK HARTNADY: What is his dad's name?

STACY FLAHERTY: Edward B. Flaherty. So his dad is giving him all this business advice about how to keep the company alive, what else have you got, what else can you sell him and also advice about cutting costs, traditional consultant type stuff, so James thinks about what he's been learning from Fernando about coaching. So Fernando had actually been using this word coaching in the first that we know of, in the non sports related sense. He hadn't been teaching classes in it, but he had been using this term and James said, I know about coaching, I can teach them coaching and so, I'm pretty sure he got John Hanley's permission, but he started offering, he offered three iterations of his coaching class. The coaching class which is now pretty much what Janine and Craig offer for their accelerated (?) ECC course, whatever the 6 month program is, so he invented that class, much earlier version, but he invented that class and offered it in three cities, San Francisco, Washington and New York, or something, Boston, 2 east coast cities and 1 west coast city, that I could look up and tell you, but I don't know that that particularly matters, but he made this up and now he's going to offer this coaching course but what I can tell you is, that he had invented the beginning of the course,

he hadn't invented the end of the course, he was inventing it as he went along, but it was originally like, we can sell this to people at Life Spring, we're in the business workshop, they might also buy this and so he had, so we offered 3 of these classes, we had collected money from some of the people, some hadn't paid yet and the classes had started and just then John Hanley said, OK, I'm done with this experiment, this isn't working, I want to close the company Break Through Learning, remember he has 51% so he can do whatever he wants. So Keith wasn't really involved in this coaching course, James had made this up and James was teaching it on his own, like I said, James was the thought leader here and Keith was the salesman, so in a miracle moment, James and I and Keith and John Hanley made a deal and said, OK, tell you what, how about if rather than stopping these course, sorry that was my private line, James was calling, so we made this deal and said, OK, instead of just shutting down these classes mid class, how about if you just let us bring them into our company and we will collect the rest of the monies that haven't been collected yet and we will bear all the expenses that haven't been spent yet, like travel to these other cities and we will finish teaching the classes, let us inherit those in whatever condition they are in and finish them out.

MARK HARTNADY: Inherit them from Life Spring?

STACY FLAHERTY: From Break Through Learning, so in other words, John could have said, you invented this while you were an employee of Break Through Learning, therefore I own it and I'm not going to do anything with it, but you can't do anything with it, he had the power to say that, because they were invented while James was working at Break Through Learning, even though John had nothing to do with them and couldn't have reproduced them in a million years if he wanted to because they were inside James' head and nowhere else, they weren't even out on paper yet, but he didn't say that, he said I don't care, coaching, what's that, you can have the coaching courses and we said, well, we want this one Apple computer to because we didn't have a computer, so they let us take, we took 1 computer and we took ownership of the coaching courses and we got out and they closed Break Through Learning and new ventures west was born and actually existed, you'll find lots of mix up dates about whether new ventures west was founded in 1986 or 1987, it was actually founded in 1986 as a company for James to deliver these other workshops he was delivering, another thing of Fernando's, like an action workshop of Fernando's, he was teaching under the auspices of new ventures west in 1986, but that wasn't coaching, he wasn't doing coaching then, so 1987 was when we moved to the coaching courses for Break Through Learning under new ventures west umbrella and broke our ties with John Hanley and Keith and James and I remained good friends but we stopped being business partners at that point and James went on and finished these three coaching courses and tried to teach some more and at this point, fortunately, because she was a Life Spring graduate that had been exposed to James in the business acceleration workshop, Sarita Chawla, who is one of our senior leaders as you may have heard of her, was in that very first coaching 1 course that James did in San Francisco back in 1987 and Sarita was working at the phone company at that time and she gathered all her friends and she was the reason new ventures west existed at all because she is an enrolment machine.

(audio 00:45:00]

STACY FLAHERTY: And she can talk to people and say this is the best thing ever and get people to do it and she kept us alive by selling James' idea of coaching in the phone company

so we had a cash flow for the basic years when we were getting going. So that's where coaching, new ventures west coaching as today, was birthed.

[audio 00:45:00]

MARK HARTNADY: Makes sense. You touched on a little bit about the, just talking about that IP, so the courses that were developed, are those the same courses that I have written here, those coaches to excellence, professional coaching, associate coaching courses, all running for various lengths of time.

STACY FLAHERTY: Well the associate coaching course which is for 6 months used to be called coaching one, first it was just called coaching because there wasn't a coaching 2, so you just called it coaching, you call it coaching evoking excellence in others which he later named his book, so then we just started, by that time he had also added a second iteration of it, so the 6 month program which is the very first one started out as coaching evoking excellence in others, later called coaching 1, now called the associate coaching course. It has of course morphed over the years in terms of the content, but the lay out in terms of 3 sessions and homework in between and all that was the original design and remains. So after he taught that, after that one existed then I think the chronology, so I think, after he finished that class, people wanted more, so that is when he made up another class which is a 10 month class so I remember it was 3-4 sessions, they were all just like weekends and several months apart, so there would be time in between for learning etc. Where were we?

MARK HARTNADY: You were just explaining about the courses, you were explaining the morph and evolution.

STACY FLAHERTY: Coaching 2, so that was, in the meantime I told you about Sarita, Sarita you know was really trying to help us get this going, she was really excited about this work, I don't think she took it on as her mission in the beginning to save new ventures west, although she did, but we didn't know what we were doing, we didn't know anything about selling, about marketing, we didn't know anything about anything and we had this wonderful advocate who had this influential job in the phone company, so she said, can you put something into a 2 day format, I can sell that and he said sure, so he invented the coaching excellent, the two day class and she took that into Pacific Bell which is what it was at the time, its now changed hands 12 times and its now AT&T, but what was then Pacific Bell, she took the coaching to excellence class and put together two day classes to expose people to this work and then later what happened was somebody in their internal training company, so then we got the course sold to the internal training company, the internal education division of the phone so they sponsored it and we were doing 3 and 4 coaching excellence classes a month, all up and down California, teaching the two day class in the phone company, that said, so the 6 month class, the 10 month class, the 2 day class and then the professional coaching course, there were a few other classes that were invented in the mean time that don't exist anymore Mark, just again, different ways of packaging and selling this, so we had back in the early 90's, they were talking about, quality? This is before your time, I think it was called quality movement or something, inside corporate, so we had the 3 day class that was aimed there and then we had a 3 day class that was about coaching for executives, there has been different iterations of it that didn't last, that were just different ways of formatting it, but in the early 90's people talked more and more about coaching as a profession and (?) certification, so

that's why James put together the professional coaching course and he put this together in 1994, we offered our first two of them, one of them in 1994 and ...

MARK HARTNADY: Just can I intercept there, this interest in coaching was a kind of phenomenal in the US at that time, so my question is really, if the original language of coaching came from Fernando and James picked that up and used that to package and brand his workshops, how did the national or global phenomenon get the name coaching as well?

STACY FLAHERTY: I don't know, that is James question, sorry I just don't know.

MARK HARTNADY: OK

STACY FLAHERTY: I mean there were a couple of other people I know that when we first started doing it, I don't know, I was going to speculate, but James would have a ready answer for you there.

MARK HARTNADY: May well just be coincidence.

STACY FLAHERTY: I don't know that Fernando was the originator, he may have been the originator, I mean, things like that with words, no one, its very hard to pinpoint the exact source, but James probably knows more about the different, who the different people were that were talking about it that way and how it came about.

MARK HARTNADY: OK, should we move on?

STACY FLAHERTY: Sure.

MARK HARTNADY: So, the next thing that started coming out of that session was this idea of spirituality and for me what's not clear still is how spirituality related to integral coaching and specifically what new concepts did that bring to coaching that were not there previously, so I would imagine this is something that has come about recently and I know James would probably be the right person to ask in more detail, but what is your perspective on that?

STACY FLAHERTY: Let me just think for a moment how to respond to that. Well, obviously it all depends on ones understanding of spirituality, but I can tell you that from the very first coaching course that James taught, he had a reading list of 12 books on his first 6 month class which is for somebody like me who doesn't read, that is laughable, but even for the people in the class, it was like we're supposed to read 2 books a month in addition to having a job and doing all the other work in the coaching class, because these were not easy books and why I'm saying that is because I think one of the books was the Denial of Death and one of the books was some or other (?), philosophy, but I think he was bringing spirituality into it as a, like he's just a spiritual person and that was part of, if you're going to talk about human beings, if you're going to talk about what is a human being and how human beings change, that has to be, that is what you have to talk about, which was completely different than how, my understanding of the other coaching schools that exist, where they were coming from at it. For instance, coach you, which is one of the very first other coaching schools that started and they were always telephone coaching thing, they were a school that was full of tips and techniques because we got their literature when we were first starting out in 1994, we were first, so 87 James does this coaching one course, but it wasn't until 94, 7

years later that we did the professional coaching course, so at that point we found out that other people were starting to do certification programs too and we saw coach you start and that was all tips and techniques and conversational moves and very much in the cognitive domain, a mental dance, if they say this then you do that, and if they say this then you do that kind of thing. Even schools that we really like, like Newfield, so Julio Olalla who runs Newfield network was also trained by Fernando at the very same time as James and Julio had to focus his approach to coaching on the relational, I think, more than anything else, he used some of the speech act stuff, and he's used moods and he uses, but I think a lot of his coaching work has to do, I don't think its not spiritual, I think it is spiritual, just because spirituality is everywhere, but he's working with relationships and deepening relationships and making connections and all those gooey luvvy stuff, but no so much faith going face on into death James has always been talking about death since the beginning, I mean death isn't, I think you can talk about death without it being a spiritual conversation, but I don't know why you'd bother, its always been present for him and its always been a little bit tricky in terms of, do you say the S word when you're trying to sell coaching and corporations, you don't necessarily say we're going to be talking about spirituality here because people are like, next. So since the very beginning that's always been the challenge about, I mean not like its been switched, lets talk to you about how to get your manager to get them to do what you want them to do, OK, now, lets talk about your own death, but kind of. You don't want to be bringing people into something that they are not ready for, that they're not interested and not able to, not willing to deal with, but you have to get somebody that is at least open to going beyond what's going on on the surface and so I think like even the very first coaching one class, James was not teaching people what to do to coach, what he's always been doing is asking who do you have to be and what questions do you have to be living in to be able to help other people in an effective way, so the question of what is a human being and do human beings change were questions, I mean what is a human being, this is how he would start out his coaching classes in 1987, that's, well, you could take the rest of your life to answer that question, but that is where he always started because that is what he's always working on is developing the coach into somebody who is turning their eyes inward which I think is a spiritual journey and examining themselves and learning about themselves and turning that knowledge back out to help other people with it.

MARK HARTNADY: When you say developing the coach, that's assuming, I would infer that the coach is the coachee?

[audio 01:00:00]

STACY FLAHERTY: Say that in a different way, I'm not quite sure.

MARK HARTNADY: My understanding of the purpose of coaching is to, especially in a business sense is to help really, to help people overcome problems, to develop leaders and so on, its not train or develop coaches, I would assume there are other coaches perhaps that new ventures west offers to train the trainer, but when you say, he always starts off by introducing the concept of what is a human being in the pursuit of developing the coach you said.

STACY FLAHERTY: Well, because all of these courses that we've talked about, coaching to excellence, associate coaching course, professional coaching course, these are all courses to develop coaches. So these are all course to develop coaches, so the people who are attending them are people who are wanting to become coaches themselves, so how he, OK, so how he

turns people into coaches is by having them address these fundamental spiritual questions and then once a person is a coach and how do they work with, so I understand your question is a little different, so how is spirituality in integral coaching, so if you have a coach and a coachee, to what degree, how is spirituality involved in that relationship, is that?

MARK HARTNADY: That is what I was getting at.

STACY FLAHERTY: OK, well, I think that just like in most coach training programs which is what I was speaking about originally with Newfield and all that, the kind of people they are training and the kind of coaching they are able to do afterwards is dependent on to what degree they address their own spirituality, but that said, once the coach is developed and is out in the world doing coaching with another individual, then, I think you can have coaching program that doesn't necessarily involve the coachees having to address their own spirituality, I don't think that is required content in every coaching program. I certainly think for coaching programs that, where I think that its important for the coach to understand the coachees relationship, well the coachees own relationship to their own spirituality, because when a coach is doing an integral assessment of their client, they want to understand, in order to do an effective coaching intervention, it helps, the deeper that they can understand their client and the more aspects that they can understand their client in, then the more effective the coaching intervention can be, so even if the coaching intervention has to do with I want to become a better manager, and there may be, for the coach to provide a coaching program that helps the client become a better manager...

MARK HARTNADY: They need to understand all the....

STACY FLAHERTY: The coach will want to understand the clients relationship. Mark I don't know how much of the curricular you have engaged in yourself already, maybe all, maybe none, but as a coach that you would train in integral coaching methodology, the coach would do, we call an integral assessment so they would do their best to understand the client in all the different dimensions of their life, so their semantic understanding, their relational life, their spiritual life, their cognitive life, their diet, the more you can learn about a client, including their internal awareness and their spiritual life as well, the deeper understanding you have, the cleaner and most effective coaching intervention can be designed that really takes that all into account and meets the client where they are and if you leave that out, I don't know, I suppose you could get lucky, if you leave out spirituality in coaching, you could get lucky and design something that might work, but to be really able to help a person in a profound way, you want to understand how they relate, I want to take two steps back and say that my own relationship to spirituality is, up until a couple of years ago I wouldn't have been comfortable saying that word, I'm just not somebody who ever felt that they knew what spirituality was, let alone what is my own spirituality cause I'm not somebody who was ever raised in a religion or studies Buddhism or reads mystical books, none of the above, so I didn't have a spiritual practice as I understood it to be and I was really uncomfortable with that word because I didn't really know what the word meant and recently I embarked on a very small exploration to find out what other people were talking about and I recognized that, at least what I've come to for me is that spirituality is somebody who believes in God or has a particular religious practice, that is probably a good reflection of their spirituality, I don't think that, I think their spirituality has to do with their understanding of their connection to the rest of the universe.

MARK HARTNADY: Just to clarify, by no means did I want to pick this out as something that I perceive as a big pillar that I don't understand, it's just that chronologically, in the session that was recorded in May this year, James is talking, he started off talking about Jesuit teachings went onto Roling, founding of Herminet, later in that session he started talking about a zen retreat that he went on and then that is where all the discussion about spirituality came in, so what I was trying to do here is, why that came later and how it kind of rolls up into the pillars of what made integral coaching into what it is.

STACY FLAHERTY: Interesting, yes it's a good, I did remember that it had come in later there, so this is helping me understand why we are having this part of the conversation. Let's see. It's true that James got really jolted back awake to addressing spirituality at the zen retreat although I don't remember, I have no idea what year that was, but I know that when it did happen, so maybe in fact, his, so he probably wasn't using the word spirituality way back when before this, although in my view it was always involved, but I think he became braver about using that word and about consciously bringing it in as a pillar after the zen retreat, certainly just from a personal view point I can tell you that his relationship to everything he was teaching became much warmer and more human once he got involved with zen.

MARK HARTNADY: He made mention of the fact that a lot of the teachings that he got from Fernando as you said were very assertive or almost aggressive and direct and after his retreat at this zen centre in San Francisco he came back with a totally different approach to coaching and he mentions love overcoming fear as a method of coaching whereas somehow it was different previously, so maybe it would be better suited if I left those questions to him directly, but I was trying to get a bit more out of that.

STACY FLAHERTY: OK.

MARK HARTNADY: Just going backwards a little bit, you mentioned someone called Julio, I didn't get his last name and I wasn't clear how he fitted into the picture.

STACY FLAHERTY: Oh, so his name is Julio Olalla, he is somebody who is also like Fernando, originally from Chile, a country in South America and he was around Fernando in the 80's at the same time James was and was going through the same kinds of trainings that James was, so they learnt to teach the action workshop together which was the speech act theory workshop that James was teaching first, Fernando first taught it for Werner and then he taught other people to teach it for him, for Herminet for that company and so Julio was trained at the same time so he and James became friends and have this similar, Julio didn't study with Fernando one on one like James did, but they spent a lot of time together, they had a relationship, they were both from Chile and James and Julio really liked each other.

MARK HARTNADY: Blabbed together in Spanish.

STACY FLAHERTY: I imagine they did.

STACY FLAHERTY: Julio started this, coincidentally started this school called the Newfield network which also offers coach certification and I don't remember, although you could look it up on the internet somewhere when Newfield started and I don't even remember being upset about it, even though they are a competitor in the sense that they have coach certification programs in the United States and you look at us or they look at some of the

other ones that there are and, so he is somebody who has taken a lot of what he has learnt from Fernando and added his own warmth and, Julio is a really good public speaker, I'm sure you'd find him on line doing lots of things, I mean he's got this charming Chilean accent as well as he's got a real, he just exudes love and warmth, he exudes relationship, he's so lovely to be around, so he's taken that and taken the speech act theory which can be pretty dry and brought those things together, so he teaches people with this effective work but with this real gooey loving expression, so Newfield, they do great work, so I don't know what else you want to know about him.

MARK HARTNADY: It's just a name, in my own research, I haven't come across. It may have been mentioned in the video.

STACY FLAHERTY: There is somebody else who has done a history of coaching, who made a diagram that I could probably find on my computer somewhere, she has all these people and all their influences and I don't know how accurate it was, it was probably her master's thesis or something.

[01:15:00]

MARK HARTNADY: That would be fantastic.

STACY FLAHERTY: I'll look and see if I can find it for you, I probably saved it somewhere, Lorelee will know where it is, I'm sure Julio is on there, of course she's American so its going to be US centred.

MARK HARTNADY: I'm doing a similar thing, just through the research I've gone through I've got something like 30 different authors who have all contributed in some or other way and part of the research I'm doing with you and with James is just piecing that all together and making sense of it.

STACY FLAHERTY: I'm just glancing down at this list under section 4 of authors and such and ...

MARK HARTNADY: I think this section is probably more appropriate just to talk with James about because what I wanted to do, as part of the thesis, I can't read all of these books, so what I really wanted to do, in 2 months, as much as I'd love to, is just to illicit and just make explicit the knowledge that James and others have from reading these things and link them together and find out what pieces have influenced the various concepts around coaching, so if you do have anything to add, please do.

STACY FLAHERTY: I just have spelling I can help with you, Wilber and Fischer and under T, I'm not absolutely positive, but I think Nicolle might have two "I"'s, I have an editorial I, but I know how to spell them.

MARK HARTNADY: That's good, thanks. All right, so I mean, maybe we can just skip to the next section then, if you can take me through your understanding, what I'm really looking for here is just where these concepts came from, so structure of interpretation, what has been the historical journey that these concepts have made and where have they come from, who are the thought leaders and how are they linked to the past basically.

STACY FLAHERTY: I'm going to be completely hopeless to you there, I don't know any of it, sorry.

MARK HARTNADY: That's mostly what I want to get from James, as I understand it, he's the one who knows it all and it's all in his head and this is the purpose of this thesis, to document it, because a lot of people ...

STACY FLAHERTY: You might need more time with him than you've asked for, he's the one that can tell you this. I might be able to help you with the next to the last one, how is IC(?) different to other coaching schools, but I don't think, you can also ask him that, he again will have a very specific answer I'm sure, but these other, some of them, I don't know the historical routes.

MARK HARTNADY: OK, that is fine, I'll leave it for him. What is, in your perception, the difference between integral coaching and other forms?

STACY FLAHERTY: Well, one of the things about other coaching methods, I don't think, so are there specific coaching methods that you have identified, marked?

MARK HARTNADY: If you go out into the world and you just Google coaching, all sorts of stuff comes up, there is leadership coaching, executive coaching and new ventures west is very specific about the language that is used and my perception is that there is a difference between integral coaching and other forms of coaching and there is a lot of stuff and influences that James has had, rolfing for example, where does rolfing come into coaching, if I was an executive, an organization and I was being coached using an integral coaching perspective, where does rolfing come into it for example?

STACY FLAHERTY: So I think what is different about integral coaching is kind of what I was talking about for a little bit with spirituality and with coach training which is that, let me see there are five different things I want to say and they are all on different topics, first of all, if people call us, our school or we are training people to be integral coaches and ask us that question, so what is the difference, is this executive coaching or is this life coaching, they ask things like that, is this leadership coaching, is this so and so coaching and even when you go on the integral coach federation website for instance and you are a person who wants to list yourself as a coach, you're supposed to put, what kind of a coach am I, am I an ADD coach, a life coach, a business coach, to me, I find most of those distinctions ludicrous, we're coaching, whether you're coaching executives or not, what makes executive coaching, because the client is an executive, therefore it's executive coaching, there is not a different methodology to me that you would use if you were coaching an executive, if you were coaching a leader, you are always coaching people, unless you're coaching dogs, you're coaching people and that is with us, what we are trying, when people ask us those questions we just, are you with this, are you with that, we're just saying, no, we teach coaching, we coach people and what background you as a coach bring to it and what your client is interested in that may define, is this life coaching because I'm talking about life issues or is this executive coaching, so my clients an executive or whatever, is this leadership coaching because their topic is they want to be a leader, none of those distinctions really are in the same, they are all apples and oranges. What we're saying with integral coaching, what defines integral coaching specifically is first of all, you have to remember the background is, the

coach has received the training that allows them to bring to bare, all their life experience in a very specific way and then I'll get in a second to answer your exact question about rolfing and the executive, which is, as an integral coach, you've done the background to get to know yourself in a very deep way, therefore you can bring, you can identify what you are bringing to the situation that is your stuff and how to, as a coach, how to not bring your stuff into a situation, so then you're as clear a vessel as you can be and that is one of the really important parts of integral coaching is that the coach hasn't, isn't taking a methodology that is outside themselves and applying it like a stick, they are not taking a series of questions that they've learnt and giving it to you, what integral coaching is, is someone is coming to you who has developed themselves in such a way that they have the capacity to attune to you and be present with you in a way and meet you in a way, so that's the first part of integral coaching, who gets to be an integral coach is someone that is developed in that way.

MARK HARTNADY: That is brilliant, that is really a beautiful description.

STACY FLAHERTY: I'm glad, sometimes I don't know where this stuff comes from, because I don't talk about this, no one asks me these questions, people ask me questions like how much can we spend for chairs.

MARK HARTNADY: Stacy, can I just pause you, sorry I meant to ask you this at the very beginning of, when I started, do you mind if I record this?

STACY FLAHERTY: No, I hope you are, I couldn't possibly repeat anything I said.

MARK HARTNADY: I was going to ask you right at the end, but its kind of my guilty conscience is now overwhelming me, I did start recording at the very beginning, but I didn't want to interrupt you because you were on a roll, thank you very much.

STACY FLAHERTY: So when you have a person who is in a condition to do integral coaching, then what they do with the client is two things which makes integral coaching. They do an integral assessment and they do an integral design. So an integral assessment means, what we were talking about a bit earlier is that they are present with the client, with the presence that they are able to bring because of the work they have done on themselves, they be with the client in such a way and ask questions, but they also observe and they listen to what is being said and they are listening to what is not being said. They are with the client and they don't shy away from areas, so they do an integral assessment by talking to the client about all aspects of their life, the executive comes and says, like, I want to get promoted or whatever, they don't say, OK, well, they don't limit themselves to asking business questions that are just around the topic, they want to know the client as a whole person, so the first thing they do is ask all those questions so that they can make an integral assessment which is an understanding and an evaluation really of where that person is in all those different domains and aspects of their life and once they've accomplished that, then they do an integral design which is they design a coaching program and the very fact of designing a coaching program is something that is, I think you need integral coaching, it may not be unique for much longer because it think many people at many schools are copying what we do which is fine, we love for people to be more effective at what they are doing, but for the longest time, the idea of even designing a coaching program was (?) in coaching which I can tell you why later, but first I'll tell you what it is, so we design a coaching program that prescribes in a way self observation exercises or reflections for people to do or exercises for people to do and gives

them a path forward, a direct essence, all aspects of their lives so when somebody wants to get promoted in business and they can't figure out why they're not getting promoted it may have to do with their diet, it may have to do with their quality of patience, it may have to do with them not getting enough exercise or it may have to do with the fact they're under too much stress because their kid is in the hospital or something, it may have nothing to do with the fact that they need to change their resume, so the coach taking their whole life into account and to what they listen to as the assessment and what they design as the program is what makes integral coaching, so backing up, the question about rolfing, an executive doesn't have to be right about rolfing coming into integral coaching unless, I mean, every integral coach is going to bring something different to it, so James knows about rolfing because he's been a rolfer and he can teach some of the basics of how a rolfer sees, because rolfing is not only a way of working on bodies, but it's a way of seeing what's going on in a person's body, so it's another assessment tool like (Myra's Briggs?) or any of the other billions of assessment tools there are, so what we encourage, backing up again to the who gets to be an integral coach, so what we're always encouraging when we're teaching coaching is not simply the methodology of what you do, it's who do you need to be to be a coach and who you need to be as somebody who is always asking questions, who's always exploring, always looking and trying out new things so you're exposing, whether or not you become a rolfer, you learn about how rolfing is and how rolfers see, you learn about what yoga is and how yoga is practiced, you learn about all these things such that you can, even if you can't do them all yourself or you haven't been all these things, you recognize enough so that when you see your client you can say, oh, there's a client who can benefit from rolfing, you can see it and therefore you can use it in what you prescribe as the intervention to what you say to your client, here's what I'm seeing in my observation and here's where I think it could be helpful to you and here's what I suggest you do about it. The coach is bringing as many of these different disciplines in as they can to their background as an observer and therefore as a practitioner. OK, that was one train of thought.

[01:30:00]

MARK HARTNADY: That is great, I understood that to a certain extent, but just hearing it from you provides a lot of clarity.

STACY FLAHERTY: Good. So in terms of how other coaching schools do it, I think, first of all, like I said, more and more people are learning from us, I hate to say that we're the best, to be arrogant about it, but I do think we are. I think that this way of coaching has always aspired to continue to grow and change and take things into account and always be on the leading edge of what's the best way we can help people, not settle on, OK, here's my 1,2,3 method, here's the 10 best questions to ask to be a coach, we never package it, it's always evolving.

MARK HARTNADY: A question on the coaching, when you design a program with your client, it starts off as I understood it, with a discussion, a kind of narrative that you have with the client to really understand the client, help them understand themselves, but are the two processes separate? Is there a time when the coach will go away, take that information and then use that information to develop a program?

STACY FLAHERTY: Yes.

MARK HARTNADY: Or does the coach work with the coachee and develop that program together with them.

STACY FLAHERTY: No. That said, it can be collaborative, there are a lot of coaching schools that are firmly entrenched in the collaborative as in they are committed to the idea that everything that you need to know is already inside you and part of my job as a coach is to work with you to bring that out together. So that said, if you take it in the extreme, you could argue the case that integral coaching, I used to work, prescribe before, but it has been used against us in the way that this is prescriptive and its not collaborative, I don't think the two are mutually exclusive, but that said, if we had to air one with the other, the point is, that the coach is bringing a new point of view and is bringing something that you don't know yourself or weren't able to bring to bear by yourself, not that, the fact is that when you have the discussion with the coach, when the coach talks to you about what he or she sees as your current narrative or after they've done the intake meeting where they've spent this time with you and had, if you're a really experienced coach like James' for instance, you are in taking and designing at the same time because the two, its just an organic process, but especially for beginning coaches, they would definitely do an in take session where they listen and learn as much as they can about the client and then say, OK, I'm going to think about what we talked about today and then I'm going to come back to you with something and then at the next session, OK, here's what I've been thinking about, and then they would, at that point talk about the design of the program, so initially the coach is going to hopefully bring something new to the client when they say, here's how I'm seeing how you see things right now, this is the narrative piece, what you described to me sounds like blah blah, whatever the metaphor is.

