Response to Kjellström

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In *The Ethics of Promoting and Assigning Adult Developmental Exercises: A Critical Analysis of the Immunity to Change Process,* Sofia Kjellström has broadened the discourse around Kegan and Lahey's (2009) Immunity to Change (ITC) process with her critical examination of issues related to this work. She identifies ethical concerns, facilitator capacity, informed consent and the cognitive demands of the process as areas deserving attention to enable the intentions of this work to best serve a growing community of practitioners. Reading Kjellström's article, I noticed a number of points that I want to respond to. Since my recent report from the field (Reams, 2009) I have had the opportunity to run the ITC process with three different groups, which has given me new insights into what can be sometimes implicit areas. In the future I hope to engage in a deeper analysis of a few specific areas that have caught my attention. For now, I will present some preliminary thoughts based on Kjellström's article.

My first response is of appreciation to Kjellström for opening up the space for critical discourse in this area. While I will present some views contrary to hers on some of the issues she raises, it is only due to her having raised them in the first place that I have been motivated to reflect on them. Her inquiry helps to identify what may be some implicit assumptions of the authors of the process. While neither of us can speak for Kegan or Lahey, we can present opinions drawn from their writings and our experience.

I will begin at the beginning, at least in terms of how one begins the ITC process. In describing how she introduced the ITC process to participants, Kjellström "emphasized that they should not disclose more than they felt comfortable sharing" (p. 120). I have taken a slightly different approach to this. I emphasize to participants that they will get out of it what they put into it. Thus the more they can connect with something personally meaningful, the more potential for insight the process can offer. Upon reflection, I can also see the value of including the kind of framing Kjellström describes.

Kjellström describes doing this process both over a two hour class period and though a web platform. Both of these settings raise issues for me based on my experience. I have been fortunate to have whole day classes or workshop settings to work within, and have been able to take at least four hours for the process. From these experiences, I would not want to try running the process in any less time. In running the process through a web platform, she describes how the students read two articles, listened to a lecture and then filled out the four columns according to written instructions. Based on my experiences, I cannot imagine trying to run the ITC in this manner. I have found an ongoing need to reframe and re-interpret the instructions to participants. Part of this may be due to language issues, (many of them have been Norwegian, with varying degrees of competency in English), but I believe that more of it arises from the normal

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differences in understanding and interpreting language constructs based on stages of development differences as well as cultural and life experience differences.

Thus when Kjellström notes that failures for the participants occurred due to either failure to complete it or refusing to do it, I cannot help but think that a good proportion of those failures could be attributed to the limitations of time and format utilized. While I have also observed the process to have less than optimal results for some participants, I would not have called them "failures." I have also not had anyone refuse to participate.

The difficulties Kjellström identifies with participants having troubles putting appropriate content into the columns is familiar to me. I recall the first time I ran the process, one participant filled out all four columns in 15 minutes! She treated it like an action plan, and thought she had done what was asked. This kind of experience led me to guiding participants through the process by giving them one task at a time, each on a separate worksheet and only after doing three of the columns put them together on one page. This allowed me to control the focus of attention better, which I came to see as a significant issue.

The primary issue which led to my greater interest in having more control over the focus of participants' attention was that I noticed them going down what appeared to me to be habituated tracks. One of my reflections is that this process is inherently asking people to pay attention in a direction that is not familiar or habitual. The work appears to many as being continually counter intuitive. From this, I have experienced a constant need as a facilitator to work with participants on keeping their attention focused in the intended areas.[2]

Kjellström describes difficulties for participants in articulating a personal fear or worry that could then be turned into a competing commitment. I have also seen this issue. My perception is that it can arise from two things. One is that people often tend to place more qualities than behaviors in column two. This makes it more challenging to imagine doing the opposite and getting in touch with such a fear or worry. (This is also related to the importance of landing a good first column commitment, as if this does not happen, everything that follows is more difficult to find). The other is that I have an impression that the deep seated defense mechanisms of the big assumption underlying the particular system people are inquiring into can foresee its own exposure coming so to speak, and take measures to blind a person to it. As Kegan and Lahey say, when you get to the big assumption you often encounter warning signs like "do not enter," or "danger ahead." It may be that these defenses begin to operate earlier, at the first hint of exposure. Thus extra guidance or facilitation could be required to help participants keep moving down the intended path.