MARK HARTNADY: Like a mirror.

STACY FLAHERTY: It may introduce a new metaphor saying, how I see you or here's a way you could think about it or another way to look at it is, or whatever and then say something else, what happens when the coach suggests the new narrative and invites the client into the new narrative to try on the new narrative, it should feel like home, so when I say, that's what I'm talking about, even when its not collaborative in that the coach isn't sitting there working it out with the client, the coach is bringing this to the client, hopefully they are just shining a light onto something that is in fact true for the client, the client just couldn't see it, so it should just feel totally at home and collaborative in the sense that its part of them and that they, that its them, wholly them, not something that is laid on top of them, but that the coach is helping to reveal something they couldn't see, they peel back the blinders on something that is there and is essentially them, but they just couldn't see it.

MARK HARTNADY: On that narrative piece which is part of the flow of the coaching conversation as I understand it, there are various models that have been exposed to, the one is called the 10 ways and the other is the 6 streams. Could you explain those a little bit.

STACY FLAHERTY: Could I explain it a little bit?

MARK HARTNADY: The reason I ask is because when I started doing this research, most of the information I was getting was from James' book, coaching evoking excellence to others...

STACY FLAHERTY: And it doesn't have it in there.

MARK HARTNADY: Well it does, but it seems to have, there is a whole chapter on the flow of coaching but then I received material from Janine which seems to be new and updated and there is stuff there which is not in the book so the stuff that I got from her talks about these 10 ways, the 6 streams and I haven't been able to ascertain what that stuff means and where it comes from.

STACY FLAHERTY: OK, hold one second, my friend Christy is right here who knows more about this than I do. Christy, I forget the overview question of using the 10 ways and 6 streams is one...

FRIEND CHRISTY: The 10 ways are developmental so we're looking at stages of development, the 10 ways are developmental stages, the 6 streams are 6 streams of intelligence or competence is one way to look at it, so within the 10 ways you'll see the 6 streams change as you move down the 10 ways, so for example, immediate concerns is the first level on the 10 ways, so we have in the 6 streams cognitive emotion or relational somatic so the way that those streams show up and immediate concerns, immediate concerns is like for someone, the world is on fire, their cup is way overflowing, they sometimes talk really fast and they don't take in a breath and it's just like everything is happening to them and they're in a whirlwind and they don't know what to do about it, so how we would work with that person would be different to how we would work with somebody two levels down.

MARK HARTNADY: Makes sense.

FRIEND CHRISTY: So when you're doing an integral analysis, you identify where they are in the 10 ways and that informs you how you would work in the 10 ways, the streams really help you identify what is it that they're not paying attention to or what competence could they develop that would support them, given the outcomes that we're working on.

MARK HARTNADY: In terms of the development of the 10 ways, was that something that came from James or.

STACY FLAHERTY: Yes he made them up, based on all kinds of other models and things, it's a developmental model for coaching.

MARK HARTNADY: Best to ask him I guess.

STACY FLAHERTY: Yes.

MARK HARTNADY: Then in a coaching flow, you move on to what's called distinction, could you elaborate on that a little bit. Types of distinction, definition, metaphor, analogy, model, story, play back.

STACY FLAHERTY: Distinction just means, distinction is like a way of identifying something like drawing it out of the background into the foreground, so one way to talk about distinctions if you've, here in the US, I don't know about where you live Mark, we often hear stories about how Eskimo's have something like 35 different words for snow or something, so they have 35 snow distinctions that we don't even have, we see snow, it's snow, they don't snow, they see one of these 35 different things, I'm making up the number 35, so they have

distinctions that we don't have, so they can see something that we can't see because they have language for it and therefore they are able to see something and identify something by having language, seeing it first, come language first, however you want to see it, I'm not philosophically adept to have this conversation, but they can see it, they can talk about and the same with colours, some of us just see blue as blue, especially when you're a kid, you see blue and then as you get older you learn about turquoise and you learn about aqua and cornflower and all these different blues and you can't see cornflower blue unless someone has ever made that distinction for you, they've said, look, see this blue here and this blue here, this one here is cornflower, its got a little more purple in it, its got a little less yellow in it, it's a little darker, you learn what something is because someone has made a distinction for you. Distinction just means it's a linguistic act that shows something.

MARK HARTNADY: Through that process, from the narrative you are picking out and distilling what the crystallized issues are and putting a name on those which make them distinct I guess.

STACY FLAHERTY: In the old way we used to do, the process is I think a lot the same, in the original version of integral coaching, what would happen between integral assessment and integral design is that the coaching conversation that you would have with your client, what you did was, quote, made a distinction for them, so you talked to them, you said something that showed them a new possibility. So you said, you may have probably also been using narratives, we just weren't using that language at the time, you're looking at the world this way, what if you looked at the world this way, so we made a distinction for them that allowed them to see something new and talk about it in a new way and understand it in a new way and then you follow up with the design of the coaching program which the practice of which will allow them to attain competency relative to that new possibility, that new distinction and then more recently we've started talking about that conversation in a different way, so rather than it being, distinction had kind of a dry quality to it, I think we're still making distinctions and I think its still a useful term, its just now we've started talking about it like narratives which I think makes it easier for people to relate to because they can think in stories and in metaphors and they can think in phrase and analogies that shows something, I think its very much the same process, you still come to the client with a reflection of, here is what I see the current situation is, here is what I see is possible for you, but we're using the language of narrative rather than the language of making distinction and I don't think they are interchangeable, but they are very related.

MARK HARTNADY: It feels like its almost like going to the doctor and getting a diagnosis and then getting, going to the drugstore and purchasing the drugs, only you're making the drugs yourself.

STACY FLAHERTY: It is like that, which brings me back to the collaborative point, so even though the coach is initially making a diagnosis and initially offering a remedy for the client to try, that is the initial coaching program and the better you are as a coach, the stronger of an intake you've done, the better you are able to make a program at the beginning that is actually going to be solid and last throughout the 6 months or however long you are coaching the person, but that said, you are meeting with them regularly to have a conversation, well how is this treatment going for you, you tried this exercise, what are you seeing from that, what are you learning from that and how can we adjust that, so it is collaborative and you are constantly working with your client to make sure that what you've asked them to do is

resulting in what you wanted it to result in, so it is collaborative in that way, but its also the case that you are, with the training you've had as a coach and your ability to be able to be outside the situation and be a clear observer, that you are able and hopefully this is the point, you are able to continue to see things that your client can't see and to therefore be able to continue to help them adjust throughout the coaching program which is why its not just, OK, here is what I see, do it and you're done, cause obviously life happens and things change and the client needs support. They may go faster in their learning than you expected and you can take the program further than you thought, so it continues to need monitoring as you go on.

[audio 01:45:00]

MARK HARTNADY: And then one of those outcomes of coaching again is this self generating kind of approach in that there is no end to the coaching, once the coach leaves the objective is that the coachee continues to do the process themselves.

STACY FLAHERTY: Yes, they may not have to continue to do the specific process they did to get from the beginning of the program to the end of the program, but when a client comes and they have a presenting issue and they say, OK, here I am, I'm at point A and I want to get to point B, the integral coaching does not take it as their responsibility to get the client from point A to point B. They take it as their responsibility to see what the client would be able to do to get point C and point D and E, so they look for what kind of development of a quality or development of a competence would serve the client past point B, so they are independent of the coach after that, continue to grow and develop on their own.

MARK HARTNADY: Its almost like equipping the client with the skills necessary to be able to in the future detect what is holding them back so to speak.

STACY FLAHERTY: So in a case, for instance where a person comes to you and says I haven't been able to get this promotion that I really wanted and that's my issue and I really want this promotion and I need this promotion because I need more money for my family or whatever it is, they've got their aim on point B, that is where they are going is point B, like I said, an integral coach doesn't take it as their job to get the client the promotion, although of course they would have failed if they didn't get the promotion if that is what the client really wanted, but what they would do, I didn't really flash out this example, but I'm thinking an example where what really was in the way for the client wasn't their resume or their brilliance or their knowledge of the topic, but what was actually in the way for them could have ended up being, I'm just using a made up example, be their lack of patience that for some reason, they tended to jump in at meetings or interrupt people in a way that was rude and people, nobody knew how to say that to them and they just couldn't manage their own impulses to jump in, so by developing patience they could really calm themselves down in such a way that people, they could be appropriate in meetings etc and therefore get the promotion, but not only to get the promotion, but then they have an understanding about managing their own impatience and they can apply that to other situations and they can see how developing other skills would help them etc, it's a gift that keeps on giving.

MARK HARTNADY: Good way to explain it.

STACY FLAHERTY: That's what integral coaches are aiming for.

[Pleasantries and end of interview]

[01:52:17]

7.4. Appendix 3 – Transcript – Interview with Steven March, 26 October 2011

MARK HARTNADY: *[Introduces himself and asks Steve for his professional background/introduction]*

STEVE MARCH: So, my official university background is in computer science & mathematics.

MARK HARTNADY: That's interesting, okay.

STEVE MARCH: And as fate would have it, everything I shied away from in university is what I'm involved with now; philosophy, humanities, literature, poetry and spirituality so, it's quite a shift but in some strange way, I feel makes me more integral.

MARK HARTNADY: Brilliant. Okay. And you've always lived in the states?

STEVE MARCH: I've always lived in the states. Born on East coast in Pennsylvania, spent 13 years there then moved to mid-west for another 13 years, then westward to Arizona for a year, and then California where I've been the last 11 or 12 years.

MARK HARTNADY: *[Explains structure of interview & purpose]*

MARK HARTNADY: *[Refers to History of IC recording done in May & asks STEVE MARCH to elaborate on his exposure to the history starting with Jesuit influences]*

STEVE MARCH: I don't know if I can say much about that. I've clearly heard James speak about that on a number of occasions, but the way that gets expressed in the PCC, in the way that I have access to it, compared to other influences; it's one that isn't explicitly brought in as far as I can tell. Whenever that story is told it really seems to be the shaping of James Flaherty. It's clear that he was touched in some way by the exposure to the spiritual exercises of saint Ignatius – which is the core of the Jesuit teaching and I think that's retrospectively critical to having a profound impact in terms of understanding how practices function, and whatnot.

MARK HARTNADY: In the beginning of the history video, James talks about joining EST, the founding of Herment, his exposure to Erhard and Flores, Heidegger, Speech Acts. What has your experience been here? Can you tell me about your exposure to these influences?

STEVE MARCH: Oh yeah, absolutely, in fact, I've studied with Fernando [Flores]. When I went through the PCC, one of the things I got was that, as powerful a class as it is, that in a sense, James was not teaching what he does, but giving us an introduction - a place to start to build competency as an integral coach. So one of the projects I undertook thereafter, was to study more deeply the background of Integral coaching – that included studying Heidegger's

work, Speech Acts, Flores' work, very deeply, experiencing being Rolfed. At that time I had been studying Zen so I had that background.

MARK HARTNADY: Can you explain more about Roling?

STEVE MARCH: Yeah, the primary emphasis in Roling is structural alignment and integration. And so one of the core insights from Ida Rolf, who created it, was that the body is intended to be upright in the field of gravity, in a very natural way and there are ways in which our muscles can get frozen that prevent us from being aligned in the field of gravity. And so Roling is a technique of muscle manipulation in which you're working with what's called the Myofascia (layers of collagen around the muscle that help muscles hold their shape). Collagen has, like most materials, different states that it can be in. It can be in a gelatine-like state, or it can be in a solid state. In a solid-state the muscles are frozen in a particular tensional pattern and so the Rolfer, through the application of temperature and increases in temperature using friction, can shift the state of the collagen back into its gelatine-like form which allows the body to what its designed to do - which is to be aligned in the field of gravity.

00:10

STEVE MARCH: This I think is just one of the recognitions of the Somatic part of our work, in which we recognise the shape that a person is in, and has a lot to do with the way that they experience themselves and others in reality. So if someone for instance is in a collapsed body shape (e.g. chin more toward chest, shoulders rounded forward and their tail is tucked), they actually experience a world in which not much is possible. They experience a world in which they are withdrawn from contact with people.

[Interjection to clarify the length of courses offered in the US – PCC 12 months; PCE short course]

MARK HARTNADY: Is Roling a part of the curriculum of the PCC course? Are the theories and concepts of Somatics and Roling explained?

STEVE MARCH: One of the things that I teach in all of the PCC classes in the US, is the "Somatic Day". PCC over the last 7 or 8 years – one of the innovations we've had is that we've started to do Somatic work in the class itself. When I went through the PCC in 2001, that was not part of the curriculum. And so, part of what I do, we call "the day in the dojo" where we actually rent a local dojo, where we have plenty of room to spread out and move about and do Somatic exercises together. We introduce many of these concepts, but we don't do Roling per se.

MARK HARTNADY: Okay, and how is that "esoteric" approach to coaching received by hard executive types?

STEVE MARCH: Well, I think with something like Somatics, where people's understanding of it is very little to none, you do have to build in relevancy. And so in doing this we invite people to start taking different shapes with their bodies, and actually sensing how they sense themselves and experience themselves and other people and how they experience the world. And usually within about 5 minutes in taking different shapes, work with the body suddenly

becomes very relevant to people because they can feel in their own experience, the difference that it makes. So, it's true that many of the things that we speak about in the PCC, we can – language is another instance of this – spirituality, relationships, many of these things people don't initially understand the relationship that they have to human development. So I think one of the core experiences that we have to generate over and over in the PCC is for people, through their own experience, see the relevancy of it rather than through us putting forth some theory.

MARK HARTNADY: Thank you. Moving on from Roling and Somatics, could you please explain how you came to meet James and what led you to NVW?

STEVE MARCH: I first met James in 2000. I took the CTE class in 2000/2001, and then I took the full year PCC class in 2001 and completed in 2002. I had been studying Integral Theory, primarily through reading the works of Ken Wilbur, and the people that he references, and I had been doing that as part of a book study group in San Francisco. And, one of the folks who had joined that group was a coach, and I took him out to dinner out of curiosity, and he started talking about coaching and I'd never heard of that before. This was I think in 2000. His name is Amia Handelsman.

MARK HARTNADY: Can you explain the relationship between you and him?

STEVE MARCH: We had met only the book study group and so, he was a coach and consultant and I was working as a manager in a high-tech company, and when I met him, he was the guy who introduced me to coaching and I was very curious and interested and I asked if he could recommend a book, and he suggested James' book, *Coaching: Evoking Excellence in Others*, because James was doing Integral Coaching and the study group we were in was about Integral Theory. Then at some point, I checked out James' book, called the office, and scheduled a meeting with James. We then went out to lunch and had a great conversation for a couple of hours and at that time I was very much involved in Ken Wilbur's Integral Institute (invitation only, couple of hundred of us, spread through different branches). We had a couple of meetings per year. I was part of the psychology branch and the business branch.

STEVE MARCH: So, at that point I decided I wanted to take James' class. That was around 2000 when I made that decision. So my history from there is that I was in 2003 invited to be a "pod mentor" – which is a faculty position but it's kind of the most junior faculty position. So just to mentor students who were going through the class and I did that three times and then in 2006 James' invited me to enter the "leader in training" track to train to actually lead the PCC. And about a month or 2 later, he and Stacy also offered me a position as staff at NVW. And I was doing the "director of development" role or "enrolment role" so I was speaking to prospective students about the class, answering their questions, and in effect selling them on the class. I did that role for about 4 months because I had a simultaneous role, "vice president of leadership programmes" at Integral Leadership which was a subsidiary company of NVW.

00:20

MARK HARTNADY: And did that take priority?

STEVE MARCH: Well, what happened was, we started to get more business getting more Integral Leadership work and that started to take up more of my time. And so I transitioned

out of the “director of development” role for NVW and stopped being on staff at that point – I was only on staff for about 4 months. And I then I did the work as VP for Integral Leadership.

MARK HARTNADY: Can you tell me about your interactions with Fernando Flores?

STEVE MARCH: That was much after meeting James. I studied with Fernando in 2008. Once I graduated from the PCC I started my project to study in the roots of what James had studied because I felt that was the way to become as masterful as he was. So I started to read Fernando’s books. But finding information about his teachings if difficult; although he’s published several books, they only cover a fraction of his work, maybe 30-40% of his work is covered in his published work. And so I attended an advanced Integral Coaching class that James had led (probably 2004) because I met a man in that class named Chancey Bell. Bell was a former colleague of Flores – one of his most senior colleagues. James’ and Chancey had known each other from working with Fernando. So I spend a day with Chancey and was very impressed by him and found out that he lived very close to where I lived, and so about a month later I invited him for a coffee and told him that I wanted to learn from him – see the bigger story is that Fernando had stopped teaching in 1999/2000. Fernando has a business called business design associates, that was very successful but he closed it down because he had political ambitions. So Fernando, was previously the finance minister for Chile, when he was in his late twenties and he was ousted from that position during the coup in Chile. Fernando wanted to go back to Chile to run for president. Although he did not succeed in running for president he did succeed in becoming a senator in Chile. And so he had shut down all of his teaching and business work so the only way to learn his work was to apprentice people that had previously worked with him. So, I told Chancey that I wanted to learn from him and that I had a position in a high-tech company where we had plenty of challenges to work with – and I knew that Chancey’s work involved bringing Fernando’s work into the corporate world. So, we cooked up a consulting project with Chancey and his business colleague Guillermo Vexler, for about a year and a half in 2005/2006. So the rest of the story in terms of my relationship to Fernando; I maintained my relationship with both Chancey and Guillermo after studying both with them and in 2008 Guillermo invited me to work on a consulting project with him in Ireland working for a major bank. So I spend 3 months there to deploy a new process – and all of it was using Fernando’s work.

MARK HARTNADY: What kind of process?

STEVE MARCH: We were working with the primary customer-facing processes of the bank so it was looking mostly at the commercial loans process.

MARK HARTNADY: So they wanted to rework their process of engaging with new clients?

STEVE MARCH: Yes, because at that time when a business would put in a loan application it was taking them far longer than their competitors (6 weeks as opposed to 1 week). So the bank was losing business because their turn-around was too slow – the only reason the bank was still viable was that they were very conservative in terms of their portfolio and who they would lend money to so they were able to offer lower rates generally speaking. So, this was also during 2008 when the financial crisis ripple started to affect European banks also. So that was ultimately what ended the engagement with them as suddenly they had much bigger concerns to deal with than reengineering their processes (and they were pretty well paid consultants)

MARK HARTNADY: [Offers anecdotal familiarity and similar personal experience]

00:30

MARK HARTNADY: Okay, so after that?

STEVE MARCH: After that project, in 2009, just before Fernando's senatorial term was up (after 8 years) – he wanted to resume his teaching work. And so he was doing a kind of “new version” of his teaching. And I was invited to be one of the early guinea pigs in his new way of teaching. This was really a new innovation – it was his core work but the way he was teaching it was very different.

MARK HARTNADY: Can you explain that in more detail? How was it different?

STEVE MARCH: Well, one of the big problems with the way Fernando was teaching the kind of transformative things prior, was that it takes a lot of risk to try something in such a radically new way. And, when he was speaking with CEO's and people who have a lot vested in doing things in a certain way, it was proving to be too much risk for people to take. And so, Fernando had started playing World of Warcraft – which is a massively multi-player online game. What Fernando saw in this was the possibility in getting groups of people together using his practices but in ways where you could freely take risks to do things in a new way because the risk of failure is very little. You simply, don't finish your quest – no big deal. But the opportunity to actually work in a simulated environment where people have a shared goal where there are real emotions involved, where there are styles of relationship that do show up. Different people have different styles of collaborating, and you have to negotiate and work through all of that which Fernando's approaches do, and so he's been teaching these kinds of leadership and teamwork skills through World of Warcraft.

STEVE MARCH: The only downside that I could see to it was that you do have to spend a lot of time in the game itself, and there's a lot that you have to learn in order to do the practices that have nothing to do with the real world but just have to do with the mechanics of the game. So there's something very interesting happening there. You know, Fernando has always been a marvellous interpreter of the future and he's onto something. World of Warcraft may not be the perfect vehicle for this, but he is working with available technology to explore new ways of training and I think that's quite fascinating.

MARK HARTNADY: So that's how you came into contact with Flores. And then after that you were fully engaged with NVW?

STEVE MARCH: Yeah, I've been on the teacher-training track since 2006, so that's been continuous throughout this entire time. And I've continued this project – a seemingly never-ending project – to dive deeply into the background of integral coaching. So I spent, in 2005, a year studying deeply in Somatics, at something called the Strozzi institute.

MARK HARTNADY: Just to clarify, Somatics is the study of various body shapes and structures?

STEVE MARCH: Yeah, it's the study of the soma, and the soma is really the body as a living field of experience. The body in its wholeness. The way I look at it, is that you don't get emotions without a body, you don't get thoughts without a body, you don't get relationships without a body, you don't get spirituality without a body. That's just the way it is.

STEVE MARCH: So in 2006, when I started to be on the leader-in-training track, one of the gaps that I wanted to fill in NVW was that I saw the PCC as pointing to skills and competencies that coaches need to have and getting them stated in building those competencies but not really going as far as I thought was necessary. And that quest of mine continues to this day. But at that time what I was really focussed on was deepening the understanding of how to help people develop somatically.

STEVE MARCH: So, in your research, have you run across the 6-streams model?

MARK HARTNADY: Yes. The 6 stream of so called "intelligence", spiritual, emotional, cognitive, and so on.

STEVE MARCH: Yeah, we call them the 6 stream of competence rather than intelligence although you can certainly look at them that way. Our focus is on building know-how as opposed to knowledge. So we language things in terms of competency.

STEVE MARCH: So, I had gone to the Strozzi Institute, founded by Richard Strozzi-Heckler, to learn more deeply about Somatics and I went there specifically because the founder of that institute had studied with Fernando Flores and so I assumed that there was some shared philosophical background between James' approach, Fernando's approach and Richard Strozzi's approach.

MARK HARTNADY: Can you explain the mission of the Strozzi Institute?

STEVE MARCH: Their mission is to teach courses in embodied leadership. Basically, they help people develop the "body" of a leader. If you take a look at the broader self-development market, the decade of the nineties was the decade when "emotional intelligence" became popular and people sought out *learning emotional intelligence* in the business world in particular. Now, there is such a thing called *somatic intelligence* as well but it's not as widely recognised as widely as emotional intelligence. So the work of Strozzi-Heckler has been to bring somatic intelligence more into the mainstream.

[Interjection to clarify permission to record session]

00:40

STEVE MARCH: And what I noticed is that although the Strozzi Institute will certify people as Somatic coaches based upon the standard I'd been exposed to at NVW, I didn't think they were actually teaching coaching. When I came the leader-in-training track at NVW what I wanted to do was to create a class that would teach somatic coaching, that is, teach in the somatic stream because in the PCC we say that you have to work in the somatic stream but at least when I went through the PCC we didn't really talk about how to do that. In some regards, that's true even today that we don't elaborate and articulate a full methodology for each of the streams separately. Instead we articulate an overarching and generic methodology that includes work in all of the streams. But I wanted to zero-in on the somatic stream and

subsequently I've zeroed in on other streams as well and so I created a whole body of work on how to coach somatically. And it's really from that work that the current day in PCC has been derived from.

MARK HARTNADY: When you as a coach training other coaches, does everyone in NVW operate according to the same model or do you have slight variations on a theme?

STEVE MARCH: The answer to that is quite complex in that it's both yes and no. One of the elements of Integral coaching as we teach it is that it's critical that each coach teach in a voice that is authentically their own. But at the same time, in that sense, the way we all teach is different and every coach coaches differently – it's an expression of the individual. But at the same time there is something that's common across all of us what we could call "the integral methodology". For instance, the somatic day that I teach in the USA, is not taught in South Africa, simply because I don't teach there. So there are some slight differences in the course [depending on who is running it] although broadly speaking it's the same course. But even when I teach the PCC myself, every class is both the same and different. There are certain exercises and structures that don't change but so much of the class is improvised out of the conversation that's alive between students and myself. So I might bring in different exercises depending on what's needed as the class is unfolding.

MARK HARTNADY: And I suppose who is in it [the class]?

STEVE MARCH: Yeah, this is one of the things that makes teaching in this way hard to learn is that it's not just a matter of delivering content; it's a matter of creating a class from who you are being.

MARK HARTNADY: And designing a programme according to who is in it and their experience, I'd guess.

STEVE MARCH: Exactly. And in doing that, in an improvisational way, on the fly.

MARK HARTNADY: And to do that, I guess would require a good understanding of what it means to be human.

STEVE MARCH: Of course, and that is one of the core questions that we keep asking and returning to again, and again, and again. And out of our engagement with that question, you could say the entire body of integral coaching has emerged.

MARK HARTNADY: That's great. So that's pretty much your history and exposure and where you've come from. I wanted to investigate a bit more the various courses IC courses offered and their origins. Can you take me through the central pillars of what constitutes the PCC and how it differs to CTE?

STEVE MARCH: The CTE puts forth the core of our methodology, and we speak in the CTE class about "why coaching" compared to other available approaches such as "problem-solving" or "advice-giving" approach or a "teaching" or "therapeutic" approach, etc. So we make an attempt to distinguish coaching uniquely and motivate that, and then we put forth a methodology for doing it and give people an opportunity for doing that and trying their own hand at it. Mostly what this does is it helps feel whether they resonate with what we're doing

or not. Some people are turn-on by what we do, the methodology, etc, while others are not. And we're fine with that. The other thing that this does is that it gives people an experience with the kind of skill they are walking in the door with as a coach that they can leverage and what skills they may have to develop. And this comes out of trying their hand at it.

MARK HARTNADY: During the CTE course, do you have workshops where you will facilitate the students practising coaching?

STEVE MARCH: We have exercise in the CTE class. There are 2 different exercises, 2 each day so that they have a firsthand experience about what we are talking about. And what most people realise is that the competencies and skills to do this is what they lack. They are not stepping in as competent coaches stepping in. So the CTE really motivates people that resonate with the method to take the yearlong PCC.

STEVE MARCH: So that's really the promise of the PCC, as we like to say "develop the body of a coach." And we say it that way firstly because it's provocative, it's odd, it's strange. People don't expect us to say it in that way and that creates a certain kind of listening. People "wake up" in a sense. They pay more attention. And really there are several central pillars or core threads that run throughout the year. One of them is self-development. "Learning coaching by being a client" would be another way of saying this. So throughout the year all of the students are coached and we do this to help them develop as human beings and to "build the body of a coach".

00:50

STEVE MARCH: That's one thread. A secondary thread is teaching a core methodology so there's a methodological thread that runs through the whole class.

MARK HARTNADY: Can we hang with that idea for a moment? So this methodology, the Centre for Coaching here in Cape Town also uses the integral method and the methodology that's used here is this kind of coaching conversational flow that's used in a conversation which starts off by the coach developing a relationship with the client and getting to know them and establishing a presence, understanding the client and how they perceive the world and using that, what James calls that structure of interpretation to understand how they model their life through their various domains of competence. Once that relationship has been established, which I think that's most of the time that's spent with the client, a narrative is introduced by the client which explains their problem or whatever they're trying to achieve in their life. The coach listens to that in a hermeneutic way and invites the client to a new narrative, after which there is a distinction of what those potential roadblocks are. The coach will then go away and design a coaching programme based on the listening that the coach has done and the experience that they have and the experience of the coach with regards to those six streams that you talked about. Is that more or less the methodology that you use? I'm talking as someone who doesn't understand this very well and I'm using high-level descriptions – is that the model that you use?

STEVE MARCH: There are a couple of things that I would offer slight adjustments to, but more or less that this methodology. The methodology is composed of a couple core elements. One is the overall flow of coaching; there's a trajectory that we're working with clients on through the duration of the time we spend with them. That's what I mean by the overall flow

of coaching. Within that overall flow there is a second flow called “the flow of a coaching conversation”. That’s the trajectory that one singular conversation has. We essentially have a couple versions of that because the kind of coaching conversations one has in the [beginning](#) when working with someone is slightly different than the trajectory of conversations in the middle and at the end.

MARK HARTNADY: Could you explain? As I understand the flow of conversations, examples of that would be the conversation for the relationship, the conversation for possibility, the conversation for action. Is that what you're talking about?

STEVE MARCH: Those distinctions can be overlaid on top of these flows. In fact, those distinctions really stem from the work of Fernando Flores and this is a way that Fernando speaks about different kinds of conversations. Conversations is a really and big and central concept for Fernando. He sees so much of what gets created and what gets in the way as stemming from conversations. He has a lot of distinctions about different kinds of conversations and the structures of those conversations.

MARK HARTNADY: What’s the thinking there? What’s the kind of reason for conversations helping or conversely becoming the cause of a problem?

STEVE MARCH: In terms of the background where Fernando is coming from, which we also share, there is a recognition that there’s a lot of meaning that’s made in our world that’s a social construction.

MARK HARTNADY: From language or whatever?

STEVE MARCH: From language and from talking with each other. We make sense of our world, we open new possibilities, and we diagnose problems. This is where the Speech Act theory comes into play. Fernando’s understanding is derived in part from Heidegger’s work with language and that, mixed with Austen and Searle’s work with speech act.

MARK HARTNADY: The more I get into this thesis the more I keep coming back to sounding these roots of coaching. There’s a lot of literature that James talks about in that video that he’s read that he and you have been exposed to and that a lot of people have worked with, but the real base always come back to Flores and phenomenology and thermanology and Heidegger and speech acts, John Searle.

STEVE MARCH: The two core roots, broadly speaking, of our work is language and thermatics. One could argue that there are some others in that core area. Others that you could put in there would be spirituality and relationship. If we look at what are the deepest roots in terms of what’s been around the longest in our tradition I think it’s been language in the body. That goes back to Fernando. Fernando is more heavily weighted towards language than he is to the body but he does recognise the need to work with the body. He just hasn't articulated a way of doing that as fully as we have or as Richard Strozzi-Heckler has. That’s one way I understand the evolution of this body of work, particularly with the inclusion of integral theory, is that we keep asking the question what is a human being and we keep noticing that there are facets of the human condition that has been left out of our answer to that. What we start to notice is the limitation that that presents when we leave out the body or we leave out relationships or we leave out spirituality. We start to say how can we integrate

that and what new possibilities does that open up when we do that. How can we work in a more effective way as coaches? That has been the primary impulse that has driven the development of integral coaching over the years.

MARK HARTNADY: It's coming back to that question.

STEVE MARCH: It keeps coming back to that question and discovering is there a major facet that we've left out. There's another fact here which is that one can enumerate many, many facets of the human condition, hundreds of facets, but to create methodology that would ask coaches to look at their clients, a hundred different directions in one. There's a pragmatic constraint that we're always working with here. How can we simultaneously work with more of the whole person but do so in a way that has economy and practicality to it? I think that's part of the elegance of integral design that we've arrived with this methodology that looks at the four human domains, the six streams of competence and the ten ways of being.

1:00:00

We look at that and say that is a minimal set of things that allows us to work with and see enough of our clients so that we have a powerful way of addressing any situation with them but is not so overwhelming for the coach to get a grip on.

MARK HARTNADY: I want to come back to that. I'll just make a note of it now because we had a structure going here. We talked about the pillars of what constitutes the PCC programme and started off talking about self-development. You then started talking about the methodology and you were making the distinction between the entire flow of coaching with regard to a kind of trajectory, getting the client to where they want to be versus a flow of conversations. You were saying that stems from the work that Flores did in looking at different kinds of conversations and how we derive meaning from that.

STEVE MARCH: The distinctions in particular of conversations for relationship possibility and action is a Flores and his associates' thing. Naturally we see that the primary activity that coaches are doing is they're having conversations with clients. In the [beginning](#) of working with a client one has to build a relationship because before you can really start to make conversational moves that shift the world of the client you have to have some relationship with them.

MARK HARTNADY: And trust.

STEVE MARCH: And trust. That's clearly an aspect of the relationship that has to be there. James in his book has articulated the aim of this part of the methodology is to build mutual trust and respect and freedom of expression. He sees those three elements as vitally important of a real coaching conversation is going to happen. The one thing that I would adjust in the way that you spoke about it earlier was that – this is a tricky thing, that it looks in the way that these flows are presented that they are very linear. First you build a relationship, then you do the next step and then the following step. It's true that in a way that's a general tendency but the truth is also that all of these steps are happening simultaneously. You start to build a relationship and that never ends. You're always deepening the trust, you're always deepening your understanding of a person's history. That's always happening. You're always assessing and observing the client. You're always meeting the client freshly every time you meet with

him so it's not a matter of just making an assessment at the [beginning](#) and then basing your entire design on that assessment. That does happen but that assessment has to continually be revisited every time you meet with the client, as does the design have to be revisited. This is another aspect of the methodology in which we come up against the both-ends scenario. It's both a linear progression through these different stages and simultaneously these stages are happening all at the same time.

MARK HARTNADY: Like a Gantt chart that the relationship continues forever.

STEVE MARCH: I think a Gantt chart is a bit more linear than this but it's like – perhaps a Gantt chart is a task view but there's simultaneously a process that's also unfolding. A Gantt chart represents the task view but not the process view. The process view has lots of looping around, going forward and backwards. It's a little bit like you have to simultaneously understand there are [indistinct](#) to be accomplished. That's not the whole picture. There's a process of deepening relationship, of ongoing assessment, of ongoing design, of ongoing spotting and resolving of breakdowns. The coaching conversation evolves and unfolds every time and gets more specific and fine-tuned as you learn more about the client, both through spending time with them and seeing what they do with what you offer.

MARK HARTNADY: Do you have case studies, if you have a potential client that's not familiar with coaching?

STEVE MARCH: We have case studies. All students are required to do case studies and to submit three for certification. We don't have case studies that we circulate in the public as a way for people to get a sense of this. It's an interesting idea, perhaps we should.

MARK HARTNADY: It's interesting because a lot of the stuff that you talk about I take my mind back to the course that I did, my MBA with Janine. A lot of the time, unless you've had that experience, when you say things like “continuous assessment” it's hard to picture what that means and what that looks like.

STEVE MARCH: It's very true and I think it's very hard, if not impossible to get a sense of what integral coaching is outside of actually experiencing it. We can talk, I'm happy to talk as much as we need to. I'll try to describe this to you for your purpose and there will always be something lacking.

MARK HARTNADY: The important thing is to get the key ideas and influences. We talked about the flow of coaching [conversations], that methodology. Is there anything else that you want to add to what constitutes that?

STEVE MARCH: In addition to the overall flow and the flow of the coaching conversation there's also the models that we use to assess our clients. That's part of the methodology. There we use the four human domains, the six streams of competence and the ten ways of being. There's room in the methodology for using other assessment instruments. For instance, we introduce students to the Enneagram in session one, which is another personality typology.

MARK HARTNADY: I'm familiar with it. I'm a seven, I think.

STEVE MARCH: We introduce people to that but we don't consider the class, we don't really teach it in a sense that we don't bill the class as an Enneagram class.

MARK HARTNADY: But you expose the theory behind it and get people thinking about it.

STEVE MARCH: Some integral coaches include the Enneagram at this point or they include other assessments that they may know about. Some coaches will use Meyer-Briggs or the Burkman or various other instruments that are available. We don't place any limits on that but we say that as a minimum we'll have to use what we call the four, the six and the ten.

MARK HARTNADY: Do you mind if we spend a bit of time on this? There's two things I want to know. The first is how did it come to be that it was these three models that emerged? Secondly, how do you do an assessment on someone's ten ways or six streams?

STEVE MARCH: I don't know the full history of how these emerged. That's a good thing to speak to James. I have some speculations that, where James has been influenced by Ken Wilbur's work, in the mid to late 90s Wilbur was writing a lot about his particular model of integral theory which he has a shorthand way of naming it which he calls, "all quadrants, all levels".

MARK HARTNADY: AQAL?

STEVE MARCH: AQAL. Wilbur's basic definition of integral is that you have to address all quadrants, all levels, all lines and all states. That was his definition.

MARK HARTNADY: If not, you're not being a full person or...?

STEVE MARCH: If not, there's an aspect of reality that you're leaving out in respect of the human condition that could limit you. I think Wilbur's definition of integral has evolved beyond that but at the time that was his definition.

MARK HARTNADY: I was reading as part of my literary review, he wrote a book called *Integral Psychology* and he talks about spiral dynamics and all sorts of interesting stuff. In essence, James took that model and adapted it for this flow of coaching?

01:10:00

STEVE MARCH: Yes. The four human domains we used to call the four quadrants and they are basically Wilbur's four quadrants although we draw them in a different orientation than Wilbur does. Wilbur's concern is slightly different than our concern. In his four quadrants he includes everything in the universe so he has atoms and galaxies and things like that. Atoms and galaxies are interesting in terms of the four quadrants of reality but they have no bearing in any practical sense on the four quadrants of a human being. We don't care about those kinds of things. We draw our four domains model in a way where it only has things that are relevant to human beings. We draw it because we're putting the model to a particular use that Wilbur was not putting his model to when he developed his. We're inspired but slightly different.

MARK HARTNADY: I guess he would argue differently - or maybe not.

STEVE MARCH: He may. I think he may argue slightly differently, particularly if he takes his current definition of integral and looks at our work. He might say this is not as full integral as it could be. What Ken keeps doing and I think this is the inevitable direction of development of what integral is that he keeps noticing more distinctions he can make to name things that are left out, that can be included. Wilbur now, for instance, understands that not only are there four quadrants but in each quadrant there are two different perspectives on the quadrants; inside and a perspective from outside. He now has this model of eight zones that he talks about as the definition of integral. It's interesting work but, again, I think our question is, if we named those zones and started to ask coaches to get to know their clients from within all eight zones does that create an undue burden on the coach? Does that in a sense cross the barrier of autonomy and practicality? Does it fail the test of pragmatism? Our current sense is yes, it does.

MARK HARTNADY: Pragmatism is quite a big thing. I was just reading some of the papers that Janine has published; she talks about the whole theory of pragmatism and it's one of the roots of coaching.

STEVE MARCH: This is perhaps equally as important as the continental philosophies of Heidegger and Gadamer that we draw on as the contribution of the American pragmatists. Pragmatism is ideally suited for the task of coaching because it cuts through a lot of the arguments about what is so, what is true.

MARK HARTNADY: The whole ontological argument about what's true can go on forever. You have to stop at some point and that's really the answer, whatever works is where you stop.

STEVE MARCH: That's the kind of touchstone as we work with coaching clients. We made discoveries that what works for one client doesn't work for another client. I think this is one of the things that prevents our methodology from becoming a dogma.

Part B

00:00

MARK HARTNADY: [Introductory remarks] In the previous interview you mentioned a journey or quest that you've undertaken yourself to study deeply the roots and the background of integral coaching in the pursuit of becoming masterful. I'd imagine a lot of that involved reading a lot of the works or the literature that James has read. What I wanted to focus on mostly in this [interview] is just to go through what I've identified as a couple of key authors that have contributed to the theory of integral coaching and maybe just hear what you have to say about them. We don't have to spend much time on the ones we've covered, like Heidegger, but if there's anything that you have to add it would be very useful. I'll just go through a couple. Have you read Heidegger's magnum opus, *Being and Time*?

STEVE MARCH: I haven't read the whole thing beginning to end but I've read within it in various sections.

MARK HARTNADY: What did you take out of it the most in your learning?

STEVE MARCH: It's a small question for a very deep book.

MARK HARTNADY: What did you feel were the kind of main teaching from that work specifically which influenced the integral method of coaching?

STEVE MARCH: There's so much of Heidegger's work overall, both his early work which is *Being and Time* and before and his later work. If you study Heidegger you might discover that scholars divide his work into different periods because his work underwent [indistinct] evolutions. There's often what's referred to as the turn, in which Heidegger started to pay a lot more attention to language. The later Heidegger's attention to language is something that has influenced integral coaching a lot. Early Heidegger's work, his *Being and Time*, frankly, a lot of which is really up to there is trying to get to the question what is a human being and to do so in a way that stays close to our actual experience of being as human as possible. If I say something like "a human being is homo sapiens, blah, blah" it's true in a way but it doesn't really add anything to our understanding of what it's like to live as a human. One of the big things that Heidegger was up to and which will probably never be repeated again in the history of philosophy is that he was active in the very beginning of the project of philosophy back to the pre-Socratics in Greek philosophy. He basically said the whole project that started on the wrong foot, at the very beginning the people would ask what is nature. They would look at the world around them and say what is this, what is the nature of this. They started to speculate and come up with ways of talking about atoms, etcetera. Their second question was to look at themselves, to say therefore what is the nature of us? The answer to that question on the basis of the language they had developed answered the first question. We became material beings. Heidegger said that philosophy has to be started on the other foot. The first thing you have to do is to ask the question what is the nature of the being for which being is a concern? That's the way Heidegger framed it. What is the nature of being of the one who was asking the question is another way to say it. Heidegger restarted the whole project of philosophy on the other foot and worked from there to review everything. It's a truly monumental feat that people could do that. So much of his philosophy is aimed in *Being and Time* at answering that question, what is the being of the being through which being is a concern. It sounds like a mouthful but if you work it out he's saying what a human being is. I think we talked about the centrality of that question in our last talk.

MARK HARTNADY: You were mentioning that there were different works that he did that had various impacts. You used a word there for a period called *turk*, I think you said?

STEVE MARCH: It's called the turn. After the turn Heidegger wrote things like *On the Way to Language*. He wrote *Poetry, Language and Thought*. Those books definitely have influenced integral coaching in its interpretation of language.

MARK HARTNADY: Who came first, John Searle or Heidegger? You were talking about a book that Heidegger wrote, called *On the Way to Language*. You mentioned that after he wrote *Being and Time* he was influenced quite a lot by language. I know that John Searle was kind of the father of Speech Acts. Did John Searle influence Heidegger or *vice versa*?

STEVE MARCH: Searle historically came after Heidegger. These guys are in different branches of philosophy, probably there isn't much influence between them. I think Searle's career started at Cambridge. Although he's American his career started at Cambridge when he studied under John Austin. Austin's work and Searle's work definitely had an influence

on integral coaching but they come out of a branch of philosophy called analytic philosophy which is very popular in the UK. Heidegger comes out of a different school called continental philosophy.

00:10

MARK HARTNADY: You were saying Searle is more of the analytical philosophy school whereas Heidegger is...

STEVE MARCH: Heidegger is continental. In philosophical circles for a long time they were considered largely incompatible and very much opposed. One over-simplified characterisation that I once read about the comparison between the two is that the analytic philosophers are much more like lawyers in piecing together arguments in a very logical way. The continental philosophers are much more like journalists where they try to write about what life is like, from actually living. Generally speaking, in integral coaching, continental philosophy is way more interesting and useful perhaps because we're not so much interested in the details of logical argument. We're more interested in what it's like to live life and how to live a more fulfilling life. The big innovation that Flores created and I've heard him tell the story before – he says that the way he tells it is as a Chilean he didn't know any better. He didn't know that these two branches of philosophy were considered incompatible. What he did he just took something from analytic philosophy, which was Speech Act theory and mixed it with Heidegger and put it together in a way that works. That was a big innovation for him to take those things and say that you can actually integrate them.

MARK HARTNADY: It's quite phenomenal about how you can read about this stuff and still not draw that conclusion. I didn't realise there was a difference until two minutes ago. Would you say Flores is the first person to do that, to integrate these competing branches of philosophy?

STEVE MARCH: I'm not a [indistinct] philosopher to say if he was really the first person or not but I do think that even to this day, what, 30 years after, or 20 years after Flores' original work you still don't find these two branches of philosophy integrated that often. I don't know if he was the first but he was certainly a pioneer in this. You are beginning to see, from what I can tell, but again I'm not a philosopher so I don't track everything that's happening in that field but I do, [indistinct] foundations of [indistinct] integral coaching I do read regularly and you are beginning to see in certain areas these two branches of philosophy coming closer together. I haven't yet seen a free integration of the two of them that shows up in Flores' work. The key integration here is that from Searle's perspective he sees that there are actors or people who are speaking, or what he calls utterances, back and forth to each other in a way that [indistinct] them to construct reality, to make being and to co-ordinate action. From an analytic philosopher's perspective that's an important thing to understand because you have to have that kind of rigour in your arguments. What Flores noticed was from the Heideggerean perspective that each of those speeches have an ontology. They have a certain understanding of being, a certain understanding of who they are, of who the person speaking to them is. In effect that's the integration between the two, it's recognised that within a situation of two people speaking to each other, as we are now, there is both utterances between the two, let's say the interpreting [indistinct] but from the perspective of Speech Act theory, but there's also your ontology or frame of reference, your

structure of interpretation and my structure of interpretation. Both of those are employed at the same time. It's was a very integral movement that Flores made which was to say that each camp had only part of the truth and that by combining both of those together he was able to recognise more of the truth in every moment and then make a more powerful interpretation and therefore respond in a more powerful [indistinct] way to break down as things that aren't working. That's a very integral kind of move to make, as if to say how can we embrace an even greater truth. Flores didn't have the integral models at that point because he was working in the late 70s, early 80s and they hadn't been created then. He was working out that level of consciousness. He had developed himself in a [indistinct] world in a more integral way.

MARK HARTNADY: When you say he didn't at that stage have an integral model to work with are you referring to kind of Ken Wilbur integral model?

STEVE MARCH: Correct. What Flores did was an integrating movement. It was an integral movement but he also left things out. He left out the body, for instance, and that had [indistinct] There's a lineage of this. You can see that each developmental step in the lineage, what happens is, a pioneer finds a way to include and embrace more of what's true, what we're in the middle of. That creates a kind of revolution in the [indistinct]

MARK HARTNADY: Regarding Speech Acts theory developed by Searle, can you give me a practical example of how that's used in coaching?

STEVE MARCH: There are many different ways that's used both in fundamental understanding that what coaches deal with their clients usually have conversations. In those conversations they speak, they utter words and those words shift what's possible and shift the future, the process. That's one area and I could be more specific with an example [indistinct] The other area is that we often teach clients these distinctions, the distinction of the Speech Act, so that they can begin to see, when they're making requests, they're making comments, they're making declarations, so that they can be more skilful in having conversations with other people. They'll be more skilful in co-ordinating action with other people. So we use it ourselves and we also build the skill of our clients. The one thing I'm curious about, the lineage of Speech Acts theory really begins with the book *How to do Things with Words* by John Austin at Cambridge. It's a very small volume. That is advanced by Searle's *Speech Act Theory* book. Searle used the Speech Acts theory in a number of his books but the book called *Speech Act Theory* is the primary work. Searle's formulation of it is very cumbersome. He talks about permissives [?] and expressives [?] and various different things and so one of the things that Flores also did was he simplified it and made it more powerful. With Flores' formulation, which is the one that we use, there are several different acts, requests, offers, promises, assessment, assertions and declarations. That's a much more usable set than the language that Searle came up with.

00:20

MARK HARTNADY: Searle tried to break down at least the English language and codified and tried to understand how we get meaning out of language from codifying it early.

STEVE MARCH: In particular how we co-ordinate action.

MARK HARTNADY: Intentionality.

STEVE MARCH: Yes, intentionality was a big one. I think the biggest distinction and the most important distinction that came from Searle and Austin and was also picked up Wittgenstein [?] at a point is that language isn't only descriptive, it's also "performative". Prior to these guys doing their work most people assumed that language was descriptive. We think that what we do, there's a reality that exists and language would describe that reality. It's true, we can say, pass me the book that's to your right. We can do things like describing the reality but when you say, pass me the book, we're not describing anything that exists. We're instead making a request. Language has the capacity for action, to say the language is performative. Language itself is an action and it doesn't describe anything. When we set up the appointment to have this call right now and I said I can meet on this day at this time in the morning I wasn't describing anything that exists, I was making an offer. When you said, that will work in my calendar, let's do it, you weren't describing anything that exists. You were agreeing to my offer which is called making a promise. What we were doing, performative language, was we were saying something, we were inventing a certain future that we would be working together to create. That's basically what happens. That's the big insight of Speech Acts theory into language as performative. That's what we use as coaches where I'm having a conversation with a client, what I want to help the client do is to reinvent their future so that the client sees some new possibility.

MARK HARTNADY: Would you, in assessing a client, with language in the back of your mind, take notes consistently of how they speak, what language they use, what pronouns they use, what sentence structures they use to get an idea of how open they are to new possibilities or limited in scope to what they naturally are able to envisage?

STEVE MARCH: Exactly. As I'm working with clients and listening to the distinctions they use, meaning the kind of language they use to refer to themselves, the kind of language they use to refer to others, the kind of language they use to speak about the future, all of those things are very important because those are all interpretations that I may need to work with as I work with them

Part C

00:00

MARK HARTNADY: You were talking about noticing how clients use language to distinguish between themselves, others, possibilities, future moments in time and then we got cut off.

STEVE MARCH: I'm listening to their use of language in many different ways and part of what I'm offering them is new language, new distinctions, inviting them to reconsider or consider a new narrative, a new way of understanding themselves, others, action, their world. That's all Speech Acts theory. We're working with, there is the insight that language is performative and this is where Speech Acts theory and Heidegger's work come together, when we see language as performative, which is an insight from Speech Acts theory, and we couple that with Heidegger's observation that the way we are, our way of being is produced by our doing. We "do" ourselves into our way of being. To integrate these two insights together we perform action with language and that "does" us into a new way of being. The

language is awkward but that is the core of coaching, right there, at least the connection between the language and the way of being. What we've added into that is the whole practice piece to reinforce that.

MARK HARTNADY: Logically when you break it down it does make sense. The next big names are Maturana and Varela. They wrote a lot of about autopoiesis, biology. I think Varela was a biologist. Self-referentiality and doing away with the separation between what's out there and what's inside of me. Have you read any of their works and has that influenced your work?

STEVE MARCH: I studied with Maturana as well. For a very brief time I attended a five-day workshop with him.

MARK HARTNADY: When was that?

STEVE MARCH: I would say in 2007. Of course, Varela passed away in, I think, 2001. Their work, one way of speaking about Maturana and Varela's work, it's Heidegger reinvented from the perspective of biology. When you read Heidegger you go, I get this from the philosophical perspective and then you read Maturana and they're speaking about things like the nature of perception, the nature of cognition, how does perception and cognition arise biologically. That's one of their core questions. The other core question of them is what is life? What actually is it, which is a devilishly simple question but it turns out really difficult to answer. This is what you find when you read Maturana and Varela's work, is that, if you know Heidegger's work it sounds like they're speaking in this way of our being is created by our way of doing. The really big concepts in their work, human beings are structurally determined systems and basically, from a perceptual standpoint we're closed systems, not open systems as many people think. What structurally determined means – when I was working with Maturana this is the way he described it. He said, imagine you have an old-style tape recorder and on the front of it it has several buttons, the record button, the play button, the fast-forward and the rewind. If you stand in front of this device and you say, I would like to make a recording, please start recording now, the device won't do anything because you're not using its interface, you're not interacting with it according to its structure because it's a structurally determined thing. In order for you to interact with this successfully you have to match its structure. You have to reach out and press the record button. That's the way it works. He said human beings are structurally determined, too. Our structure determines the kind of world that we see and the kind of interactions that are possible in our world.

MARK HARTNADY: Surely there isn't anything in the universe which is not structurally determined?

STEVE MARCH: That's right. The way it works is that we as structurally determined systems and other beings as structurally determined systems and other objects as structures, all cohabitate and live together over time. We start to create a way of interacting with each other that they called structural coupling. It's like we grow together, just like a tree will grow around a metal fence post that is nearby it as it gets bigger. These two things become – they're still separate but their structures become integrated. They fit one another and if you were to take the metal fence post out and look at the hole that's left it would be an exact mould, an exact fit of the fence post. The great insight to this that we use in integral coaching is that if

we're going to shift the way of being of a person what that implies is that we have to shift their structure. In order to shift their structure we also have to work with everything in their life that they're structurally coupled with because if we just try to shift their structure, for instance, if we just try to shift the client's structure but don't attend to the relationships that they're in, we don't attend to the body that they have, we don't attend to the physical environment that they live and work in – if we don't attend to the other things that have grown and moulded themselves around their existing structure then trying to build a different structure will be undermined by the current structural coupling. This is a very important insight for integral coaching. They also have a wonderful way of talking about language, Maturana and Varela. They see language as a biological phenomenon which is a big insight. Prior to that people wouldn't have said that language is a biological phenomenon but they see in some sense that biology is fundamental. It's a fundamental aspect that constitutes us as human beings. Things like language and culture are biological phenomena. That's a gigantic insight.

MARK HARTNADY: There was another author that James mentioned, Carl Rogers. I'm not familiar – he did work in psychology as well, I believe.

STEVE MARCH: He was a psychologist.

MARK HARTNADY: I haven't come across his name in any of the research I've done. What was his contribution?

00:10

STEVE MARCH: It's a good question. I know of Carl Rogers' work. His big work that he's known for is called *Client-centred Therapy* and the idea here is that what matters is making shifts in the world of the client, not having the psychotherapist having a more powerful interpretation of the client. It doesn't help the client if you say, what you're struggling with is transference and counter-transference with your wife. That may help the psychologist but that doesn't do anything for the client. Carl Rogers' focus was who cares about the therapist, let's have therapy that's client-centered.

MARK HARTNADY: Like who cares about the diagnosis, where's the medicine?

STEVE MARCH: Exactly. Where's the medicine, how can we actually help this person to be happier, to be more fulfilled? I think, broadly speaking, that was the shift that Carl Rogers made. He was one of the champions of the human potential movement that was sweeping America in the 1960s.

MARK HARTNADY: That's exactly what [[indistinct](#)] was saying.

STEVE MARCH: I think that is a big insight that clearly we as coaches work with. We have our own assessment models as we talked about last time but in a way that doesn't matter; what matters is what happens for the client. Carl Rogers is the one who came up with that shift and at the time he made that shift the practice of psychology was headed in the other direction. It was headed into fancier and more complex interpretations by therapists about their clients.

MARK HARTNADY: Ways to explain rather than ways to help.

STEVE MARCH: I don't know beyond that core shift that Rogers pioneered, I don't know his work that well. I've never thought about it as being, beyond that insight, a significant contribution to integral coaching. I could be wrong about this. I'd be curious to hear what James has to say.

MARK HARTNADY: I'm speaking to him again tomorrow. I'll ask him. Wilbur we've talked about quite a lot. Back to the ten ways, I remember talking about the ten ways and that initially there were five ways which were then expanded on and there was some influence from various authors, Ernest Becker was one of them. Can you remember the separation between the initial five ways leading up to the ten ways?

STEVE MARCH: When I first came into contact with integral coaching in 2000, 2001, there were already ten ways. I don't know the history of going from five to ten.

MARK HARTNADY: James touched on it. I'll pick it up with him. Almaas was the other author he was talking about.

STEVE MARCH: Certainly Almaas' work, and I've studied with Almaas for the last ten years. That's another place I went after I finished the PCC, was into Almaas' work. His work is a significant contribution, particularly at the level of freedom from narcissism, which is way seven or eight. Eight. There's a book in particular where Almaas talks about what it's like to traverse that part of the development, freedom from narcissism. The book is called *The Point of Existence*. That's the primary book that speaks about working at that level. The truth is that I would venture to bet that no integral coach has ever worked at that level with a client because what it takes for a coach to work at that level or to work at any level is they really have to have some freedom from that level themselves. In some regards there are deeper ways in the ten ways; they are articulated there for two reasons. One is to have a complete picture of development. If you take a look at a book like Ken Wilbur's *Integral Psychology* – have you looked at that book at all?

MARK HARTNADY: Not in great depth but I read parts that were relevant for my literature review on spiral dynamics.

STEVE MARCH: So you probably saw in that book that he has these tables of many different developmental models and Wilbur and many theorists in his work talk about, broadly speaking, their pre-personal levels of development, personal levels of development and transpersonal levels of development. When you include the deeper ways in the ten ways what you get are the transpersonal levels of development. That makes the model more complete from a developmental model perspective. That's more academic and not very practical but there is a practical purpose which is that, as you go deeper in the ten ways you're working with a deeper level of ego. You're undoing a deeper ego structure. It is helpful to understand what those deeper structures are even when you're coaching people shallower in the ten ways. You will still see the effect of those deeper structures when you're working more shallowly. For instance, you may be working with someone who's traversing the way of balance and you can see their narcissism. You're not going to help them become free from their narcissism because that would be working at way eight and they're not there yet but you can see their narcissism and there may be ways that you can help them become more aware of the negative effect that their narcissism has so that isn't as much of a struggle for them. They're still going to have the narcissism. Another common example, perhaps the most common example of this

is there is way six, freedom from self-assessment. Self-assessment is like having an inner critic, having a superego. At way six we gain some significant freedom from those kinds of self-assessment. However, when you're working with somebody addressing immediate concerns or balance or conversations, frequently what they're struggling with is their own self-assessment. You can help them to learn new skills, disengaging from their inner critic, of defending against their inner critic, which is very helpful for them at that level but you're not going to help them get freedom from their inner critic until they get to way six.

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It is helpful to understand that these deeper structures exist and that, even though you're not going to be working to free someone from that structure, to really undo something that's that deep, there are skills that you can help a client learn that help them even when they're working in shallower ways. That's the more practical aspect of defining the lower ten.

MARK HARTNADY: Some other names I've got written here, Ida Rolf. We spoke quite a lot about somatics and rolfing. Medard Boss.

STEVE MARCH: Boss is a big one.

MARK HARTNADY: He wrote about the integral approach. I haven't read any of these works. I've taken notes from various bits and pieces. I've got written here is he had an influence on the integral approach.

STEVE MARCH: He had a big influence on integral coaching. As far as I know he didn't have an influence on Ken Wilbur's work.

MARK HARTNADY: So this is talking about an integral method of coaching as opposed to Ken Wilbur's integral methodology. Was he a scientist?

STEVE MARCH: He was a psychiatrist who had been analysed by Freud. He'd been a patient of Freud. He was a friend of Jung and also a friend of Heidegger. He lived in a very interesting location in the world at a very interesting time where he could be at the confluence of all of these ideas and these figures. Fundamentally the most important work to read by Boss is *Existential Foundations of Medicine and Psychology*. That's his most mature work. He wrote an earlier book called *Psychoanalysis and Deseinsanalysis*. It's also good but it's not as mature an expression of his work as the first one. Being a psychiatrist, he was trained as a medical doctor and the basic thing that he saw was that western medicine at that time and unfortunately still today largely doesn't treat people, human beings. What they do is they treat material bodies so the diagnostic is in terms of what's happening with such and such an organ or what's happening with urology, so they're treating the material body. What Boss said was unfortunate was that they were missing the treatment of the human being because the material body is not the human being. When I was talking about Heidegger, and Heidegger said, answering the question of what is human being in terms of the language generated when we ask the question what is this object, that that was the wrong foot to get started on. Basically that's the exact same argument that Boss is making about medicine. He's saying doctors are first asking what's wrong with this material body and then treating that. Boss says you have to say what's going on with this person and work from there to work with the material body. Then you also have to speak to other things because the person can never be reduced to only

material. There's more there. Boss basically created this thinking called *deseinsanalysis* which was picking up Heidegger's term *desein*, which was Heidegger's way of talking about the kind of being that we are as human beings. Boss really forged a new path for medicine and psychology which was how to work with the human being.

MARK HARTNADY: Treating the whole human, not just the body.

STEVE MARCH: This is a gigantic influence on integral coaching but unfortunately has not been a gigantic influence on the practice of medicine. Largely speaking Boss' work is lost to history. It's very hard to get hold of his books because they're all out of print. I started to look around to see if anyone was teaching *deseinsanalysis* and I found one university in Prague that has a course, or maybe even a major in *deseinsanalysis* but it's noted in the history books that psychology, alongside things like existential psychology, Ernest Becker's work and Irvin Yalom's work and things like that.

MARK HARTNADY: So it's something that never really became mainstream?

STEVE MARCH: It never became mainstream and at best it's been folded into existential psychotherapy which is more well-known but I think Boss' work is unique because what he did was he invited Heidegger to teach summer seminars to Boss' students every year for many years. There are actually transcripts of many of those seminars that have been published under the title *The Zollikon Seminars*. It's Heidegger being in conversation with psychiatry students and he literally upends the fundamental basis of their field and gives them something that is far more workable. In substance I think we as integral coaches are inheritors of Heidegger's work in the Zollikon seminars. There are still more riches to be mined there. That's one of the things that I've been working to do and advancing in the somatic area of integral coaching that we are inheritors of that and we also haven't leveraged everything that Heidegger and Boss came up with yet.

MARK HARTNADY: At the end of our last interview I was talking about these pillars that make up integral coaching. You mentioned language, somatics, spirituality and relationships are the core of what integral coaching is all about. Language, you've covered quite a bit and somatics you've covered. But spirituality and relationships, particularly relationships, were there any authors that stand out in your mind? James talks about the fact that Flores left out relationships in his conversations but he didn't give any influence and where the origins of the conversations for relationships came from.

00:30

STEVE MARCH: Conversations for a relationship, and you can check with James on this, was created by a collaborator of Flores, Ken Anbender. He created that but it's true that part of the limitation of Flores' work is that it is, and this is a limitation of analytic philosophy, it's so strict that you can with Flores' work gets into very transactional relationships where our interaction is just request, offers and promises to each other, back and forth. The transactional relationship is the kind of relationship you have with a person at the store. You go to the store and you say, here's what I want to buy and they say, that's ten dollars and you give them ten dollars. It's very simple, back and forth. There's no real depth to that kind of relationship.

The authors that recognise that depth primarily it starts with Martin Buber. Buber's primary work here is called *I and Thou*. Buber was largely speaking a contemporary of Heidegger's and I suspect was somewhat influenced by Heidegger's work but I don't know the full history. Buber spoke about "I and thou", which is really treating the others person as another you, with the full kind of depth and richness, inner-life emotions, ambitions, feelings, sensations as you do instead of what he calls an "I/it" relationship where you just treat the other person as an object, like an "it". That's perhaps the kind of transactional relationship, it's a good way of talking about a transactional relationship where the person behind the cash register at the grocery store, we don't treat them many times as a "thou". We treat them as some kind of fancy machine for exchanging money, for ringing up our purchase and telling us how much to pay. They're like a robot, we treat them like a fancy robot for that exchange and we don't allow that they have feelings and emotions and an inner life and ambitions, love and care and things like that.

MARK HARTNADY: Some other names that have come up around complex systems, adaptive systems, artificial intelligence, consciousness are Senge and Winograd. Have they had any influence on integral coaching? I haven't read any of their works but perhaps you're a bit more familiar with what their philosophies to thinkings were. Peter Senge, he wrote *The Fifth Discipline*.

STEVE MARCH: Peter Senge's work is largely learning, it's complex adapted systems and learning organisations and I think his most recent work is on [\[indistinct\]](#) Clearly we're aware of his work and influenced by his thinking on learning in particular. I'm not sure what else I can say about it. Basically Senge was leveraging a lot of the work that had been done with general systems theory, recognising that nothing is ever fully independent of anything else, that things are connected and there's mutual influencing that occurs between things and that the connections of causality in effect often are spread over long distances of time and space. As integral coaches one of the things that helps us to respond appropriately to the situation that we're in is to remember that we're never dealing with an isolated situation, that this situation is connected to everything else, which is partly why we have to be integral. We have to include the emotions, we have to include the relationships, the bodies, the language, the environment, the culture, things that are happening, because all of that is multiple facets of one reality, of one thing. [\[Indistinct\]](#) has the same fundamental insight there and we borrow that concept from them.

MARK HARTNADY: On the topic of spirituality, there's a couple of quite clinical authors that I've come across, Caplow, Rempasch [?], Fisher and then in the video that was done with James and Stacy at the beginning of the year he talked about Tolstoy, Dostoevsky, Wolfe and Joyce. On the topic of spirituality and Zen Buddhism, monastics being in the world and then there's Zieler and his way of being, how do these authors influence the thinking of spirituality and what spirituality is brought to integral coaching?

STEVE MARCH: I don't know if I can give a concise answer to that question, it's a little too broad, but I think the big thing with spirituality is picking up on what Flores did and recognising that he largely left spirituality out of the picture. What James recognised is that Flores was very concerned with conversations and power and in my language what's possible when you go deeply into Flores' work is to become very powerful and if you don't have an ethical or spiritual dimension that you're also developing at the same time, what that can lead to is becoming a powerful asshole, so that you're wielding power in a manipulative way.

00:40

I think if, in addition to cultivate your ability to act in a powerful way in the world and simultaneously cultivate yourself spiritually what you do is you recognise that that power isn't for you, it's for others. It's for serving people in the world. Spiritual development is a big emphasis here for us. We're so to speak non-denominational so we're not advocating any particular spiritual path but James being Buddhist we're certainly influenced significantly by Buddhism, particular Zen Buddhism. I know that one of the early PCC leaders was also a Zen teacher and many of us are influenced by Zen Buddhism so that is a theme although we're not trying to convert anyone.

MARK HARTNADY: I'm not very familiar with Buddhism. I do know that the Buddha was the one who reached so-called stages of enlightenment or Nirvana but that's all I know about Buddhism. What specifically is it about Zen Buddhism that has influenced integral coaching?

STEVE MARCH: In Buddhism there's a term called Bodhisattva. A Bodhisattva is, if you will, a practitioner of Buddhism who has agreed to forego complete enlightenment so that they can return, reincarnation, to continue to help other beings become free. The Buddhists have a belief in reincarnation and they say you can escape the cycles of rebirth, which is coming back to the world where there is suffering, where you will suffer, and the way that you do that is through complete enlightenment. There's this path called the Bodhisattva path in which you say, I'm going to forego my own escape from suffering so that I may come back and continue to help other people escape their suffering.

MARK HARTNADY: So the central idea in Buddhism is that you will continue to come back through reincarnation until you reach a stage of enlightenment.

STEVE MARCH: It is one of the central ideas and the core central idea is something called the four noble truths. The four noble truths was the very first lecture that the Buddha gave after his enlightenment and basically the first truth is the fact of suffering, that suffering exists and is in some senses inescapable for us. We suffer. I'm not going to remember all the four but it's something like the second one is the cause of suffering, why is that we suffer, which is we suffer because of our attachments.

Part D

00:00

MARK HARTNADY: You were talking about the four noble truths which I looked up on Google while you were offline. Suffering is number one, attachment or desire causes suffering.

STEVE MARCH: The causes of suffering.

MARK HARTNADY: There is a way to free yourself and the fourth is by following the eightfold path.

STEVE MARCH: The thing that's germane to integral coaching about this is that our deepest understanding of what we're up to as coaches is the alleviation of suffering, that in some sense being an integral coach is being a Bodhisattva. We would never say that publicly in a class because that's a line that aligns us a little too closely to Buddhism but that is a deep inspiration of ours and I think if you look at all the world's major religions they have a similar belief or they hold in high esteem the alleviation of suffering. They all will have different language for it but we have specifically been influenced by the Buddhist formulation of this. That's really what we're up to.

MARK HARTNADY: Something that I've wanted to ask, if you had a prospective client that had a problem with a promotion at work, they were trying very hard to get a promotion and they weren't getting it and to help them get through that problem they decided to get a coach in. Where would this come in? You say that to alleviate suffering is the ultimate goal of integral coaching but if I just want to get my promotion does that tie in?

STEVE MARCH: The way that we would approach that in integral coaching is if someone says, I want to get a promotion and I want to receive coaching to help me do that, we would challenge that. We would say for the sake of what do you want to get a promotion? Let's not have promotion be the end that we're trying to fulfil. Let's look more deeply what are we really after here, what are we really going for here and the person may say, because I want to earn more money. We would say, for the sake of what? We keep asking that kind of question to get to a more fundamental purpose that is closer to what the person cares about and then we turn it around. Let's project this out a little bit for illustration purposes. If they say, to get more money and we say, for the sake of what, and they say, to take care of my family, I might say, in what ways do you want to take care of your family that you're currently not able to. They might say, I want to retire earlier so that I can spend more time with my family. This conversation then starts to become a conversation of the quality of family life. We would say why defer having a quality family life till you retire? What if we could work to improve the quality of your family life today? Then the person says, that's interesting to me. What if it doesn't have anything to do with getting a promotion? Are there other ways that you can start to work with, cultivating yourself so that you're more emotionally available, being more expressive, shifting how you spend time with your family and a variety of other things that get to their ultimate goal and purpose in a more direct way than this indirect strategy that they have.

MARK HARTNADY: We've covered a lot and I'm very appreciative of it. The flow of coaching ends, as I understand it, with this action phase and part of that is the coach going away and designing a programme to suit the needs of the client. Could you tell me a little bit about that? You would use your assessment models but how do you actually go about designing a programme, an actionable programme that a client can work with? As I understand it, the flow of coaching starts with that conversation for relationships, develop a relationship with the client. You then enter the world of possibility and discussing a narrative with your client as they speak to you. Through that process you'll do an assessment using those three lenses, those three models, the four, ten and six. You'll invite your client into a new narrative and use distinction metaphors, analogies, stories, play back to them in new ways and possibilities. The last part is action; it's designing a programme for them to work with. How as a coach, what do you do? Is it completely up to the coach or are there other models that you would use in designing a programme?

STEVE MARCH: We use the four domains and the six streams and the ten ways model, in some sense both to help assess and to help design. For instance, when we're designing a programme we want to make sure that we're working with all of the four domains because, when we were speaking about structural coupling earlier, all four of those domains are structurally coupled together for a person. We may be wanting to help them to have a new relationship in domain three but we also have to work in domains one, two and four in addition to three in order to do that. The design has to cover the four domains. That would be one aspect of that. In addition, we would recognise that the client needs to develop competencies in certain of the six streams of competence. The client may need to develop more emotional competency and somatic and relational competency but just needs those three. We would design specific practices and suggest books or resources to read or engage with that would help to build those specific competencies. That would be part of the design. Overall, the design is intended to help the client to deepen their development in the ten ways. The way that we think about the design in terms of how deeply we can go, how challenging we can make the programme, is influenced by what we're helping them to work with in the ten ways.

MARK HARTNADY: From where they're coming from and where they're going to.

STEVE MARCH: So all of those models are both assessment models and design models.

MARK HARTNADY: So you'll design something, read a book, meditate, practice, whatever it is. Your client will then go do that and then what? They'll come back and report on how that's helped them to achieve what they want to achieve?

00:10

STEVE MARCH: What happens is they will begin to engage the things we gave them, the coaching programme or the development plan. We use both those terms synonymously. Frequently they will struggle because if we're really working developmentally with them we're asking them to do things that they initially think aren't right. For instance, I'll ask a client to start a yoga practice and they will think, I came to you with a relationship problem. I'm struggling earning the trust of my boss. Why do you want me to do yoga? I don't get it. It doesn't make sense to me. And so they will not do the yoga practice. We have to re-enrol them in doing the yoga practice and build the relevancy of that to the concerns that we're working with. Most people will struggle in the early days. I typically will spend anywhere from one to three or four meetings with clients just helping them to integrate the whole programme into their life so they're doing the sitting practice, they're doing the yoga practice, reading the books, doing the self-observation. Then we get to see, as they engage in those things, what is their experience, what do they learn about themselves, what new questions arise, what difficulties arise. Then what I do is I coach them, meaning I refine the programme over time, changing elements of it, adding elements, taking elements away and as I'm learning more and more about the client I'll have a better sense of what support they need to learn these new skills. Once we refine things then they need to have time and practice to build skill. Skill doesn't come out of anything other than practising. You have to do it over and over again and observe your results. As they're building new skill and beginning to apply those with greater confidence in situations they are really owning those skills and being able to do what we call the outcomes of coaching, being self-correcting, self-generating and

capable of long term excellence. There's a lot of fine-tuning that goes on after we give them the initial programme.

MARK HARTNADY: Is there anything you feel like we haven't covered that you think could be useful in this report?

STEVE MARCH: Nothing comes to mind. You're already onto the challenge of the project you've undertaken which is that, whenever you're working in an integral way so much is included. If you take a look at the literature that we're drawing from it's not just one field, it's all fields. We're drawing from so many different things but that's really what we have to do in order to embrace reality. No one field has cornered the MARK HARTNADY yet on the truth about everything, especially the truth about human beings because we're so multi-faceted. I think it makes any kind of research project very challenging because you have to read somatics, philosophy, psychology, anthropology, sociology, economics and organisation theory, etcetera, to get a grip on human beings. I think you're right, there's a certain point you have to be practical and say what are the core tests that constitute the method itself, that influence the method itself, and draw line there.

[Pleasantries and greetings]

[End of interview]

7.5. Appendix 4 – Transcript – Interview with Craig O'Flaherty, 28 October 2011

MARK HARTNADY: So, before we start, would you like to tell me how you became interested in coaching, what led you here in your career path?

CRAIG O'FLAGHERTY: Okay. I started my career at Anglo-American as a management trainee and very quickly decided (we got assigned doing projects in the organisation and being PA's to directors) that that was not what I wanted to do. So, I'd done some studying before, but at university I didn't know what I wanted to do so I did a B.A. in politics, philosophy, and a whole lot of other things. And then my dad talked me into going to do an MBA. And I don't know how I got accepted in (Wits) without first having a job. And then I went to the army after that, and met a friend and he suggested that I talk to some people who were in management consulting. So I joined a strategy consulting firm at that stage – Deloitte's Strategy Group – mid 1980's – and worked there for 4 years, and that was a time when South Africa was opening up & some international consulting companies were looking to come into this country. And there were three of us who started "Gemini consulting" in SA, and that's when things exploded. I worked with them and moved overseas with them as well, so worked internationally. Then I was headhunted to come back here, so start a strategy consulting division for Andersen Consulting. So that's what we did, and over 4 years build that into a team of about 100 people. And that went up until 1999. Consulting is one of those careers where you fly-in, fly-out, live on aeroplanes, and I got to the point where this wasn't what I wanted to be.

MARK HARTNADY: OK, so 1999. With Andersen...

CRAIG O'FLAGHERTY: I left them, I was a partner with them, I left, so I got a decent pay out and that allowed me to spend a while, going and sitting on the beach and thinking about what I really wanted to be and 1999 was the second general election and Andersons was running the systems infrastructure and the supply chain for the whole of the election and a

fellow partner of mine asked me if I wouldn't mind sitting down with the chief electoral officer and having some discussions with him about, he was a law professor and new nothing about supply chain logistics and the infrastructure of running a general election, so asked me to sit down with him and could I talk through him strategically about how he could see this, what he could see, so I had a couple of sessions with him and he said, look, what are you doing and I said nothing and he said, could you please come and spend this election with me and I said, what do you mean and he said, be my shadow, walk with me, talk with me, debrief with me, go to meetings with me and I thought, wow, that's interesting and so one thing happened and that's what I did for 3 months, sometimes 24 hours a day for 3 months, but what it became is, we did that, I built a war room for that, so a place where he could come and see all the data and numbers and stuff happening, I had a team of my strategy consultants, Anderson's kind of contracted in to do that, but the part that really shifted for me was working one on one with an executive or a leader and saying, what are the challenges that you're going through and how do you need to shift and change and then I knew that this was the work I was born to do, that's when I found out and at that stage I looked around this country, that was 1999, there was nothing, no one above coaching and so that's literally when I got onto the internet, looked around, came across about 6-7 of the top coaching businesses and I phoned them and interviewed them all and I spoke to somebody at New Ventures west and whatever happened just resonated.

MARK HARTNADY: Can I pause you there, you already at that stage using the word coaching, you.

CRAIG O'FLAGHERTY: I went to him and I was his adviser, his guide, etc, but what I started to realize, I was doing a bit of reading is that what I was actually doing, I was coaching him.

MARK HARTNADY: What made you realize that what you were doing is actually coaching and...

CRAIG O'FLAGHERTY: Just the reading I was doing at the time.

MARK HARTNADY: Can you remember what it was?

CRAIG O'FLAGHERTY: No, I think there were a couple of articles that I had read and somebody saying to me saying oh, sounds like you're a coach on the sidelines for him and that started to resonate, I didn't even realize that there was such a thing called coaching in those days, certainly this country didn't and that's when I basically flew across to New Ventures west and I did their two courses and then connected very well with James and he said, look, we're running another year long program called leaders in training which is we might want to spread this stuff around the world, would you be interested and so I went over for another year and at stage I spent nearly 14-15 times going backwards and forwards between here and San Francisco so I really connected deeply with James and that community.

MARK HARTNADY: So what programs are they? The PCC?

CRAIG O'FLAGHERTY: The CTE and PCC and then the business, or the coaching leading training which was run once, they ran it once to train new leaders in the program.

MARK HARTNADY: So you were coaching this executive at (?) and then you completely stopped doing that, moved to San Francisco to do these courses.

CRAIG O'FLAGHERTY: Chief electoral officer, I'm not an executive at ...

MARK HARTNADY: Sorry, chief electoral officer, with the government?

CRAIG O'FLAGHERTY: Ja.

MARK HARTNADY: So then you were in San Francisco for a year I would imagine.

CRAIG O'FLAGHERTY: Yes, but I was coming backwards and forwards, it's a modular course like it is here.

MARK HARTNADY: So you were working at the same time?

CRAIG O'FLAGHERTY: No, I'd literally taken a sabbatical for a year to kind of say, what did I really want to do. At about that time, this is going back 10 years, I migrated my family down to Cape Town, said, look if we're going to change life, let's change everything, so we moved down to Cape Town and I bumped into Janine, because I approached the business school and said, look I'm doing this, would you guys be interested in coaching, at that stage, nobody knew what the hell it was, but I bumped into Janine and I helped her facilitate the company analysis course because of my strategy background and I started talking to her about it. I started actually coaching her as one of my case study clients for the PCC course and one thing led to another and I approached the dean of the business school and said, this is what's happening, this is what is happening world wide, would you guys be interested in running coaching and he said sure, why don't you try a few courses.

MARK HARTNADY: Who was the dean at that time?

CRAIG O'FLAGHERTY: Its two deans ago, his name will come to mind.

MARK HARTNADY: Elspeth was the MBA director.

CRAIG O'FLAGHERTY: Its gone, and I thought, he was very visionary because I think he saw this, realized it and one thing led to another and that just exploded and 10 years later this is our 10th year, next year will be the official 10th year.

MARK HARTNADY: So this was 2001.

CRAIG O'FLAGHERTY: Yes.

MARK HARTNADY: So that's when the CFC was opened? And Janine at the time, she was doing the CAP course.

CRAIG O'FLAGHERTY: Yes, she was doing the company analysis course and basically I went to the business school, they said it would be great to have you running it, but I don't want to work for you, quite frankly I don't want to work for anyone else ever again, they said, let's make sure that we've got university presence in it and Janine's name came up and she

moved into it and she became the academic director of the centre and things just unfolded from there, we were just running CTE's at that stage and then we started running the ACC and then 6 years ago we ran the first PCC course, the first year long course and its just exploded, literally exploded and I think what its saying is there is this incredible deep need out there for coaching, especially in this society and so I spend a lot of my life there, but Janine and I also run a private coaching business which does coaching work for clients and leadership development work for ...

MARK HARTNADY: This is outside the centre of coaching.

CRAIG O'FLAGHERTY: Outside.

MARK HARTNADY: What is the rationale behind that?

CRAIG O'FLAGHERTY: Well, because the one is a partnership with the business school and the other one is our own and what the business school is never going to do is, if you have a partnership with the school, its never going to pay, so I'm not doing this work because I want to do work, I'm doing it because I love it, but I also need to feed the family, so that part of it is the entrepreneurial side which is really great and that's literally exploded around the world to Australia, Kazakhstan, all over the world, its amazing.

MARK HARTNADY: OK, thank you for that, so some of these questions are, let me explain it like this, there's two ways I've thought about doing this. The one is going back in time as far as your memory will take you that is relevant and talking about all the influences that you've had or that you've been exposed to really in coaching and trying to elicit what were the important pieces for starting what coaching is today and looking at the various models, the flow of coaching, the kind of pillars that make it up what it is and talking about each one and saying, well, lets talk about the 10 ways, where did that come from. I'd like to do both and I've got some questions which relates to each, in the interest of time I'd like to start with the latter, so there are a few things I'd like to cover, specifically and if we go through how those came to be I would have achieved the bulk of what I want to achieve, so I did list them down, so if you go to question 5, lets start with the flow of coaching, so from building a relationship, to openings to the assessment models, James talks a little bit about that in the interview I had with him, but anything you want to add there?

CRAIG O'FLAGHERTY: I suppose the first point is that relationship is the foundation for coaching and so if there is anything that the coach and the coachee, especially the coach need to be focusing on, its can I build the kind of relationship where freedom of expression, trust and the ability to really, from the coachee side, really unload what I'm coming into the session with and to really trust that the process is going to allow me to unpack things in a very different way. I think that's from the coachee side, I think from the coaches side, I think the trust is critical, it is one of the things we talk about in the coaching work that we do, is that yes, I need to see, I need to hear, I need to engage with somebody, but we talk about a concept called compassionate dislodgement and I think its really key that if I'm coaching somebody, there are going to be times when I need to ask the tough questions, when I need to reflect back on them and say, but you said one thing here, you're saying another thing here, they are inconsistent, or you said this last week, now you're saying this this week, gently, but very compassionately, what is really going on for you here? Also ask some of the tough questions that I think coaching needs to ask. I think if trust is in place I think you're called on

as a coach to ask the questions that nobody else would be prepared to ask themselves, so I think that is why trust is fundamental to this relationship.

MARK HARTNADY: And in terms of your own experience, what brought you to realize that. I'll give you an example, when I ask that question to James, he noticed that in the teaching of Flores, Flores is quite direct and both Werner Erhard's and Fernando Flores's methodologies in doing this kind of work excluded building a relationship with someone and yet that seemed to work for them. James came to the conclusion that relationships are essential for much the same reason you have said. What made you realize that?

CRAIG O'FLAGHERTY: Its interesting because 10 years ago when I met James, he was in the transition between being somebody who came out of the Flores and the (?) school and he was transitioning into the work that he does now in Buddhism, so I met him at the stage, James 10 years ago was a very different human being to what he is now and so the interesting experience I had with James is seeing the flashes and feeding the flashes of questions and observations which I offered without concern for the individual, but seeing the work he has been going through himself to actually realize, perhaps there is more, perhaps the razor sharp question thoughtlessly offered just because its going to open things up isn't always what works, but if I really think deeply about it and I trust that it shouldn't only come from my head, but also from my heart and should also come from my sense of awareness of myself and the other person is really keen, so that was an interesting transition and I smile at that question because 10 years ago it was a pretty tough place to be, but its evolved, 10 years is almost a life time in life and its been fascinating to see how integral coaching has evolved into something where compassion and compassionate dislodgement, not just dislodgement, because Flores would have said, dislodge.

MARK HARTNADY: You need sometimes a break through.

CRAIG O'FLAGHERTY: You need sometimes a break down, not even a break through, but I think this combination of compassion and dislodgement I think is what is making this work truly beautiful in the world, so don't hold back on what you are saying, but there is a way to say it and there's a how to say it and there's a, am I genuinely concerned for the well being of the individual when I ask and frame that or am I genuinely concerned that I've got to get to the answer, this can take you on two very different routes.

MARK HARTNADY: Did the experience that James have, he talks about going on the Zen retreat in the video interview that was held in May this year and being exposed to a world of love and that world of love being a lot more powerful than the kind of forceful, fearful methods that (?) would use, does that resonate with you in terms of your own history and moving from quite an analytical environment if it were, so to speak. Was there a moment in your life where you realized, as James did that compassion is really key and works?

CRAIG O'FLAGHERTY: Sure, when I had come from consulting, the training that I had received is be three steps ahead of the client, never let the client catch you out, be incisive, literally, sometimes, in a boardroom for the chief executive, make sure that you are in control of the boardroom because you are prepared to and can have the intellectual capacity to challenge him or her in her context and build the kind of relationship with them where they are starting to look to you. That was never said in that way, but that's ultimately what many consultants out there are trying to do, run three steps ahead of you, that's why we're paying

you and together you and I will make that happen. The way of being that I had has changed radically since then in terms of trying to engage people from a point of I'm not quite sure I know what question to ask next, when I'm asked questions, I don't know the answer to that question. I suppose the last 10 years for me, walking out into the world and not depending on anybody else, going through my own personal challenges, health wise, family wise, starting a new business wise, all of those have been deeply humbling, so its been a wonderful experience to kind of see the world as it really is rather than it being inside a protected environment of a partner on an organization I get paid a multi million dollar salary and I'm safe and I'm OK, this has been a very different experience, so where is the next cheque going to come from, where is the next client going to come from, but it's a choice that I'm deeply grateful that I made.

MARK HARTNADY: Do you feel that there is a trade off between security and freedom in that?

CRAIG O'FLAGHERTY: I think so, I think security becomes handcuffs, security becomes a prison where you become imprisoned in the need or drive for security, but ultimately when your on your own, I think its experiences of witnessing what James went through and what other leaders of this course have gone through and my own experience that has been hugely powerful.

MARK HARTNADY: OK, that's great, relationships, so back to flow of coaching, the assessment models, you are familiar with them, the 5 elements, what was your influence, contributions, reading any literature, can you elaborate on any of those points?

CRAIG O'FLAGHERTY: Contribution to the models. I think the contribution to the models, when we first started doing this, it was always do the 10 ways and if you look at some of the latter stages of the (?), there is a fraction of the human race, ever, in history that has ever got down to those stages.

MARK HARTNADY: Freedom from death.

CRAIG O'FLAGHERTY: So I think one of the contributions, when I joined there was two leaders, there was James and one other person and then I was the third leader that was certified to run it, so there have been a triad of us from about 8 years ago that have been looking at this.

MARK HARTNADY: Who was the other leader?

CRAIG O'FLAGHERTY: (? Chowoola?). and it would be good for you to talk to her because I think she's really good and she is a foil for James, James has been a razor and she has been a silk cloak and I think that combination, when combined together is deeply powerful in coaching. The capacity can be hard and direct and incisive, but the capacity to also hold or context the situation and the person and I think we need both, I think the illusion sometimes is just be nice, just be soft, I think that is also an illusion, often people make that mistake. Coaching isn't about making the people feel good, its not about making them feel OK, sometimes its about making them feel not OK, but in a very compassionate way that they feel held and feel seen and safe, so I think contribution wise it was a case of saying, but if all of the world, many of the world are going to get to the ways, why are we concentrating on the

10 ways. The 10 ways is a philosophical, I think it's a web of all of the philosophies that James has been exposed to. All the way from Jesuit priesthood into the work of Fernando Flores, into Martin Hiligar, Marturana, etc, he's woven a web which takes a lot of their work and actually says, perhaps there is a way of being that people are shifting through, but really in the advanced coaching that we do, we really only focus on say, probably only the first 5 of those, its where you're going to find 90% of the human beings on this planet, including yourself.

MARK HARTNADY: Just to better understand the model, the model kind of builds layers upon layers, so immediate concerns is so let's get through that and then move on to the next stage, is that the intent.

CRAIG O'FLAGHERTY: I think it's designed to do that, but the important thing is what its doing, I think its saying, if I am very much like a step ladder, if I am descending down through the ways, I mean, the first thing is, often what people do is to say, there are only 5 ways, but I think the problem with that is saying, people enter, they dwell in and they exit, so actually, there is actually in the first 5 ways, there are 15 stages of where a person is, so I think what we're trying to say as coaches is and I think the reason it was drawn that way, many modes, especially in the strategy are drawn in terms of that way, so we ascend, so what this is saying is, descend into the depths of who you really are, because gravitational forces work that way, that is what gravity does, so what is the gravitational force that is pulling you down, what is the force that is pulling you down deeper into your awareness of who you are and where you are in the world and I think the power of that is to say, can I as a coach identify where the person is and how do I make sure that I coach them at a level lower than that so that actually draws them into that and I think that is extremely powerful, its powerful in terms of saying, don't meet the person where they are at, meet them where they are at, but then make sure there is some kind of trajectory that we are trying to coach the person into and we are trying to build them into that.

MARK HARTNADY: James talks about always coming in at a level below where the client is, is that what you're talking about there.

CRAIG O'FLAGHERTY: Absolutely.

MARK HARTNADY: So the logic behind that is, do you want to elaborate on that?

CRAIG O'FLAGHERTY: I think the logic is, if I coach somebody at a level where they are comfortable, so if I'm meeting them in an immediate concern and they are entering immediate concerns, the danger of that is that if I coach you at the level that you're at, all we do is we have a dialogue, we design up a coaching program which matches you. The danger is that if that can re inforce exactly where you are and who you are. If we coach at a lower level, in other words, have practices and observations and reflections and exercises which actually stretch you, if she pulled you beyond that, that is going to be very uncomfortable for you, its not going to be hey, I'm loving this, its not going to be this is like a warm, woolly jacket, its going to be, this is really touch and hard and I'm really uncomfortable and there what I think the coach is doing is saying, what in the discomfort are you learning about yourself. What about being pulled out of your zone of comfort, because now you are witnessing yourself backwards and saying, I'm not here. I'm here, but I would love to go back there and the coach is gently saying, but here is where you get perspective, its where you get the capacity to see

yourself in context, its where you get to feel yourself in context and sense yourself in context, because you are out of that zone and I think that for me is the real power of integral coaching, don't coach the person where they are, coach them where they are moving to, so that it does not feel that this is a joy ride.

MARK HARTNADY: That makes a lot more sense using this analogy of climbing down the staircase because James didn't explain that to me, if you think of the level below, you think well, I've been there so I might go here, shoot for the stars, reach for the moon.

CRAIG O'FLAGHERTY: Absolutely, so what we're really saying is, descend into yourself, descend into the ways and does that help me to ascend in terms of, sure, it does, but I think that's the power is, how is the person going deeper and deeper into an awareness of themselves and that is why I think the model is beautifully drawn the other way around and explained that way.

MARK HARTNADY: Just continuing a little bit more on the 10 ways, are you familiar with, you touched on them a little bit, but in detail, the influences for why those 10 ways are not another 10 ways or 7 ways.

CRAIG O'FLAGHERTY: I think this is one of the philosophies that makes integral work so strong. What its saying is, very often what people do, many of the theorists will come across when I'm talking about a strategy philosopher who has his own philosophy on what strategy is, what I'm talking about a doctor who says here's my philosophy on what healing is about. I think what integral coaching is trying to say is that insight and power in any one of a number, in fact countless insights, but the key issue is how do I actually find a way of combining those into a web where I integrate the insights, don't try to distance. My insights are better than yours and I've moved ahead and I leave behind. I think that's a failure of modern scientific thinking. It always tries to ascend where we come from. What it doesn't necessarily try and do is to say, those were insights that were valuable, here is the newest theory, but there is still insights that are extremely valuable, why don't we integrate them in and build on top of. I think so much of the modern world is leave it behind, all design, transition out of cut away, dissect, instead of integrated in.

MARK HARTNADY: Building concentric circles.

CRAIG O'FLAGHERTY: 100%, although like the Russian doll concept, which is, but there are layers and I think that for me is a much more powerful way of thinking, is what are the lessons of the past that are valuable, how do they influence thinking and how do we evolve them, shift them, shape them so that they keep evolving and I think that is what integral philosophy does, so keep winding additional threads around their web and if new stuff comes back, but the irony is that so much of the stuff that we actually find is actually old, its been around, its been forgotten, dropped off, hasn't really been understood ahead of its time and I think what integral coaching is saying is keep looking backwards, keep looking forwards, but most importantly, keep making sense for it now, what sense does it make now and I think that philosophical way. I mean, one of my graduate majors of university was philosophy, so I suppose that's an important part of, even though I moved into the business world, that has always been an important part of my thinking is, don't try to come up with a new school of philosophy, try to come up with what commonalities and overlap, I mean the far more powerful thing is that if everyone has got a way of thinking, we map them countlessly on top

of one another, the more important thing is, what's in truth is somewhere in the middle and the different perspectives that other people have helped provide perspective and distance and space and we need both and. Ja.

MARK HARTNADY: That's great, thank you. Similarly the 6 streams. What is your experience with that?

CRAIG O'FLAGHERTY: I think its been very powerful because I think what's its saying, when you coach somebody, often what we do is, I think the mistake people often make is what should I coach, should I coach the personality, should I coach the role, the problem that the person is encountering and there are countless other schools of coaching and countless other philosophies of what you should coach. What integral coaching is saying, what if we looked at it in a different way, lets actually avoid the problem and say the problem is showing up in how the person sees the world, how they feel about the world, how they sense the world, what their sense of meaning is for the spiritual stream and if you look at it, I think the powerful thing that the 6 streams are saying is, how would you notice that this problem is showing up across the streams, but how would you make sure, when you coach it, you are also taking into account the shifts and the changes that each of the streams needs to have for the person to shift lower in the ways, so you can't get somebody to shift down in terms of the ways from immediate concerns down lower in immediate concerns if you aren't only focusing on I feel better about myself, they are going to have to change somatically, they're going to have to hold themselves differently in their body, they are going to have to feel differently about themselves, they are going to have to have and develop a difference sense of meaning and purpose, so all of the streams need to be engaged if we design a coaching program and that is what I think makes the streams powerful, so the focus is what is the journey they are on, what is the trajectory we are trying to do, what is going to shift, but what is unique about this person's streams that has to be taken into account and built into the coaching program and I think the powerful, for me, its always about saying, there are domains that we map, there are 6 streams that each person has and then there are 10 ways and I think the most powerful way and its difficult, human beings can't think three dimension, so if we try to say map those three models on top of each other, we would get lost but I think that is what the models are trying to do is what are the three lenses, if I had three lenses that I could look at a human being through, what are the three lenses I can get which give me very different perspectives, but almost like triangulation, allow me to zero in on this person that is stuck.

MARK HARTNADY: Interesting. One of the streams I don't fully understand and it's the integrating stream, is that just a concept to explain that these 5 streams need to be integrated together as one, or is there some unique aspect or component that you could distinguish, say this is the integrating stream.

CRAIG O'FLAGHERTY: I think unique and incredibly powerful, if I could use an example, for example if I was a musical student and I was learning how to play the piano and I learn how to play each and every single note perfectly and I could play all of the notes perfectly, the problem is, I could never make music because I need to find a way of making sure that each note flows into the other and that the notes flow into each other in a way that makes sense and that there is music that gets credit, because I could play those notes in a certain order and it would be garbage so I think the integrating stream is actually saying, the person has a series of competencies across a series of aspects, but how they are able to integrate them in a way that actually comes across as consistent, whole, coherent to themselves, coherent to

the world and whether they are actually able to use those things collaboratively to work on challenges, issues or problems that they are trying to steer or navigate themselves through.

MARK HARTNADY: How would you assess that though, for example you were coaching a client and you were able to establish that very (commentively?), intelligent, very emotionally intelligent, (?) structure, in tune with their spirituality, how would you be able to assess that, but there is a problem with them integrating all of these aspects of their persona.

CRAIG O'FLAGHERTY: I suppose it comes down to the point and we do it often in life, is we division our lives, I'm at work now, so this is who I am and then I go home and I show up differently and then I'm with my friends and I'm slightly different and if somebody was to witness me through those 3 experiences they would say, its not necessarily the same Craig that is there, so the lack of integration is, am I consistently showing up in the same way, which context I happen to be in, whether that is the context, whether that is the stage of crisis that I'm in, whether that is the growth or evolution that I'm in, whether that's I move into a new role, is Craig the Craig that I meet consistently, what does that Craig change into a vast array of shadows or a vast array of different types and I think that's what integration is, how consistently are you really being you.

MARK HARTNADY: That's really interesting, I don't want to divert here, a lot of the reading and work that I've done, what I've been able to ascertain is that human beings in their natural state will continuously adapt to their environment in a kind of instinctual survival, use survival mechanisms to adapt to their environment and that does explain why people are different in certain environments. If I'm with my family I will come across as more strong, emotionally intelligent, where if I'm at work I'll be more cognitively intelligent and that suits, I would presume, this kind of drive to survive, yet what you're saying now flies in the face of that. You're saying that to be a whole person you do need to be or have integrity as it were, how does that paradox, is that a paradox for you?

CRAIG O'FLAGHERTY: I think it's a paradox for all of us, but I think human life is paradoxical, I think the issue is, I think what we're trying to do in life is, can I really try and understand the essence of who I really am, when I strip away layers, education, race, language and all of the stuff that is veneered around me, and all of the stuff that I choose to put around me, whether I choose to dress that way or I choose to read that way or I choose to be in a certain place is how I really discovered who the core of who I am is and I think that is the journey that most of us are on in life. Because once I can identify who that is, strip away the layers and say, but that's the truth of who I am, I start acting, speaking and saying things in a very different way because I am happy that I am who I am, I'm not trying to be who I would like others to be...

MARK HARTNADY: I know what you're saying.

CRAIG O'FLAGHERTY: And I think that that's our real struggle in life is to be needed, wanted, accepted, respected, known, integrated, held and I think it's the twists and turns that we take as human beings, knowingly some times and hugely unknowingly to just show myself in a way that you will like and respect and I think that's our biggest suffering.

MARK HARTNADY: Certainly, OK, we touched a little bit on the four domains, as I understand it, the way that the four human domains is used in integral method, its been an

adaptation how the masses(?) for models which was then built on by Ken Wilbur, which became the four quadrants, all levels, model, and in integral coaching its slightly adapted in that the two, sorry, there were three domains and there are now 4 domains, with the two I-domains being one external, one internal, do you want to talk a little about that, where that came from, how you've used it in the work that you do.

CRAIG O'FLAGHERTY: Sure, I think the original place where it came from, before James came across the writings of Ken Wilbur is the work of Jurgen Habermas, really talking about and trying to understand that how do we find a way and I think models are like this, we always tell our coaching students, use models with very soft hands because I think what you do when you start using a model is you start, every model has its own structure of interpretation and so what you're doing, when I use a model and I try to fit you into that model is I'm making that horrendous mistake of saying how does this unique human being, how can I find enough to actually validate why they are here instead of saying, perhaps they're beyond the model, perhaps they are beyond the boundaries of that, so there is always this paradox, but I think the power of (?) is really saying, for me, is what is the essence of what this human being is to and of themselves and for themselves. How do they actually take that presence or lack of presence out into the world and how does it engage with and interact with community, society, family and other human beings.

MARK HARTNADY: Just to understand correctly, that model is used as an assessment, is that correct?

CRAIG O'FLAGHERTY: One of the ways its used is as an assessment, but I think even before its used as an assessment is, I think the more important thing is, I think this is something relatively recent in integral coaching is, what is the narrative that this person is living, what is the story and story telling is such a vastly ancient tradition and I think its really powerful that we started using narrative in this coaching about 5 years ago. I think the more important and profound use of that is and you can see how far I've gone from the left brain that I used to be because the strategist in me would have loved the model, but now for me this is about saying, how does this help us to narrate and help the person to narrate the story of how they live in their lives and I suppose one way of looking at the (?) model or the four domains model is it might be, here is a way of actually saying, if I wanted to understand, let me use a metaphor, if I wanted to understand how successful, lets take a practical, how successful an executive is in playing his or her role, there are a series of domains whether that's about one on one relationships, whether that's about leading numbers of people, whether that's about integrating and (?) information, whether that's about predicting and assessing what the future is, whether that's about monitoring competition, those are a range of domains that that executive has to be competent in, we could come up with a wonderful different way of saying here is a multi dimensional domain model of successful executive and I think what the (eyeweeit?) is trying to say, what are the domains in which we navigate through our lives all of the time, where do we tend to hang out, how do we hang out in those domains effectively and how do we experience, if we experiencing a break down about relationships, how is that breakdown actually showing up in each of the domains and if I built each of those domains, my competency to operate in each of those domains, would that start to shift that issue.

MARK HARTNADY: OK, that is making a bit more sense. So, if you were working with a client and they were constantly using I vocabulary, so always talking in the first person, never

talking about anything out there, material relationships, groups of people, you would identify that as this person is quite honed in on themselves, let's explore how they see the interaction with other people and go into the other pieces of the domain to kind of open things up, is that the intention of the model?

CRAIG O'FLAGHERTY: That's the intention, but there are multiple ways, it's not only what they are saying, it's sometimes what they are not saying, so when they speak about things, they may always speak about it from a particular perspective, they'll only speak about it from the perspective my thoughts, my views etc, they wouldn't actually say, for example, what other people are saying, they would also not say well, world trends are showing me this, the latest statistics and numbers are showing that the patterns are this, so it's giving me a wonderful way of actually saying is the person actually saying I have noticed that other people are doing the following, it's helped me reflect on what I'm doing, I have actually integrated information into that and I have this complete picture of what I think is maybe happening and that is helping me to decide. That's an example of somebody in a line who is thinking integrally, but if they are not thinking integrally they are going to tend to focus in a particular domain and kind of use that as the home from which they operate.

MARK HARTNADY: OK, great. Interesting.

CRAIG O'FLAGHERTY: I wanted to check with you, is this the kind of specificity that you need?

MARK HARTNADY: Absolutely, it's great, something I must also emphasize that this is an MBA thesis, I've got 2 months to do it, it's not a PHD, I can't go deep into anything, so really what I'm looking to do is get themes and understand the logic of these various models and assessments and certain things. Two things I want to keep talking about, one is the flow of conversations where that came from, the logic behind it, how it's made effective and then next is this introduction of spirituality into the integral method of coaching, so just on the flow of conversations, this relationship possibility in action, from speaking to James, he was mentioning that the conversations, the idea for conversations came from Flores' teaching, but he was more focused on possibility and specifically on action. James then brought in this third conversation of relationship building and establishing trust with a client first to widen the scope of the user conversations. Have you found this to be an effective tool.

CRAIG O'FLAGHERTY: It's so effective to me that if there was only one thing that a person, if somebody came to me and said, look I got 5 minutes, tell me the one thing that I should learn about coaching, I would say, if I could leave you with a sense that conversation, sorry coaching as a relationship and in human beings, the only way we conduct relationships is through conversation, that is what separates us from other beings on this planet, they have "conversations" of different kinds, through sound, through echo, through vibration, but we are the only being that has, it's not only the tonality of my voice, not only the loudness, not only the sound, but it's also what I'm saying that is key and also I can take the same word and I can inflect it in very different ways, so I think because we are human beings it's realizing that coaching is a dialogue, I don't come in and put my hand on your head and go mmmmmmm I got you, I download through conversation, so I have to, I also don't, as many psychologists may do, I don't sit and just observe you and say your body is doing this and your body is doing that, which I have some challenges with because I'm not sure that necessarily body language is universal, I don't think it's universal at all in human beings, so I think different

people do different things which mean different things, so our conversation is the architecture of coaching, so I think that what that model has done is to say, where is the person actually hanging out firstly, are they the kind of person that actually prefers to move into action without understanding the need for relationships, in fact action without relationship in their own lives is futile. Sure you can have it but then you're dictatorial or then you're imposing on the world or then you're literally a loner, but I think its realizing that not only do I need action, but I need it in the context of relationship and the other one is how are we thinking which is the fulcrum at the centre which is do I walk into a challenge, a situation, a discussion with somebody and am I prepared to take the risk of living in possibility or do I come in with my view, my idea, my thought, my way of doing this which inevitably is a dead end or inevitably is going to get me into trouble. So philosophically I think it's a powerful way, you know people said to me, what happens when coaching dies and its gone and it will, it's a transition, it will go, but the things that will never change are relationship, possibility and action and we found some exciting ways to use that without doing coaching smooching, going into leadership teams and saying, what if we worked to build your capacity to have relationship possibility and action conversations. What if we taught you about leadership conversation and that's the exciting thing, so whatever conversation you're doing, whether it's a coaching one or whether its me sitting down with my son and saying, boet, we need to review what you're doing at university or whatever it is, am I in relationship possibility and action and can I integrate those three and I think that's why its such a powerful model.

MARK HARTNADY: That's great. You mentioned something there which resonated with me that human beings are unique that in addition to using tonality and speech and body language which with other animals, so to speak use, content is very important and I was thinking in my mind as you said that, that's true because that's where interpretation comes in.

CRAIG O'FLAGHERTY: Exaclty.

MARK HARTNADY: I mean, if a dolphins in the ocean and its making an echo sound, it can only mean a very limited number of things and similarly in nature, however, with people, when you say something to someone using speech and using language it can be interpreted in so many different ways, is that where this model for understanding a persons structure of how they interpret the world came to be?

CRAIG O'FLAGHERTY: I think what structure of interpretation is saying more than that because people often ask where does structure interpretation hang out and I think where it hangs out is in our body. Our structure of interpretation lives in our body, all I'm saying is that an important part of our structure of interpretation is how we choose to narrate the world. Two people go to the movie, they watch the movie, they come out, how was the movie for you? The language that one person uses fundamentally different and it will tell you, it will be an echo into their structure of interpretation. So language is a powerful window into the structure of interpretation but I think that its more than that, because I think when we help our clients to recognize the language that they are using, but we help them to realize that in shifting that language, not only what they say, but how they say and where its coming from. That's what starts to allow them to shift, somebody walking in and saying I can't, I never, I shouldn't to be gross, that will be unfortunately the cell that they will live in, when they start to talk in possibility, that will be the start, not the answer, but the start to them actually seeing something in a different way and I think, I can't, who knows if this is true, but there are some fascinating examples about the fact that its only when we language something that it comes

into being, the most graphic example I've ever heard and I don't know whether this is true, but it resonates for me is that the only reason the Spanish conquistadors conquered the islands of the Caribbean when they did conquer those islands of the Caribbean is because the indigenous people didn't know language for sail boat, so they couldn't see it, but when they got into a row boat, they could, but then it was too late, now people may, ah, come on, that's, who knows, what is it that we cannot see around, if I go to a painting and I look at it and then somebody comes up to me who is more experienced and says did you see the figure in the background and I say, oh my goodness, there is a crowd in the background, I never even saw them, then how is it that we are possibly not missing that in the world around us all the time.

MARK HARTNADY: Interesting example that you used there. I just watched a video the other day called, What the bleep do we know, I don't know if you've seen it, its exactly the same analogy that they use, interesting. That's great. Spirituality, this was something that was missing from coaching if it was even called coaching back then, which became something which was quite important, do you want to talk about that a little bit?

CRAIG O'FLAGHERTY: I think the spiritual domain is such a powerful domain because its really saying, I think its that contrast between spirituality and the distinction between that and religion which I think is profound because often many religions are long devoid of the spirituality they may have originated with, but the spirituality is really asking the fundamental question about what is meaning, what is the meaning, am I exploring meaning in my life and when somebody says they are spiritual less persons, its not that they're not or going to church every Sunday, sometimes I think in the modern world, not that that's good or bad, but sometimes that's irrelevant, the question is, are they prepared to sit in questions and meaning, I wonder what the purpose of this is, I wonder what is actually going on, I wonder what that actually means, I wonder what this is saying about me, I wonder what this is saying about them. Do they live in meaning or as many of us do and all of us have this problem of how was the ride to work, no idea. Not at all, which roads, did you take, what did you see on the way, no idea, can't remember, and that is when we're living out of meaning and that is an unspiritual journey. A spiritual journey, how can you have a spiritual ride to work, that is weird, well, ok, its weird, but actually maybe along the way I was noticing, I was observing, I was aware of my body, I was seeing and I was actually conscious, fully conscious and aware of how I got there, what happened on the way and what each stay of the journey was and I could narrate it to you, that to me is what spirituality is about. Which allows me to ask more fundamental questions about why we are here, what are we trying to do etc, rather than just being a mouse on a wheel which is I just turn the wheel and I think that is what spirituality is all about, is asking the question of the coachee or encouraging into them is what about if you started to ask broader questions about why and what is actually happening here, I know we're focusing on you and your relationship with your boss, but what do you think this is saying about you, what do you think this is saying about relationships, what do you think this is saying about you and your life and what you've done up to now, what do you think this is actually allowing you to see that you might not have seen, that is where I think the coach needs to keep going, yes down to the detail, but out into the broader perspective, down into the detail, out again and I think for me that is what spirituality is all about.

MARK HARTNADY: Do you think this is something which is important. In all kind of echelons of society and people's different income levels and (?) groups and all sorts, I ask that question because I'm picturing the Chinese worker who is assembling parts for shoes or i-phones or whatever it is has a very mechanistic job, who, if they were to enter into that world

of questioning and becoming aware of why they were doing what they were doing, then they may want to remove themselves from that.

CRAIG O'FLAGHERTY: Here is the irony that we don't necessarily know, we think because we're more educated, we've got more knowledge, more understanding that now that we understand it that makes us more spiritual, I think the question we don't really know because we don't know how to ask that Chinese worker is perhaps they are more spiritual than us because they do understand and they've made peace with where they are and what they're doing is they find meaning in that lace thread through etc. All the practices that we do to become more spiritual, we could talk about meditation, whether you talk about praying, whether you're talking about, what do they all do? They are all about coming to back to me, instead of living out, he's at school and I wonder about that and next year where are we going to go and the economy, does the Chinese worker really think about those things? I don't know, I think I'm putting a challenge on the thesis on the table that maybe its we that have lost our spirituality and are trying to find our way back, maybe he is very OK with himself, we don't know.

MARK HARTNADY: Next MBA, I've got another half an hour I think, no, we don't, another 25 minutes, that is good. What I'd like to do is go back to the beginning and talk about your exposure to the history and I know that maybe you weren't there in all these moments in time, you were at the interview with James and (?) at the beginning of the year, do you want to talk about what your understanding is of how integral coaching came to be, what it is through the experience James had, through his Jesuit teachings, Rolfing, Somatics, his introduction to est, could you add anything more about the founding of Hermetet, do you know anything about those events in history?

CRAIG O'FLAGHERTY: I suppose the only way that I can answer that question honestly is to say that what I've made a purpose to do over the last 10 years. When I leave you today, while I'm dressed casually, is I go away for a silent retreat for 10 days and it's a meditation retreat and that's been something I've been doing for 5 years. The only way that I've actually discovered those things, I have a rolfer(?) that I work with, when there is a new body practice I discover, I go and do it, if I'm going to assign a body practice to my client, I go and do the body practice first and then I come back and say here was my experience of it and not that I'm going to tell you, but when they sit down with me, I mean that is a beautiful example of Ghandi, the story, the diabetic sits down with Ghandi and says, great master I am a diabetic, I cannot give up sugar, I am eating myself to death. Please, I have a family, I have children, please give me the advice I need to help me to do this because I'm destroying them. He looks at him and says, my friend, I don't understand, but I'm coming back through this village in a months time and I want you to try and hold on to yourself as much as you can and I will come back able to start the conversation and then that month Ghandi went and he gave up sugar for a month and then he came down and sat with the young man and he said, now, I think I'm ready to start to have this dialogue with you and I think that's an introduction to say that my experience with all of those things, so often in life we experience it through the book, here is the book on Rolfing(?). I love reading, if I could turn this house into a book case I would, luckily other parts of my family don't agree with it, so I get restricted here, but all I'm trying to say here, what's important about this kind of coaching, don't experience it theoretically, experience is somatically and intellectually, sorry, somatically and emotionally and then saying. Now what sense do I make of this and I think what we're trying to do with our coaching as well is often, if I come up with a smart concept which I do as a strategist, is a

picture, you're blown away, wow, but I fog sculpted with you, I created an illusion and here's a model and we can integrate these and here's how to do it and you feel good and I feel good and my wallet is thicker because of that. I think coaching is actually about saying, let's actually get you to actually focus on what you're actually experiencing and here is an experience I'd like you to go on, which is why we do so much somatic work, even though we aren't sitting there massaging people or actually saying, let's do this, we're saying please go and speak to or please go and do this and we integrate those practices, we are saying, until my body can shift, until my body can actually hold itself in a different way, I cannot begin to see those alternatives in that picture, I cannot begin to see it, so this kind of coaching doesn't come at my head and then go into my body, it actually says come at it both ways. Sure if I'm sitting down with a highly educated chief executive I'm not going to sit and say the first thing I'd like you to go on meditation retreat, 'cause I ain't got no job, but during the course of that coaching, if I'm coaching for a year, sooner or later somewhere along the line, something is going to happen, it may not be that, there are a million things he could do, I'm actually going to invite him in to taking the risk of actually saying, maybe if I went to a place where I could engage this in a different way and thought about it and actually allowed me to be aware of it, I could actually come up with different ways of seeing this and being this. So I'm not answering your question directly, but I think the more important experience is what this has taught me is, A, are the coaches that were training actually when we talking Rolfing(?) or we talk meditation or we talk the Jesuit practice or we talk (tongilin?), my invitation to all of the classes that I teach is get your butt out of here and go and do it and then come back and let's have a talk about how your body was and now how you think about this, don't go and read a book on meditation and say to me, I think the practice is (?) and when I'm working with coaches as well, I'll often challenge them to say, that's a great idea, that is fantastic, how is that showing up and how are you feeling though and most of us live our lives here, that's where we live, above the shoulders, we don't actually, and I'm not aware, that is one of the greatest gifts that integral coaching has given me is an awareness, I'm 6 foot 5, there is a lot of me hanging around, but now at least I know what the heck is going on lower down in the body and opening my awareness and constantly becoming a student of the body has been the greatest gift of coaching for me and I think that that's the greatest thing we can leave for people. Not only are you a student of your mind, so you understand your mind better, you're a student of your personality, you understand meaning better, but you become a student and fascinated with your body, how is that good, where did I feel that, anything uncomfortable, I need to eat, was that sane, I wonder what that means and I'm trying to be very graphic and say, we boil all of that down, if you teach at university, you teach it in a different way, but the core of what you're trying to say is, can we actually access a coachee and allow them to access their lives, everywhere but here and even here in their SOI, can they actually start to see it in a different way, so that isn't a painting or a picture on the wall, it's what, it's a graphical representation of somebody's emotions, what emotions are you sensing in the picture, now I'm talking about the picture in a fundamentally different way, but that is what the picture is, he drew that picture, he didn't only say, here is a picture of a light house, he was actually expressing his emotions and he was actually expressing his philosophy on what a lighthouse is for him. I can access that if I'm tuned in.

MARK HARTNADY: That's great. What we haven't covered so far and while I'm thinking of it, the last question I'll leave you with is just to talk about anything that you think is pertinent that I haven't covered or anything that is on your mind at the moment, your recent thoughts that you've had about integral coaching, we'll leave that for the end. Could you talk

about your experience with the various coaching courses that are offered, there is coaching to excellence, associate coaching course which I don't know is available anymore and then PCC.

CRAIG O'FLAGHERTY: It runs every year.

MARK HARTNADY: Maybe its in the States that its not running anymore.

CRAIG O'FLAGHERTY: Its never run in the states. Let me tell you the history of that. I came, went to CT(?), did PCC and then came back here and said James, I'd love to run it back here and he said, you're not ready yet.

MARK HARTNADY: PCC?

CRAIG O'FLAGHERTY: Ja, and I said OK and I think that tradition goes way back to whether you talk about priesthoods or guilds of artists, guilds of swordsmen etc, what they would do, is sure you can hold a sword and do it, but now you need a mentor, you need a guide and you need experience and that was a 5 year journey before he said I'm ready and that was quite hard to swallow and take, but what he did do is to say, maybe you should run a shorter course, run one for 6 months, so I took the very first course they ever ran, before they ran the year long course which evolved into PCC and we brought it back here and we re designed it radically and that's what became ACC(?), but now I would never teach this course without it because what people learn on ACC, they learn the basics of the models and the head stuff, so that by the time they get onto PCC, they are open to all of the others.

MARK HARTNADY: Spirituality and somatics.

CRAIG O'FLAGHERTY: Instead of it happening kaboom on the last day of the course, right at the end, they are actually living into it and I think, I've often had this dialogue and debate with James, I think something is missing, because take people through the step ladder of what they learn or down the step ladder of what they learn.

MARK HARTNADY: Did that not happen though in the PCC, I mean PCC is long, its 12 months.

CRAIG O'FLAGHERTY: 12 months. So people, by the end of it, they've done 18 months of training. To me, this is one of the things that gets slammed about coaching in this country and truthfully so, you can do a weekend course, put up a shingle, print a business card and you're a certified coach. Well, you may be "certified" or not, but there is no certification - big problem for me. What have you done to unlearn all of the things you have, but I'm an experienced manager, I've lived life, I've done a whole lot of things. What have you done to unlearn those things, what have you done to actually, really, humbly put that stuff aside and say, there is so much stuff I haven't learnt and then integrate that stuff that you have learnt back into it and why don't you go on an experience is that about doing it yourself first before trying to do it with somebody else and that is why I think that 18 months of learning is fair to certify as a coach. There is no other training in this country that does it as long, I mean the longest other course there is, is a yearlong course. I think it's vital, it's necessary.

MARK HARTNADY: When I Googled IC the other day, on *South African Google*, one of the first links was a company called IntegralCoaching.co.za and they seem to offer

certifications from the Canadian school of integral coaching. Is there an overlap or is that, do they just use some of the terminology, do you know any?

CRAIG O'FLAGHERTY: The overlap is that there was a very, when I came into New Ventures west, there were two James and Sarita, there was a third person, if you go and look at integral coaching, sorry, its not integral coaching any more, its called, if you follow that site to Canada and you go and look on that site, the two women that studied and started integral coaching in Canada were James' students and one of them, Laura Hunt worked with James and then they went to Canada and they broke away and Edith Seabers who runs integral coaching South Africa did the PCC here and then she connected up with Helen and the other woman and she kind of works with them.

MARK HARTNADY: OK, so they ...

CRAIG O'FLAGHERTY: So the roots of the coaching are very similar, in fact I would say, not that they're identical cause they've evolved, but James is the source of that as well.

MARK HARTNADY: Is the PCC course that they offer the same as the PCC course that New Ventures west offers?

CRAIG O'FLAGHERTY: I don't know what the content looks like, but its of the same thing, you do a year long coaching course, its certified through the international coach federation, its broken into 4 modules etc etc, but what the content looks like now, 7-8 years later, ja...

MARK HARTNADY: But nevertheless, to be certified as an integral coach through their program or through (?) coaching is similar.

CRAIG O'FLAGHERTY: Its similar, but different, I mean they do a lot of work with Ken Wilbur, they connected into Ken Wilbur whereas James' connections are much broader, its not Ken Wilbur is the be all and end all, its Ken Wilbur plus and I think that's the philosophy, its not, we've arrived, I think integral coaches you don't say I found my home, this is my home, have stopped learning, integral coaching says I understand what I know now, what else could I look for, what else is out there, what is new, what haven't I seen.

MARK HARTNADY: Its ongoing.

CRAIG O'FLAGHERTY: I think.

MARK HARTNADY: OK great. Do you want to look at this list of authors and tell me if you've read any of their works and if you have, what influence they have had on your style of coaching or, I've got these from what was recalled with that interview.

CRAIG O'FLAGHERTY: They are all there. Let me give you my view. Do you want two sentences on each?

MARK HARTNADY: I'd like to know which of these authors or which of these books have influenced you the most or has influenced integral coaching the most.

CRAIG O'FLAGHERTY: I think Martin Heidegger, fundamental because I think that's where (?) way of being, that's where the way of being came from, he was the first person to talk about and he was, I think (?) as a fundamental part of the work that we do, so what is the persons way of being in the world and what is the way of being mean(?), how can you be in the world, rather than just, what his thinking was challenging at that time was the very intellectual way, if I think, therefore I am, this was saying, being is far more, so I think his work has and always will be, if there is a tap root to this work, Martin Heidegger work is fundamental to this work. I think if I look down that list, I think, Maturana and Varela, I think, very important, I think their very important contribution was because we live in a body, perhaps we need to start realizing as coaches and as clients, coachees that are working with us, that until I start actually understanding and being an explorer into my body and how, when certain people are saying certain things or doing certain things, that generates certain reactions and responses that I'm not going to change, also the other illusion that we have as human beings is that the first thing that happens is the thought and then that decides on action, but what science says, I'm sorry, it doesn't happen that way. My body experiences a sensation and the first thing my body experiences is sensations, that then triggers the chain of electro magnetic force etc and that stimulates the thought, so until I actually realize that my brain is actually, we think that the brain is the CPU, it doesn't work like that, we are not a computer, this is actually our brain and this may be helping to interpret by putting perspective on it, and remembering things and categorizing it, but actually its, some people aren't even aware of their bodies, so the brain happens, what made you feel that way about the movie? I don't know, but if you did a body scanning exercise during the movie, you might actually start picking up where in your body you felt it and realize that I started to feel this very cold, uncomfortable feeling right in the pit of my stomach and that started to actually experience in waves and then I started to think these thoughts, but then I'm aware of where it came from, so what do you think that is saying? Its in the core of you. What is the core of you different to you feeling it in your fingers? We don't have time to go into that, but exploring that, what does that actually mean? Because the body is experiencing it in different ways, so understand that. That is why I think their work is profound. I think there is work here that is, work that I think is really important, (?) Becker, death, I think the work that he was doing which was so powerful is really saying that the biggest fundamental fear that we live with as human beings is our fear of no longer existing and that is what drives all of what we do, from the time that we become aware that we are growing, evolving and therefore starting to age, I think the biggest fear that we live with, the fundamental core concern that is at the basis of everything that happens is death. In fact we also run a series of electives after the PCC, for 3 years you can continue to study. We just finished it this year, in other words, there were about 6 other modules and death was one of the modules we did which is, lets explore your relationship to death and dying and what it actually means and how we as human beings are very quick to escape and death could be losing something, death could be I didn't get promoted, I lost that job, death, its....

MARK HARTNADY: Not just death in relationships, but death in many ...

CRAIG O'FLAGHERTY: How do we integrate death and dying and ending into life I think is an important part of the coaching work that we do. Who else would I say? Ja, I think the, obviously Jurgen Habermas, but we've talked enough about him, but the other work is the work of Almaas(?) , Hameed Ali is his other name and I think, Almaas is his pen name, Hameed Ali is his real name, but I think that the work that he does is really powerful, he's written countless books, the inner journey home, in other words coming home to self, coming

home to the inward you and I mean the, ja, he has a movement in the, its across Europe, the US, Australia, its not here, called Ridwaan(?) and Ridwaan is a very powerful collection of people and what you do is, you get together as groups of people and it's a lot of dialogue and reflection, there are beautiful techniques that they use that we use on some of our more advanced courses where I sit with you for an hour and today we're going to talk about consistency, what is consistency and I'll sit in front of you and say, what is consistency mean to you and then you'll talk and then I'll ask you again, what does consistency mean to you and you'll talk, after the first 10 minutes you've burnt off all the intellectual stuff and then you start getting down into the real stuff and that is the kind of process that Hameed Ali has brought to our coaching work as well. So I might sit in front of you as a coach and I might ask you the same question three times because I'm asking you to think about it, what does it mean, what does it mean? And you're kind of going to say, I'm trusting my coach, I'm not going to do it in the first session, but OK, what I really think what I really mean is, and now that you've asked that question again, that is where that kind of work comes out, its so powerful an addition to the work that we do. That is the spirit of this, each of these wonderful human beings has had an inflection, a process, a thought, an idea, a concept and I think the spirit of integral coaching says, which is why we say to people, now is the time to start reading, going to see movies, etc, because what a coach does when they're trained in this is, I could use that with my coachee, well that's a great question, Gee I could ask them to see this movie, this is a fantastic paragraph that I could give my client who is struggling with responsibility, I could just give them that and ask them to think about it, that is what it starts to do, it starts to widen your sensitivity and awareness to the world, what is going on, what did I see, what can I get out of it, it's a lousy movie, what was the one good thing in the movie and that's what we're trying to do as integral coaches is trying to encourage people to see beyond. My impression of this person is, I understand that, now look beyond USOI(?), what does the person really mean to you? I haven't thought about it in that way. Well then go away and think about it in that way. If we can leave that person with that gift that nothing ever happens to them in their lives without them saying, OK, that is my standard view, that is my schtick(?), now I wonder what I'm missing. That is what actually self generation and self correction are about. All right, I really didn't like him at dinner, now can I settle in to myself, can I relax and ask myself, what am I not seeing about this person, what am I not seeing about this situation, what am I not seeing about him cutting me off at the corner, what am I missing? I think that is the gift we are leaving people with integral coaching. Far more self reflective, far more self aware, so that I can become self correcting.

MARK HARTNADY: Excellent, thank you so much. Is there anything, I'd like to know what is in your mind presently, you've been a coach for quite some time, we're always evolving, always changing, always thinking of new things, is there anything that has recently come into your way of being as it were that is perhaps something that you feel was missing in coaching or that has been on your mind recently, or on your body should I say?

CRAIG O'FLAGHERTY: There are two things that I've been exploring, so let me give you two, I'll give you the one practical example, photography. For my 50th birthday last year my wife gave me a camera and two lenses, she knows I've always wanted to do this, so I've gone on some photographic courses and I went up to Namibia and we spent 10 days in the desert taking photos of sand and stuff like that, but I think what its really helped me to see is that I'm seeing the world in a fundamentally different way, not like everything is a picture, but what I'm starting to recognize is when we take photographs, what we see sometimes and its often what we don't see that we see in the picture afterwards which is oh my goodness, so what I'm

finding is that photography is a really helpful of saying, when I meet a person and see a situation, what if I metaphorically pulled the lens backwards, what if I opened aperture, in other words I ask more questions, what if I deepened the focus, so photography for me and there are many people who write about photography, Susan Zontag(?) was a famous photographer in the 1950's and she's written some beautiful stuff on what is the world missing that it doesn't see, so that is an area that is starting and I'm trying to find ways of bringing photography in as distinction, bringing the work of photographers in, bringing pictures in because we're a very visual being, we're pliant, so how does deepening our visual appreciation for what's going because remember the sensation I first see is the picture and then I have the thought and the feeling, so if I could change my way of seeing, which photography teaches you, maybe I start to see the world in a different way, so that's what's hot on the press for me.

[Pleasantries and end of interview]

7.6. Appendix 5 – Transcript – Interview with James Flaherty, 31 October 2011

[Introductions and description of the study]

MARK HARTNADY: Could you elaborate on the origins of IC?

JAMES FLAHERTY: *[Inaudible]*...bringing together of three things – one is the human potential movement, that to a large extent happened out here in California where I am - coming from the Esalen Institute and all the people that came to get their [unclear - light?] Fritz Pearls, Ida Rolf, Maslow, and the rest. And Werner Erhard of est took that and put it together in a very powerful way which in the end was a very popular programme. So that stream, and then Fernando Flores brought something which was always missing in the HPM which was grounding beyond the excitement of having new experiences. Grounding in really a rigorous, Western philosophical roots. And the third thing that blended in is Eastern hemisphere spirituality. There is spirituality from the West but when Zen came to the states in the 70's and when the Tibetans got thrown out of their country and started being available to teachers to the West, that also got blended into our work. So, I know I'm answering your question about the flow of coaching conversations. I'm saying this because what happened in the HPM as I saw it, the part that got left out all the time was relationship and the instructor or therapist. I don't know if you've ever looked at Fritz Pearls interactions with people. He was incredibly fierce and forceful and left out relationships, and so did Werner. Werner's work left out relationship and just went for what he thought was important to go for and trained all his leaders to do the same thing. So when we started we wanted to leave people intact, whole, in a stronger relationship with themselves and the people around them. *[Inaudible]* condition. So we wanted to start out with relationship which to me always seemed the like to background to all interactions. Not just that I know you or we're interested in the same things but a deeper bed^[inaudible] of relationships that we share as human beings. And that, if we start from there, it does away with some of the innate power-difference that happens in the coaching relationship. It makes it easier for the coach and client to be on the same team without resistance or friction.

MARK HARTNADY: Okay, just a question there – when you say “relationship” was left out which is something that you wanted to bring, was that with NVW or earlier?

JAMES FLAHERTY: Yes, NVW – this was the first chance I had to do it my way. Previous to that I had to take up what other people were doing. I did lead workshops in Werner’s organisation and I did lead workshops in Fernando Flores’ organisation and I could be a little bit myself but mostly I had to do it the way they wanted me to do it. So when we started NWV, it was the first chance to explore how I wanted to do it, how we wanted to do it, what seems “more true?”

MARK HARTNADY: Can you remember in which year est was founded?

JAMES FLAHERTY: Yes. It was 40 years ago. 1971. But I got there in 1974.

MARK HARTNADY: During this period was the founding of Hermetnet, could you tell me about that?

JAMES FLAHERTY: I don’t know all the details but my understanding was that Fernando Flores was going to Berkley and Werner had a foundation called the est Foundation and some money from the foundation went to Fernando. He was doing some very interesting work that got the attention of people in Werner’s organisation around management. So, Werner first brought Fernando in to work with Werner’s first personal staff. He had a staff of 20 or so people that worked in his own office and that’s when I first heard of Fernando because Stacy was on Werner’s staff and she told me about this guy talking in this thick Spanish accent, and that he would speak with such forcefulness that everyone in the front row got his spit all on them. So Werner was smart enough to see the limits of what he was doing at est. At est he was pushing to the edge of what human beings could tolerate. So people would get physically sick in his training – people would have bad experiences later, so he wanted to go in a different direction, one that was more mainstreamed and Fernando had that. So they founded this partnership where Fernando would provide the content and the product they made available was called “communication for action” workshop and it was offered through the network of est’s centres throughout the country. I don’t think they ever went internationally. Just in the states in 18 or 20 different places.

MARK HARTNADY: And who was that targeted at?

JAMES FLAHERTY: It was marketed at people who went to the est training. Part of how est worked was that once people were in the training, near the end of the training they were heavily marketed to coming to the post-training. At the post-training people enrolled into a series of graduate seminars. And the graduate seminars did have some good content but in terms of business, they were the platform for announcing lots of other programmes. And that’s where the CFA workshop was introduced into graduate seminars. Werner also did a heavy push by having his trainers take it. I think he and Fernando did a collection of workshops together to drum up interest. You didn’t have to be an est graduate to do it, anyone could do it but that was the main audience to whom it was marketed.

00:10

MARK HARTNADY: And this was done through est?

JAMES FLAHERTY: Yes. Hermetet was a part of est.

MARK HARTNADY: Okay, the other thing I've determined through a look at the history is the founding of Breakthrough Learning. Could you elaborate on that?

[Some confusion over terminology of Breakthrough Learning. JAMES FLAHERTY mentions not important however he was thinking of Breakthrough Foundation started by Erhard which is not relevant]

JAMES FLAHERTY: Breakthrough Foundation – so what happened was, when Fernando and Werner split, Hermetet went away. I had to find work very quickly so I tried a few things on my own that didn't go anywhere. I got hired at a consulting company [inaudible]. And when I was working there I got approached by John Hanley who had a company called LifeSpring which was another human potential programme similar to Werner's. Hanley, my partner at the time Keith Bailey, and I started a company called Breakthrough Learning to take what I had learned through to a workshop [inaudible] through his [inaudible] my association with Fernando [inaudible]. So I did that for about a year.

MARK HARTNADY: What year was that?

JAMES FLAHERTY: I think that was 1985/1986. As soon as [] are working in Breakthrough Learning [inaudible] I started New Ventures West. [Inaudible]

MARK HARTNADY: So that was started by John, Keith and yourself.

JAMES FLAHERTY: Yes, but Keith didn't stay there that long. [Inaudible] after 5 or 6 months and then he left. Really, John was running his own company and I had workshops throughout the states and John had his centre in New York, or Washington or wherever it was, but [inaudible] after a while.

MARK HARTNADY: So, as I understand it, Breakthrough Learning was a consulting company, so it was quite business oriented, business focussed, and John Hanley, was offering products that were focussed on workplace effectiveness.

JAMES FLAHERTY: Yeah, so let me clarify this bit – so John ran LifeSpring and LifeSpring was a company that engaged in weekend workshops. He had basic classes on weekends and advanced classes were something like 5 days in a row, and he really had a way of doing it. So Breakthrough Learning – we wanted to introduce through his [inaudible] and then have people who attended it, bring the learning from these classes to their companies. [Inaudible]. So basically I spent my time on these weekend workshops at Breakthrough Learning. It was called [inaudible] – can't remember the name.

[MARK HARTNADY calls JAMES FLAHERTY back on a fixed line]

MARK HARTNADY: So just going through time, Breakthrough Learning was 1985/1986 you mentioned. And how long had John Hanley been with Lifespring?

JAMES FLAHERTY: I don't know the history of Lifespring that well but probably I'd say 10 years.

MARK HARTNADY: So what was the impetus for you to start Breakthrough learning and not to just join Lifespring?

JAMES FLAHERTY: Well because I didn't want to work for John Hanley. He was an oppressive, dominating guy. Plus he didn't have any ideas. He was very good at business – at running his centres but he wasn't an ideas person. He sold Human Potential the way people would sell anything. He wasn't interested in the product so much. He was just interested in how he could get people to sign up.

MARK HARTNADY: So back to the flow of coaching – you were talking about three things that define IC. You started off by mentioning the Human Potential Movement. You mentioned est's influence, Flores' grounded influence and then spirituality.

JAMES FLAHERTY: Yeah, I think they are big enough umbrellas for all the rest of the stuff. So there's lots of philosophical roots that started out with my encounters with Flores. I had read philosophy in college and so on, but when I met Flores he introduced me to Heidegger (I didn't know who that was). So much of Heidegger's work was not really translated into English until 1970's so it was just starting to get around.

00:20

MARK HARTNADY: Is it safe to assume then, that pre-Flores, your philosophical background was pre-20th century?

JAMES FLAHERTY: Let's see – I think that's right. I started doing est training in 1974 and I got seriously involved from about 1975-1981 or so. And the roots there were certainly not philosophical; they were the Human Potential Movement. In a way this was anti-intellectual. Things came out of your head, out of your feelings – get into your feelings and that stuff.

MARK HARTNADY: And when did you become a leader at est?

JAMES FLAHERTY: I was never a trainer (the 2 weekend course). But there were guest seminar trainers which I did. And there were graduate seminars – I did that. When Werner was looking for leaders, for his training, he saw that Fernando was a very smart person and saw that Werner had trained scores of people to lead graduate seminars – so he had a body of people who were familiar with the est folks and could get hold of them to teach stuff. With very few exceptions, the leaders of Fernando's classes were former seminar leaders from est. And then he converted us from the "religion" of Werner to the "religion" of Fernando.

MARK HARTNADY: Interesting – quite an influential character it would seem.

JAMES FLAHERTY: Yeah, well Fernando is a gigantic personality with a huge intellect. I'll give you 3 examples. Firstly, he claims to read hundreds of books a year (+-1500), but then he remembers them. He also remembers everything you every say or do. [Anecdotal recollection of examples of Fernando's ability to recall events]. But the third thing is that he listens with a depth and sophistication that almost nobody else has (of being able to understand the way our thinking worked and where it fell short – or where he didn't understand where our thinking was coming from).

MARK HARTNADY: Would you say he was a good listener?

JAMES FLAHERTY: Whenever he wanted to be, he could be a fabulous listener. He could be deeply quiet and receptive, and “get it”.

MARK HARTNADY: And were there instances where he would listen less well if he perhaps had an agenda.

JAMES FLAHERTY: Yeah, but it would be a mistake to get into the power dynamic that I had with him at that time. Any kind of dispute I had with him, he would use his position of power and the force of his personality and intellect. Fernando’s way of working with people – that he did call coaching (that’s where I first heard coaching being talked about) – was that there had to be a “breakdown” for coaching to happen which he got from Heidegger. Heidegger says that we just live moment to moment in a world where we expect everything to work and flow easily and naturally. And if things are flowing along we’re not thinking about anything we’re just dealing with each situation as it happens [example of dialling a phone without thinking or awareness about it]. In philosophy that’s called the “transparency of the world”. But if you start pressing the phone but one of the keys was sticking you’d suddenly notice – so that’s a breakdown or an interruption. So Fernando’s mandate was making sure the person has a biiiig breakdown, which would get people to think about how something works or what was wrong.

MARK HARTNADY: So the intent of the breakdown, is it just to have this “aha” moment, or is there something else there?

JAMES FLAHERTY: I think it was that without a breakdown, no one is paying attention. We’re just automatically passing through life. [Example given of driving through Nevada not knowing where you are]. And that’s often how we are – we get a flat tyre and suddenly we wake up.

00:30

MARK HARTNADY: But surely going through life like that is analogous to living like an infant? If we are supposed to live a life of constant awareness then isn’t there a practical element missing? You gave the example of the phone and only noticing it’s there when something goes wrong – but if we are to live our lives like continuously looking for understanding of how everything works surely we’ll never get anything done?

JAMES FLAHERTY: Yeah, that’s the point. [Inaudible] and the language practices that we’re in, that we can deal with the world. But we could also pretty quickly imagine being in a different world where we couldn’t cope – like take you and me and drop us in the middle of the Inuits and we’d be clueless. But drop us in the middle of CPT or NYC and we’re fine. But we don’t have very many new possibilities, and here’s [Heidegger’s] point – until we have that breakdown. [Example given of a subway strike, and then realising really how far away from work you live, etc]

MARK HARTNADY: Coming back to the flow of coaching, there is a moment where your client is invited to a “new narrative” and as a coach you are there to help provide a distinction to help the client realise what may be blocking them from achieving their goals. Does that

“new narrative” model come from Flores’ influence and Heidegger’s breakdown being required, albeit at a more practical level?

JAMES FLAHERTY: Yes – in the flow of coaching there’s 2 narratives. The first is recognising the current narrative, which is our best effort to explain the situation to the client as how they are interpreting the world at the moment so that the issue they have is *there*. Our central claim is that the situations we are in are interpretations of what’s really going on – the interpretation is much more than just an idea or belief – it’s a way of living, it’s a series of relationships that surrounds me, it’s the way my body moves, it’s the equipment I have around me, all that helps that current narrative to keep going. That’s right, so that’s the world, the *transparent world* that I’m in. Where I am just doing what makes sense for me to do in that world and doing those cumbersome things keeps getting me into the same trouble over and over and I can’t see why. So the “new narrative” that we invite people into is meant to be an interruption to the current one.

MARK HARTNADY: Could you explain a bit the origins of the various models used in the flow of coaching? The five elements for example.

JAMES FLAHERTY: So, the 5 elements is immediate concerns, commitments, future possibility, mood and personal & cultural history. The first three are Heidegger, and come from what his most famous book are all about – *Being and Time* is about those three openings in time. Immediate concerns are about now, commitments are about the past, and then future possibilities are obviously in the future. So Heidegger’s ways of describing people is that we are critters, we are beings that are interested in and in a way existing in all three of those relationships of time. So those look like on the surface, “fact-finding questions” but they’re not that – they’re questions that are meant to reveal the kind of beings that we are currently enacting.

JAMES FLAHERTY: And then mood is also Heidegger – *Being and Time* – Mood being the emotional atmosphere that we’re in that has a great deal to do with what we feel is possible – not so much what we think is possible.

JAMES FLAHERTY: Robert Solomon did a lot of work with mood as well – and a lot of the content of what we talked about is from Solomon because Heidegger didn’t have a big taxonomy of different kinds of moods. He had a few – he talked about anxiety and dread but he wasn’t so hot on them like joy or enthusiasm. He lived in the Black Forest – no joy there.

MARK HARTNADY: So the purpose of the 5 elements model is to help do an assessment as I understand the client. So by doing that assessment, you’re asking questions to your client to elicit from them, what are their immediate concerns, what are their past commitments, etc. And from that you’re building a model of the client so as to know how best to work with them. Is that correct?

JAMES FLAHERTY: Yeah, but I would say that more accurately is that what we’re doing as coaches is that we’re listening for those things. Because there’s no way that any person could answer those questions. So, sometimes it’s obvious what the immediate concerns are (e.g. I haven’t eaten in 3 hours). But sometimes we don’t even know we have an immediate concern – it’s too much in the background. And certainly no one can let go of their commitments. But as we hear people talk about their lives sometimes we’ll explicitly hear people say that “I’m

committed to my education, or to my family or to having adventures”. Yes, but everyone also has contradictory commitments [gives example of wanting to learn as much as possible but then doing a programme in as short as time possible].

00:40

So we have contradictory commitments. Almost nobody will tell you “I’m totally committed to my family but I’m also committed to getting away from them sometimes.” So as coaches we have to listen to those criteria more than only have that be a question that we ask.

MARK HARTNADY: The other model you use is the “Four Human Domains” which I believe takes its influence from Ken Wilbur’s AQAL model however with a practical element that excludes spiral dynamics or the Kosmos as he refers to it?

JAMES FLAHERTY: Yeah, I think it’s true, that there’s a model we were already using in our 2-day introductory class. We divided the world into 3 elements, the “I”, “we” and “it” – the world of me, the social world and the world of stuff. And that’s from Jürgen Habermas (German political thinker). So I got “I/we/it” from him – that same place that Wilbur got it. So what he did was, when he was writing *Sex, Ecology and Spirituality*, he divided the “it” into 2 parts (and that’s how he got four).

JAMES FLAHERTY: How he says it is that one is singular and one is plural. And so for a number of years we called that model the four quadrants but it did get messed up with what Ken was doing and what we were doing which was very different.

MARK HARTNADY: Could you give me the approximate time you started using that model?

JAMES FLAHERTY: I don’t know that. I think we had that model in the first PCC. The first class we had was in 1998. And it graduated/finished in 1999. We had what were called the quadrants in that class.

MARK HARTNADY: And then when was it “updated”?

JAMES FLAHERTY: That’s a question that you could email to Stacy. But I’d say about 5 years ago (we started calling it the “domains” and not the quadrants). But it always had different content to Ken’s. Have you read his stuff?

MARK HARTNADY: I’ve read a bit of his book called *Integral Psychology* but he goes into extreme detail.

MARK HARTNADY: Can we talk about the flow of conversations and where the ideas came from?

JAMES FLAHERTY: That’s Flores. Certainly the conversation for action and possibility and that’s what he taught in the workshop I was telling you about – “communication for action”. But the weakness was that he never did have a conversation for relationship. Where did that come from? I think that happened when I was out of the Flores world. So, when I was getting trained to lead Fernando’s workshop, Werner as always had one of his est trainers working in

Fernando's organisation and when I was there the trainer was a man called "Ken Andenter". So Ken had his own theories about communication and I think that's where I got conversation for relationship.

MARK HARTNADY: This was working in Herment?

JAMES FLAHERTY: Working in Herment although he was an est trainer. He was working at Herment over a rotation of a year or fifteen months. So I think that I put together the constellation of the three conversations – I don't remember hearing it from anyone else. It seems odd because it just seems so obvious.

MARK HARTNADY: What influence did Ken Andenter have exactly?

JAMES FLAHERTY: You mean how did he influence me?

MARK HARTNADY: Yes

JAMES FLAHERTY: Yeah, I think it was the background for relationship is what Ken brought. The background of relatedness and relationship. And then I started studying what we would be a concise form of those 3 different kinds of conversations.

00:50

MARK HARTNADY: Were there any books or literature that reinforced your thinking about the importance of establishing relationships and building trust before continuing [a coaching conversation]?

JAMES FLAHERTY: Yeah, I would say the Humanistic Psychology books like Carl Rogers – *Being a Person*. So – being able to respect the client as a person not just to someone who has resistance to [transference] but as a human being. Another influential book was *I and thou* by Martin Buber.

MARK HARTNADY: Can we cover the 6 stream in our last fifteen minutes?

JAMES FLAHERTY: Yeah the six streams are simple; they were made up by me. I wanted to give enough structure to beginner coaches so that they could focus in on their assessment instead of just saying "what is this person competent in?" So you see some Integral Psychology in there. And Ken has way over 100 streams of competence. It's crazy. Maybe he can keep 100 in mind, but most people cannot. So every business has its own competency models of what the skills leader need to have. So that came out of years of experience of what I thought would be sufficient for someone to be a competent person – having a life where they could be effective and fulfilled. If they attended these six streams – that seems sufficient.

MARK HARTNADY: Can I interject quickly? Just looking at these categories, cognitive, emotional, I've seen these before used to describe various types of intelligence. Would you say the thinking here is similar?

JAMES FLAHERTY: Yes, I'd say the thinking is similar. And sometimes when we teach the class we'll say that. People are most familiar with cognitive intelligence, and then a lot of

work was done in the nineties around emotional intelligence, and I think its similar with relational, spiritual and somatic and so on.

MARK HARTNADY: So the purpose is to give structure to beginner coaches that let's them focus in on the assessment of their client.

JAMES FLAHERTY: Yeah, and then also to have a palette from which to design practices. So, people need not only to have insights but that they engage in action that starts to shift their body, shift their nervous system, and the content area for practices is the six streams.

MARK HARTNADY: [Clarifies understanding – the focus is on what the client is *not* competent in]

JAMES FLAHERTY: So you might know that there's a huge movement in psychology and business training for people to build on their strengths. Which I think is fine, if you want a person to be really narrow. But I think if a person is going to be able to move in many different directions, be able to deal with the unexpected, be resilient, be creative, they have to be much more developed than 3 or 4 strengths that count for everything (e.g. making big biceps even bigger will only allow someone to contract their arm once – to release it again we need triceps, etc). I understand it and to me, it seems more about convenience and making sure that nobody gets too uncomfortable but it also puts too much of a fence around our development.

MARK HARTNADY: Would you not say it's also treating people as machines? Machines are really good at being specialised.

JAMES FLAHERTY: Yeah, you're a race car driver, don't try and be a boat. There are 2 things to consider: 1 is "what is the competence to be build?" and "what's getting in the way?" So, to develop emotional intelligence, for most people that means developing somatic intelligence. Feelings show up as feelings in the body.

01:00

JAMES FLAHERTY: So, what's interfering, and is the person sufficiently present. You and I both know people who could be in the midst of a huge temper tantrum and we point out "Fred aren't you a little angry today?" – "No, I'm not angry". Fred isn't present enough to feel what he's feeling. All Jane Austin novels are full of people in love and they don't even know it – they're not present enough to notice. So that's the baseline.

MARK HARTNADY: You started off mentioning that these models come from you, but what were your influences?

JAMES FLAHERTY: I'd been hired by PriceWaterHouse Coopers to do a competency model for their leaders. And I've read untold numbers of leadership books which prescribe "the ten or five or twenty or some list of competencies" – "all leaders need this or that".

MARK HARTNADY: So it was through that process that you realised the need to develop a model that is holistic and integrating.

MARK HARTNADY: What was the influence though? Why emotional, why relational, etc? I know your experience with Rolfing has had an influence on the somatic stream for example.

JAMES FLAHERTY: Yeah, but somatic is also about being present. And it's the one that gets left out of our education. We don't have any classes anywhere about being present. We can't focus and get our work done if we're not present.

JAMES FLAHERTY: So, there wasn't a lot to this. Once I'd made up my mind to do this it was ten minutes of thinking.

MARK HARTNADY: So could I write in my report then, is that the reason it stayed like this is because of its effectiveness?

JAMES FLAHERTY: That's right – it's rich enough. I'm sure Janine has given you the different definitions of the different streams – there are various parts to each so it's pretty rich. And enough dimensions to support the creativity of the coach and being able to respond to individual clients.

MARK HARTNADY: Have you ever trained or coached a coach that was desperately lacking in creativity?

JAMES FLAHERTY: Yes. Desperately lacking, yes.

MARK HARTNADY: So what is the recourse? How do you help someone like that?

JAMES FLAHERTY: Yeah. So the starting place with creativity is that we are naturally creative beings. So, it would be a rare child, who is 5 years old, who in their playground, and the teacher says "here's 20 colours, draw something" and the child says "I'm blocked." That doesn't happen. So, it's a matter of – for the most part – undoing the dams in the river of the person's creativity. Which, for many people, is their harsh inner-critic or "super ego" (Freud).

MARK HARTNADY: And finally, the ten ways. Could that be explained in the time we have left?

JAMES FLAHERTY: A lot of these models happened because there were things that I was doing, automatically, in my own mind, that I couldn't just ask people to do. So, for years, from the beginning of the PCC, I would say to people, when you're working with a client, work at one level below where they are at in their skills, competency, development – to open up that new territory for them to move into. And everybody would nod their heads and say "oh that sounds good". And then after some period of years, someone said "what are you talking about – these different levels?" which was a good question. So then I started thinking about the different levels [of development] of people that I've worked with, met, read about, and that's the origin of the 10 ways. The 10 ways has been refined over a period of time.

MARK HARTNADY: Is the 10 ways an evolution of the three goals of coaching – self-correction, self-generation and long-term excellence?

JAMES FLAHERTY: I think I could tie it to that but it was separate to that. It came from asking the question “how do we know how to work with someone?” Because the complexity, the amount, the intensity of the coaching programme has to meet with where the client is so we have to have a good feeling for where they are – where the person is. And then if it’s going to be a developmental model, we have to have some idea of sequence.

1:10

MARK HARTNADY: Now, what if a coach themselves is not at the same level as their client?

JAMES FLAHERTY: Yeah, so we caution our students not to coach someone beyond their own developmental level.

MARK HARTNADY: So would you then make them redo the PCC, or put them into another programme?

JAMES FLAHERTY: The good news is that most coaches-in-training are developed enough so we don’t really have to worry about it. There are some startling studies – one I read in a book called *Power versus Force* – that claims that 85% of the world’s population cannot see the world through someone else’s eyes. They cannot see someone else’s interpretation as equally valid as their own. So in our world, of the 10 ways, that means that 85% of the world is not in the level called “conversations”. But every now and then, for example where I live in San Francisco, a Tibetan monk may walk in who has had 10 significant enlightenment experiences, and says “okay, coooaach me.”

[Pleasantries & thanks - End of part 1]

[Part 2]

MARK HARTNADY: Carrying on from where we left off – we were talking about the ten ways. You explained to me that different people are at different stages of development or “ways of being” in their life and it came from you asking the question “how do we know how to work with someone?” and that the complexity and intensity of the programme needs to meet with where the client is at, and then there is a sequence as it is a developmental model. What I am interested in understanding further, is why *those* specific ways? Why balance, why conversation, why in the order that they are in? Is that simply logic, or is there something else influencing that?

JAMES FLAHERTY: I don’t think it can be logic because of course there would have to be some premises that one would be applying logically. So what’s behind it, I would say a few things. Freedom, meaning and belonging. There are several streams running through it. One is chaos, to order – so the stages of addressing immediate concerns and balance which is the vast majority of people that I meet, that I know of are in those two stages. So that’s one stream. The second is to step from balance to conversations is a step of postmodern thought that appears in sociology and philosophy and literature which I think comes from Nietzsche to Heidegger to me. Nietzsche was someone who brought in a strong way to the west, the idea that there wasn’t something ultimately “true”. That true was according to time and place. And Heidegger brought that into his work and made it very personal.

MARK HARTNADY: Would you say that through the teachings of coaching at its deepest level, that's a philosophy that holds consistent across all schools of Integral Coaching – that Integral Coaches do not per se believe in an ultimate truth beyond observers?

JAMES FLAHERTY: You should ask them, I'll give you their names. I think that they would say there isn't some final ultimate objective outside of human beings, outside us. And if there is, human's can't find it. Another important point is Kant – 18th century, amazing fellow who posited that there may be an objective reality that he called “the things in themselves” but we can't ever get to them because of our human perceptual and language system. We are always caught in what we are *able* to perceive and what we are able to observe given where perception and language meet.

MARK HARTNADY: Coming back to the question, was there a particular event – a point in time, where you say and thought about this and out popped this model, or is this something that evolved over time?

JAMES FLAHERTY: It came out and it has evolved several times. It happened, I think I told you the last time, which was I used to tell students to work one level below where the client was to bring about the products of coaching. And people would nod their heads, and then eventually someone would ask me “what are you talking about, below what?” And that's when I came up with this model. It's had different names; different levels have meant different things over the years. The way that it is now has been pretty steady for 5 or 6 years.

JAMES FLAHERTY: The other important aspect it captures is “chaos” to “orderliness”, or “the world is happening to me” to “I am forming the world by...” constructing the world by how I interpret it, and then it goes from that mainstream philosophical sense to a more spiritual dimension in the last 3 levels, of narcissism, suffering and death.

MARK HARTNADY: Okay. Can we talk about some authors? The model for one's structure of interpretation – in what way's did Varela's work influence that model?

JAMES FLAHERTY: I had that model before I read Varela. It's more from Heidegger, and Maturana. Maturana and Varela wrote a book called *Autopoiesis and Cognition*. It was the coming together of those two that led to the SOI model.

[Familiar discussion not relevant to study]

MARK HARTNADY: The emotional stream of competence. I believe Robert Solomon's work, particularly “The Passions”, was quite influential. Could you describe that work?

JAMES FLAHERTY: Yeah, but also of course Goleman's work, *Emotional Intelligence* and the subsequent books he wrote about emotional intelligence. Heidegger also had a lot to say about emotion, at least about moods. But what's powerful about Solomon's text is that he has a taxonomy of emotions, so he starts with “anxiety” and then he has seven dimensions in which he analyses each emotion and mood. That to me was revolutionary, because he posited that emotions were not just random events that happen in our body or through relationships, but in fact that they have a strategy behind each one. He got that from Sartre : a mid-20th

century philosopher. One of Sartre's main tenets was that emotions always have a strategy – we're up to something in what we're feeling and he makes that quite explicit.

MARK HARTNADY: So, strategy beyond survival, or for survival?

JAMES FLAHERTY: Yeah, getting what we want, [consisting] ourselves from a hierarchy of power, making ourselves understood – all that. The emotional stream though, isn't so much about just that – it's about understanding the whole ecosystem of emotion which includes part of Solomon but it also has emotional intelligence in it and a big dollop from a book called *Nonviolent Communication*.

MARK HARTNADY: In our previous discussion you mentioned the importance of *presence* in the Somatic stream. Presence as I understand it is something related to a time dimension which I would interpret as a cognitive function, so being in the now as opposed to concerning oneself with past guilt or future fear. Can you help me understand better how being present relates to the Somatic stream of competence?

JAMES FLAHERTY: Yeah, usually how people understand being present is that you can be in the past, you can be in the future, you can be in the present. And being present means, as you said, a location in a time-line. But presence is different to being present. It's wider. Because presence includes the past, and the future. The present moment is always connected to both. And presence is a kind of deep openness, and readiness to respond to what arises. So, I think there is something different in developing presence as there is in being present. People can be present in a very superficial way. So that's what happened when you met Craig, is that he has developed over the years a very deep presence. He has a wonderful meditation practice; he is a deep student of many things including poetry, so he is emerged in the depths of life. He has a deep presence. So someone could be present like athletes have to be present – the ball is coming at them. Or, you're about to be tackled – or they are coursing down a steep icy slope, so yeah they are present but their presence isn't very deep.

MARK HARTNADY: Okay, but I still understand that as something that would cross over several streams, but you were quite distinct in our last meeting that this concept of presence is a Somatic concept.

JAMES FLAHERTY: Well, pretty much everything is in the Somatic stream. And I'll tell you what I mean by that. So even what we think of as "pure thought" has a Somatic component to it – for example, how can you tell that $2+2=4$ is right but $2+2=5$ is wrong. If you pay really close attention when you say that, or you think it, it feels correct or incorrect. There is a felt sense of it (being correct/incorrect). Anyway, all the practices, all the paths of someone having a deeper presence are Somatic, are physical.

MARK HARTNADY: In the flow of coaching, can you explain the difference between inviting someone into a new narrative, and a "distinction"?

JAMES FLAHERTY: Yes. So let me tell you what we mean by "distinction". It's the common notion that everyone uses. A distinction is employing language to point out something. You can look around the room where you are and you can make a million distinctions. Using language to pick up something that's in the background and bringing it into the foreground of awareness. So, a lot of what we say is a distinction. It's important in

coaching because it makes the client become aware of something they can't see right now, something they're not aware of, or cognitively blind to.

JAMES FLAHERTY: A new narrative is a whole bunch of different distinctions, brought together. It's a whole world of view, including emotions, mood, body sensations, possibilities, relationships, self-identity, and all that part of narrative – a new narrative.

MARK HARTNADY: On spirituality, and coming back to this as a domain of competence, have the spiritual philosophies of the Ridwan school influenced IC at all?

JAMES FLAHERTY: Yeah, but it didn't start there. We had that before I was a Ridwan student. But everything that we do is according to the experiences that I have, and the experiences that the other leaders have. We're always talking to each other and nurturing each other's thinking.

MARK HARTNADY: Could you give me an example of something that has changed?

JAMES FLAHERTY: Yes – so “narratives” are relatively new. You brought up distinctions. Instead of there being an invitation to a current narrative, there was an assessment, and so an invitation to a new narrative, there was a distinction. So that changed – so the words we used to describe to different [ten] changed. For the first number of years, not until 8 years ago when I really became a serious Ridhwan student, we didn't emphasise presence so much – we would talk about listening/relationship and that's been supplanted by the language of attunement and presence. Attunement is from a book called *A General Theory of Love* written by [Mini?] a psychiatrist in San Francisco.

JAMES FLAHERTY: So the way the Ridhwan school affected us was inquiry – to work with whatever experience the person is having in the moment is terrific. Whether it's “oh boy I'm really happy, or I'm confused or peaceful” it doesn't matter what the experience is, there is a process of inquiry which means following what's happening cognitively, emotionally, somatically with the person to see what's going on.

MARK HARTNADY: The courses that are offered at NVW – is the 5 elements model still used in PCC?

JAMES FLAHERTY: I don't think so – I think it's used in the... I don't know if the South African's are using it... we still use it in our introductory class called Coaching to Excellence class.

MARK HARTNADY: Many coaching institutions, including internationally, say that they practice “integral coaching” but I am wondering if that comes from the Ken Wilber or is this something that has stemmed from the work you have done, that has now been picked up and morphed and changed?

JAMES FLAHERTY: Well, it's probably different in each case. So Ken has a wide reach – he's written many influential books and has a powerful institutional presence and lots of eco-followers around the world. So there are some people who say they are doing Integral Coaching because they are taking into their practice what they learned from Ken. Integral Coaching Canada owns the word[s] “Integral Coaching” and “Coaching Integral” for Canada.

– the 2 women who started it, Laura Devine and [blank] were students of ours – we had a business relationship that fell apart. We didn’t hear from them – a year later they came back on the scene having copyrighted the term and having aligned themselves with Ken Wilber very closely. So we went ahead and got the rights to the states, not because we wanted to stop anyone but because we didn’t want to be stopped. There is another woman who owns the rights for the EU. So, in Europe we have to use a variant of our work, in South Africa Craig and Janine got the rights but they’ve ceded them to us recently. Ken’s work is a lot more rigorous and grounded in science – a bit more dogmatic than I’d like.

MARK HARTNADY: Okay. Can you tell me what direction coaching is headed into the future?

JAMES FLAHERTY: I think coaching, maybe 6 or 7 years ago, coaching crossed the line from being acceptable to being mainstream. So I think that it’s going to be more and more legitimate and as time passes more people will have more and more roots underneath it. More and more grounding so that it will be seen as a viable way of working with people and not only everyday topics like “how do I do a presentation” or how do I get my dog to obey me, but “what’s my life about”, “who am I anyway” etc.

MARK HARTNADY: So here are the esoteric questions. I’d really like to know from you, what you think it means to be a human being?

JAMES FLAHERTY: [Laughs]

JAMES FLAHERTY: Okay. I think it means to be a being that is tossed into a pre-existing world in which we have to find our way by being cared for by other people and learning the language and practices of our time and place, and from there developing and unfolding into human beings. Part of what it means to be a human being is to have vast potential both in the direction of greater love and compassion and generosity but also cruelty, destructiveness. And there aren’t any built in constraints in our body and mind to go in those directions?

MARK HARTNADY: And linked to that what, besides the *products of coaching* would you say the ultimate *purpose of coaching* is?

JAMES FLAHERTY: I’d say in two short phrases, one is to lessen suffering. Part of being a human being is that we are apparently in this situation where everything and anything we try is going to be unsatisfying. At some point it’s going to turn sour or fall apart or fitting for us anymore. So lessening suffering, that’s one. The other way of saying it is increasing our experience of freedom and joy. Freedom and joy is not a solitary event. We’re connected to other people.

MARK HARTNADY: Two more questions – is there anything on your mind recently that you’ve thought about bringing in to the flow of coaching or anything new that’s...

JAMES FLAHERTY: Oh yeah there’s tonnes. One is all the work in brain science that’s happening. Some of it is [unclear] and silly but some of it is interesting and important. So all the work in brain science and cognitive science. Also, there is a lot of spectacular work there’s been done these days in understanding the phenomena and cultivation of non-dual states. Non-dual as is the elimination of subject-object dichotomy. So, bringing that in more

fully. And also, I suppose which is corollary to the first one (brain states) is understanding more fully the body, in all the ways the body, shapes, are experiential, possibilities from body shape, all of that. And then, destiny and fate. So, I am currently reading a book called *Fate and Destiny* by someone called Michael Mead but what got me interested was a ten-day retreat I did during the summer – given by 2 of founders of the Ridwan school. Hameed used the word destiny quite a lot. So my current understanding is that there are circumstances that are happening – some of which we know about, some of which are behind the scenes. E.g. Who knows what's happening in the Spanish parliament right now and what the consequences of that will to EU monetary policy and what that will do to world stock markets, job prospect, and all the rippling out of that. And we can pick ten or twenty things out of that background that are way out of my control that are going to shape what's possible for me. So I think that's fate – the fact that you are living in South Africa now than 50 years ago it's very different. The destiny part is, and this fits in to the 10 (at the level of vocation), I do think that it's true that each person, from the most famous who are cooking fried chicken, has something to bring to the world that fate gives us the chance to bring it – the theatre, the situation we get to follow out our destiny – respond to the situation that's there.

[Familiar discussion not relevant to study]

MARK HARTNADY: Is there anything do you think has been left out?

JAMES FLAHERTY: I think for me, Mark, the really important part is the “human beings” – we're at a delicate point of balance and we can go in many different directions and the point of Integral Coaching is not only to help individual people lessen suffering and have more joy and freedom in their life, but to help tilt the balance of what we're doing overall is human so that we can live harmoniously with each other and our environment. It's the time and the place. Just like when psychoanalysis arose to meet a particular need that was within the culture at the time. Ours is similar.

[Thanks and pleasantries]

[End of interview]

7.7. Appendix 6 – Transcript – Interview with Janine Everson, 4 November 2011

[Introductions]

MARK HARTNADY: Could you please elaborate on your exposure to some of the history of IC? For example, what do you know of James' experience growing up in a Jesuit school, the beginnings of est, the founding of Hermenet, anything that jumps out from taking a look at this guide?

JANINE EVERSON: The only things I know are the things that have been shared by James. My exposure to Rolfing and somatics is at a level of personal exposure. So I can attest to working with [theological] structures. I align to that not just because of what *he* says, but because of my own direct experience.

MARK HARTNADY: Okay, have you taken that further and researched somatics?

JANINE EVERSON: No, that's one of many areas we haven't done, and I'm coming comes out in this report.

MARK HARTNADY: What Steve mentioned was that he went to the Strozzi institute, to really understand the somatic stream. So a lot of what I'm talking about refers back to that.

JANINE EVERSON: Richard Strozzi's wife does conscious embodiment so her root is the same. She used to teach us at the Somatic day on James' PCC for a long time, and now Steve does that.

MARK HARTNADY: Have you had exposure through reading any of these works, phenomenology, Heidegger...

JANINE EVERSON: Yes, and around Speech Acts, and mood. Solomon's passions we use a lot. In fact, it was his doctoral thesis. That has been a direct influence.

MARK HARTNADY: What was your learning from this book?

JANINE EVERSON: This book allowed me to understand the impact and philosophy of life and living. And what it is that makes philosophy relevant and important for us to know and understand when we look at other human beings. That was a big impact – side-effect.

MARK HARTNADY: Can you elaborate a bit on that? What exactly is it about philosophy that is relevant in the work you do?

JANINE EVERSON: It makes you think more deeply about what makes human beings think how they think, how they process. So for example, he sits there, and he talks about the [myth] of innocence – innocence versus reflection – which is linked to “reaction vs. response”. If you reflect, and go deeper and respond that means you are in a different state. You're aware, so there is choice, awareness. Which is our whole thing – the importance of self-awareness. The more self-aware you are, the more levels of choice and possibility you have and he talks about distinctions as well. He talks about our emotion – how our passions (or moods) are not something that are forced upon us, they are always our choice. So he links the various philosophical streams like romanticism, reasoning, etc. For me, this was a fabulous way of bringing out the emotional stream. This book explains the emotional stream very powerfully and the importance of emotion and how it links, all grounded in various philosophies – so what's the purpose of an emotion? It's there to get something done?

MARK HARTNADY: Do you know when he wrote this?

JANINE EVERSON: Passions was first published in 1976. It's the theory around emotions and judgement. His argument is that emotions are the meaning of life. It is because we are moved that life has a meaning.

MARK HARTNADY: This sounds like the same kind of line as Heidegger and continental philosophy about not looking at life through a logical lense, but rather let's look at life through what it means to “be” and to “feel” and that's what brings fulfilment.

JANINE EVERSON: Yes. And the fun thing about Solomon is that he talks about Nietzsche, he can quote every philosopher, and he does. He argues one against the other – like Sartre vs. other views but he's far more accessible. I read this book and really enjoyed it whereas Heidegger is a bit of a grind. This is the same concepts as Heidegger but done through the lens of the emotional stream.

MARK HARTNADY: Steve March was saying that a lot of the work that Maturana did, came to the same conclusions as Heidegger, but through the lens of *biology*.

JANINE EVERSON: Yes, indeed. So what Solomon does that impacted coaching is catalogue various emotions – which I've highlighted some of in the book – for example, if you want to work with someone in coaching in the emotional stream, who has issues with guilt, let's say, we can see that it's inner directed, the scope or focus is on the particular to the general, etc, etc. So he has various attributes for every major emotion that he's identified (alphabetically). So if you're coaching someone who is stuck, and can't get unstuck, it's very useful.

MARK HARTNADY: So through this, he will explain what's going on. But does he suggest what then to do?

JANINE EVERSON: No.

MARK HARTNADY: So how would you?

JANINE EVERSON: Well that's the rest of the theory. That's coaching. I would use a coaching approach.

MARK HARTNADY: So it's more used for an assessment?

JANINE EVERSON: Yes.

MARK HARTNADY: I've picked up in my research that some of these authors have been very influential, and some less so. Heidegger, Habermas, Wilber, Maturana, Almaas. I'd quite like to focus on them given the time.

JANINE EVERSON: Yes. Just a note about Almaas. Almaas writes extensively and he heads up the Diamond Approach at the Ridhwan school – Seven years learning, and then another seven years if you want to become a teacher. It's a school of spiritual philosophy. Almaas, his pen name, Ali is his real name. James had a Ridhwan teacher for many years but he wasn't attending any of the classes – he is now in his second or third year. The way the Ridhwan school works with groups, the way they engage with people, the way they talk about communication, has quietly had quite an influence on the way in which we teach – particularly in PCC and the way the facilitators work with the students. Philosophically the Diamond approach and the way we work with people on the PCC are aligned.

MARK HARTNADY: Could you explain the basic philosophies of Ridhwan?

JANINE EVERSON: Well the best person to ask there is James. He has just become a Zen Teacher. It his way of being, and Sarita, and us, those of us who are in leader training – it's because of these influences. It's not just that you learn and deliver – it's a way of being that comes through these philosophies and spiritual traditions. So there's another whole element but what is it that allows someone to be ready to deliver a programme like this.

MARK HARTNADY: Can you tell me about the concept of one's structure of interpretation. Anything that you wouldn't necessarily deliver in a coaching workshop?

JANINE EVERSON: On PCC, we highlight to people that your SOI grows over time. So when you are born, you are born with a body and a place of impact, and its only me and my mother and me and my immediate care-giver, and so you get a layer of interpretation of how the world is, and then you grow a little older, and find a family and that impacts you. And then you grow even older and you have the impact of your education system, your society which may or may not be allowed in to home environment so it depends on what's allowed in. So you have the subtleties of yes, this is my DNA birth structure, this is my immediate structure, then there's the familial structure and then there's the environment, and then there's what's allowed in, and then as you grow up you start to become more solidified. So this fundamental narrative, this fundamental SOI, doesn't really change. So the thing we work on with the three panels is that you get stuck. So there you are, you've got your SOI in all its marvel, and then it's like "how do I can this?" when there are so many layers and such complexity.

MARK HARTNADY: Was any of the work that Maturana and Varela did around biology and body linking this model to how the brain works and how over time one establishes more rigid neural paths which is analogous to your perception of what is fundamentally you.

JANINE EVERSON: Well Maturana thesis, which is in the *Tree of Knowledge* – which is a book which is quite hard to wrap one's mind around. This is where he first talks about biology and the brain and how it all works, but not in the same sense as neurobiology talks about it. Remember, in those days, neurobiology wasn't even a word. Maturana was way ahead. In terms of neurobiology itself, it all hangs together. So *Tree of Knowledge* is very theoretical, this book, *Ethical Know-How*, is a great foundation for SOI. This is the book that inspired James – the source of the three panels – panel 2, that the world brings us forth and we bring forth the world.

MARK HARTNADY: And was that written before his work with Maturana?

JANINE EVERSON: These are some of his lectures. It was published in 1992 but that's not the original. I'm not sure. These are lectures that he talked through that someone taped and transcribed.

MARK HARTNADY: The assessment models that are typically used are the 3 main models, but in James' book he talks about the streams of competence but then he also talks about the 5 elements. What I struggle to understand is the difference between these 5 elements and the 10 ways. Is there a connection at all, was it an evolution.

JANINE EVERSON: The five elements is a model for CTE. CTE is not the same flow as PCC. The 5 elements model is where you have past (commitments), present (concerns), future

(possibilities), mood and personal/cultural history. This is just another model. I was interested, when James talked about the evolution of coaching this was one of the foundational models before the six streams and the ten ways.

MARK HARTNADY: So his book is dating.

JANINE EVERSON: No, that's type I and II coaching. He talks about it as type I – which is *Spontaneous coaching* and type II, which is *Competency Based coaching*. You don't do *Way of being coaching* (type III – lie coaching/fundamental change) until you get to PCC. So these models are simpler.

MARK HARTNADY: Okay, so *Spontaneous coaching* you talk about conversations, you talk about “I / we / it” as an assessment model.

JANINE EVERSON: Yes. There are three different types that differ in depth and time. The models used in Spontaneous coaching is SOI and the concept of working to expand that, and the flow of coaching, which is relationship/possibility/action and distinctions. Which they don't even teach anymore in the states as they found they couldn't teach it.

MARK HARTNADY: Can you explain what is the difference between inviting someone to a new narrative and offering a distinction?

JANINE EVERSON: Well that's James' point – he thinks they're the same thing. And they could be, but let's not also lose the value of stretching someone's SOI at other ways and at other times through the use of distinctions. And using that as a point of teaching, as how to do that. Because we teach a lot of executives only spontaneous coaching. So many people only learn spontaneous coaching. *[Continues to discuss difference in types of coaching]*

MARK HARTNADY: If a client comes to you with a fairly simple problem, surely there is no end to coaching if they continue moving down the ten ways?

JANINE EVERSON: Its true, and there are realities of time, funding and life. But your role as a coach is not to develop a permanent relationship with your coachee and see yourself as a lifelong partner. What you want to do is open their possibilities and SOI enough that they are self-correcting and self-generating enough that they can continue their own development under their own steam. For example, with the PCC leader group (of which 5 certified leaders, and another 5-8 leaders-in-training); when I was a leader-in-training, we started this in 2002, and we received coaching in 2001 (I was his case-studies for the PCC). So the CFC, I was running CAP for the BSG MBA programme. I was looking for a real life consultant who could come and work with me to give the thing credibility. It was Paul Sulkis who gave me Craig's O'Flaherty's name, so I called him up and said can you help me, and he said yes and he came and helped on CAP. And while we were working together he explained to me that he was studying the year-long PCC with James in San Francisco. So I was very intrigued.

MARK HARTNADY: What year was that?

JANINE EVERSON: 2001. And then he said it was his dream to open up something in partnership with the business school because its his dream to bring this style of coaching to South Africa. So I said what a fabulous idea, I'd love to be involved. And he said, okay, but

before you get involved, why don't you first experience being coached so you know what you're getting yourself into. So I said fine, and he needed a case-study for his PCC so I said fine. I then because his case-study which he then finished at the end of 2001 and together we started saying, well how can we open up a relationship here – a partnership – and at that time we had a director called Nic [Seagel], and through Craig's talking to him and me talking to him, he said as long as there's an Academic Director, and the GSB has no risk, then he's happy for it to start. And that was the birth of the centre. We started running CTE's in December 2001. But officially, the Centre opened in 2002. Then we were only licensed to run the CTE until 2004. Because during that time Craig had to do his PCC leader-training. So he started to become a PCC leader in 2002. And he studied and would fly to the states to do this training.

MARK HARTNADY: Why did he feel he needed to become certified to do coaching? Why didn't he just learn as much as he could and when he felt ready himself, just do it?

JANINE EVERSON: Craig's philosophy is, if you're going to do something, it's got to be credible and rigorous. He decided he wanted the ICF (International Coaching Federation) accreditation and instead of him rewriting James' work and doing it here, and not recognising the root, he would bring a recognised process – it's an internationally accredited course – and he really connected with James' style and the philosophy of the school of *this* coaching. Why reinvent something that's been established with rigour for over 30 years? And I agree with that.

MARK HARTNADY: So how did the word spread? The CFC has some big clients? How did get from that point of nowhere to where you are today?

JANINE EVERSON: Well, first of all, we run under the Executive Education banner for UCT. But it was hard in the beginning – I spent a lot of time on the phone. But never underestimate the power of the brand. So it's a GSB presence where we go.

[Explains the audience differences between CFC and NVW: CFC more executive, NVW more esoteric and individuals]

JANINE EVERSON: So 2004 was the first ACC run, and 2006 was the first PCC run in South Africa. *[Explains that NVW dropped the 6 month course, but people investing in a 6 month course in SA needing to switch to 1 year was problematic; they also couldn't manage the full year course; struggled to grasp fundamentals, etc]*

JANINE EVERSON: *[Describes how the inner self-development work of the coach is never complete.]*

MARK HARTNADY: So what is the ratio of people completing CTE, vs. ACC vs. PCC?

JANINE EVERSON: I've got the numbers but it's about 1100... Let's say out of 6-10 CTE, you get 2-3 ACC's from which you get 1 PCC. Mostly corporate and about 10% private.

MARK HARTNADY: Thanks. Could you elaborate on the history of NVW's expansion to Canada and internationally?

JANINE EVERSON: Yes. The first off-shoot of an international nature of NVW was the Centre for Coaching. We have generated research because of the nature of where we are. James' vision was to bring IC to more than just America. So, there are some Canadian coaches who studied together with Craig and opened the Centre...

MARK HARTNADY: Laura Devine?

JANINE EVERSON: No, no. Well, I see what you mean. They did it briefly, fairly recently; Charles Brassard and Pamela Pritchard do Integral Coaching in Canada under the name *Convivium*. (They offer the PCC under the NVW banner in Canada). So really, Integral Coaching is spreading through the use of a model. It's not NVW going out there and spreading it; it's an organisation owned by PCC graduates and they deliver the coaching in Canada.

MARK HARTNADY: But there is another IC school in Canada? Completely dependent.

JANINE EVERSON: Yes, in competition. That's Laura Devine's company.

JANINE EVERSON: NVW also do coaching programmes in London and Singapore, but under their own brand. And also soon to start - Copenhagen. So I assume it's safe to say that this work is spreading.

MARK HARTNADY: Could you elaborate a bit on Adult Learning and the Centre for Coaching's contribution to this research?

JANINE EVERSON: Craig came back from NVW's PCC programme, and said this needs to come to Africa. It was his idea to approach the GSB and mention that if the school wanted to become in the forefront of executive education, then they should collaborate. So in 2002 the CFC was launched. Part of my mandate as the Academic Director and part of our mandate in terms of the centres credibility and worth to the GSB is that we supply a stream of credible research, both for the benefit of coaching in general, but also to the GSB. Part of that, in those days (10 years ago) there was even less credible research on coaching than there is now (credible research) so we said, we've got to find a credible academic root for what James does and why it works. So because we're in a teaching institution, how can we explain what we do and how we work with people, not only in the 1-on-1 but in how we *teach* people how to coach. How can we explain it in a way that makes sense to business audience to people who've never heard about coaching and don't want to – and so when we started researching Adult and Action Learning (Kolb, etc), we realised that there was a big overlap between and alignment between what we do and how adults learn and what adult learning theory says.

JANINE EVERSON: So, we then had to try find ways to make sense of what we were doing using academically credible sources as opposed to saying, well, it's the *Way of Being*. James had never articulated to us any learning theory, any teaching theory behind the way he taught – and I think for good reason because I don't think he's ever studied teaching methodologies as such. It just so happens, that because of the wisdom and philosophy he has aligned the way in which he teaches to his audience which are adults. He's never mentioned to me any particular reading he's done in adult learning.

JANINE EVERSON: So that's how we ended up having to develop this whole way we wrote as we were doing it in an academic void – so we decided to use language that would make sense.

[Interruption]

JANINE EVERSON: So Craig did 4 years of teacher training work in the US with James – studying how to become accredited to run these programmes. He was the first leader to be accepted after James and Sarita to run the PCC.

MARK HARTNADY: How many PCC certified trainers are there now?

JANINE EVERSON: James, Sarita, Craig – founder/senior leaders. Then me, Pamela, and then Steve and Charles have just been certified in May. So seven.

[Pleasantries and end of interview]

7.8. Appendix 7 – Relational map of concepts, events and thought-leaders informing IC

Image has been divided across four pages due to the level of detail that cannot fit on a single page.

Legend:

- **Blue man icon:** Deceased individual (indicating date of birth and death)
- **Green man icon:** Living individual (indicating date of birth)
- **Notepad:** Major work (publication)
- **Light bulb:** Major concept (complex) informing IC
- **Arrows:** Indicates relationship between two entities (the nature of the relationship is described in the text written on the arrow; when no text is present the relationship is simply “source influences target”)

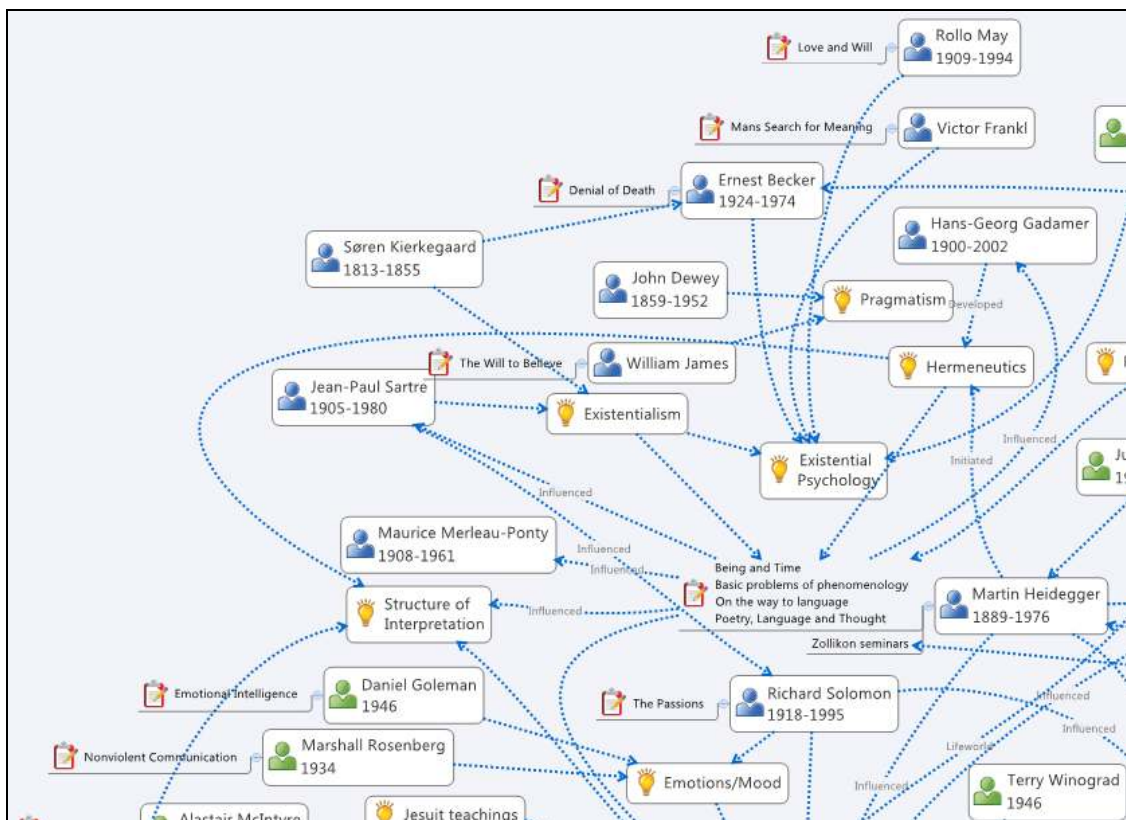


Figure 9: Influencers of Integral Coaching (upper left)

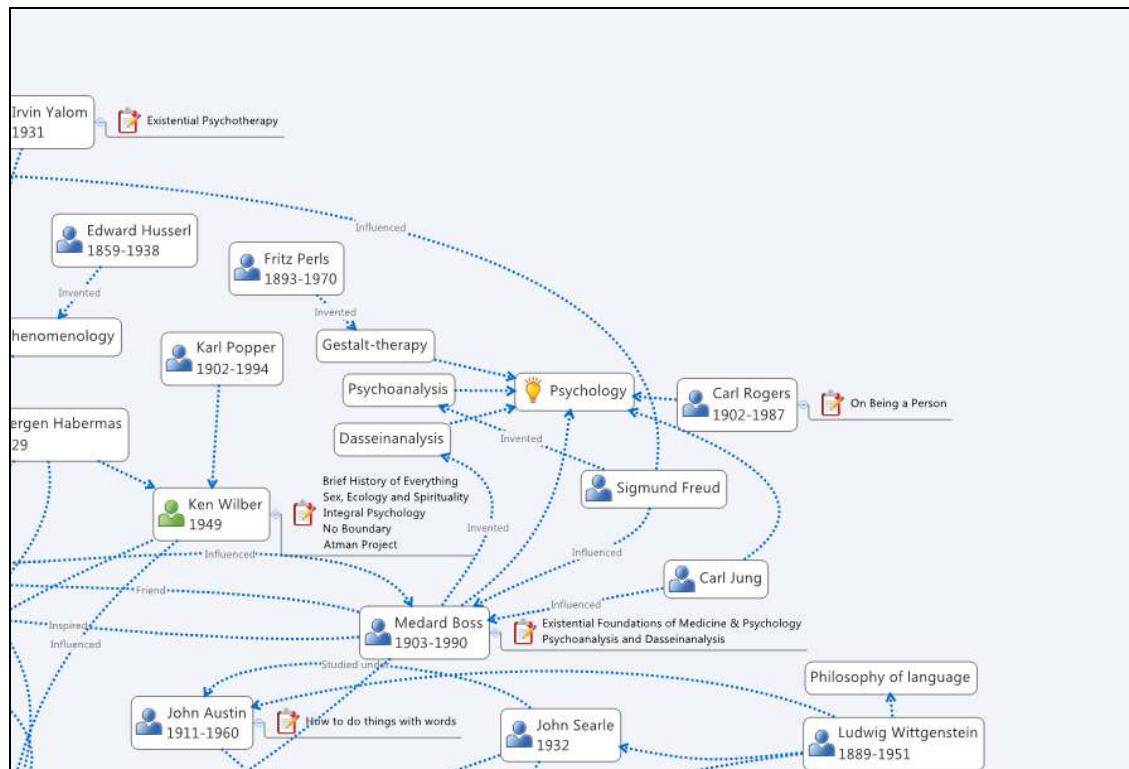


Figure 10: Influencers of Integral Coaching (upper right)

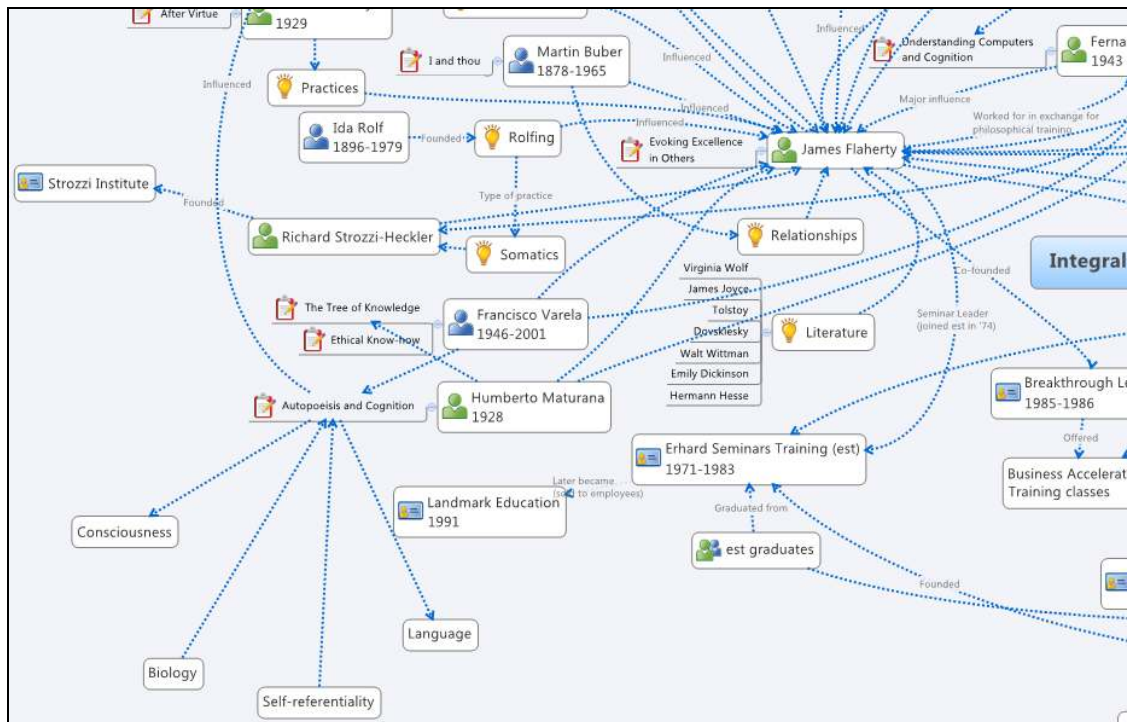


Figure 11: Influencers of Integral Coaching (lower left)

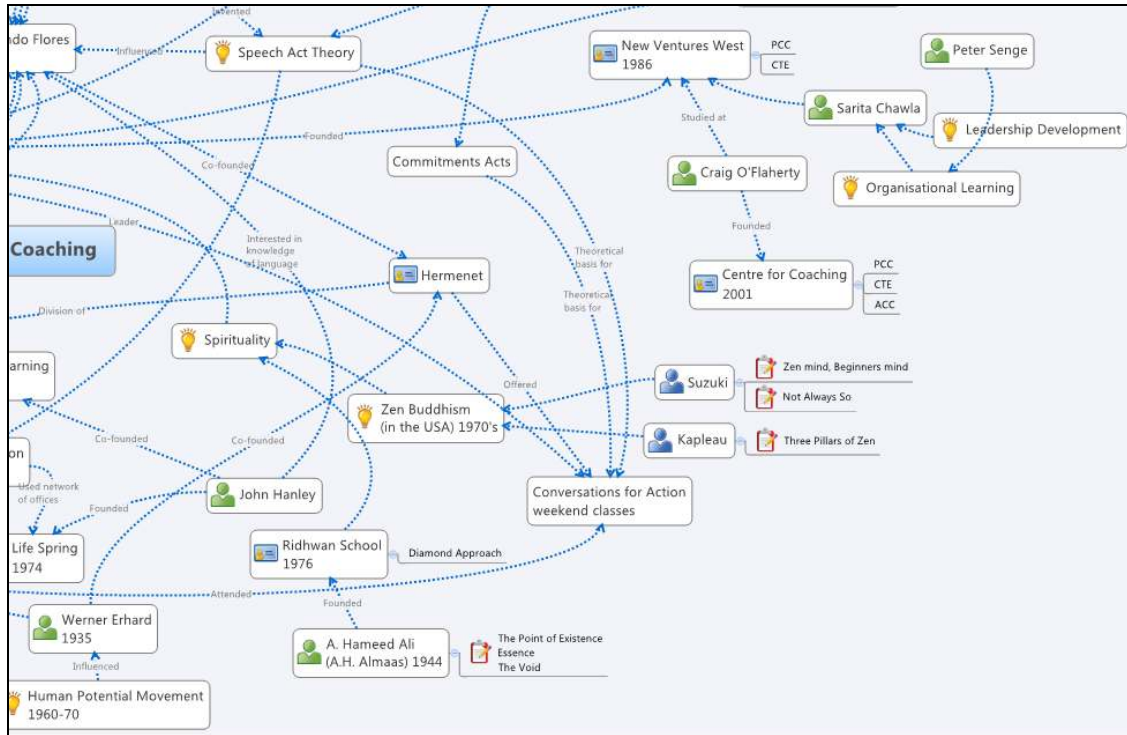


Figure 12: Influencers of Integral Coaching (lower right)