In examining facilitators' choices and capacities, Kjellström recognizes how the perceived failures or negative responses to the process may have been impacted by how she led the process. This leads into an examination of issues focused on the role of the facilitator. I agree that here it is important to distinguish this aspect from the impact of the process itself. Any tool is only as good as the person using it. At the same time, if one has a poor tool, even the best facilitator will be hard pressed to do a good job with it. The issue of facilitator capacity is a broad

[2] In the future I hope to explore in depth the nature of this phenomenon from the perspective of David Bohm's notion of thought as a system.

topic and time does not permit me to do more than briefly mention a list of issues I perceive as related. There is of course the issue of cognitive development, that a facilitator will only be able to work with what they can perceive and that the subtler movements of attention by participants can be hard to track. The quality of presence, or interior condition of the intervener, (to recall a key element of my earlier review of Scharmer's Theory U), is also a critical issue for facilitators and not an easy one to address. As well, the skilful means of the facilitator will be important as I have found that practice looking after specific issues related to running the process helps! Finally, how can a facilitator use all of the above to enable participants to scaffold up into a space where they can, (if such assistance is needed) at least temporarily operate at a required level of cognitive functioning to enable the successful completion of the 4 columns? All of these and more issues of facilitator capacity seem relevant to me in relation to the "success" or "failure" of participants' experience with the ITC process.

I agree with Kjellström that the ITC process needs to be carefully introduced or framed. She notes the importance Kegan and Lahey give to advocating for the value of the process. Enabling participants to have a good reason for engaging in the process is critical. If they feel coerced due to expectations of following authority in the form of a teacher, then it will indeed be much harder to connect to the work in the way I feel it is intended.

It is within the context of introducing and framing the ITC process that the issue of informed consent arises. Kjellström raises this as an ethical concern, that if people really knew what they were getting into then they might choose not to participate. Her view is that the "ITC process seems to be constructed on a major implicit assumption of change as always beneficial to all people" (p. 129). She thus recommends that a richer informed consent be used and that it "is determined from within the individual" (p. 129). This raises a number of related questions for me which I will explore briefly.

I think she is correct in that some might have illusions about what they are getting into, and choose against participating if they really understood what was to come. I can think of many times in my life where if I had known what was coming I might have declined to engage a certain experience. As a counterpoint to this, I could say that if participants had it all spelled out for them in advance so that they had such fully informed consent,[3] it would in some ways circumvent the process. My view is that the "surprise" elements of the ITC process simulate real life issues where we often encounter situations that stretch and challenge us and that in the end we perceive as having been good and even essential for our growth, but that we would not have engaged in if we had a choice and known, from our previous consciousness, what exactly we were getting into. This seems to me the point that Kegan and Lahey make when they say that when we enter the territory of the big assumption, we often encounter "do not go here" signs, as the defense mechanisms that protect identity from its natural evolution would by doing their job (as the competing commitments and 2nd column behaviors show) and thus keep us from ever going there. This seems to me to be the point of calling it an immune system – it has a powerful ability to detect and resist change.

[3] I would question even being possible as even if we give participants words about what they may experience through the ITC process, those words may not convey the depth of what they may experience, leading to them saying "you didn't tell me you meant this" with us responding "but that is what I told you when I said … ."

There is also the issue Kjellström mentions of teachers being in an authority role and having great power in choosing what curriculum students are exposed to. As a comparison, parents often take such responsibility for their children, encouraging them to try things that they feel are going to be ultimately good for them even if they don't like it at the time. My experience is that a similar process often goes on, where as a teacher I encourage students to engage in activities that from their current perspective may not be their first choice, but from my perspective as being responsible for guiding their education, are something that can serve them well. Thus I feel that while the issue of informed consent is important, it is also complex and requires real attention to how we as teachers and facilitators introduce the ITC process.

Along these lines Kjellström asks "what right does a teacher [have] to create optimal conflicts in peoples' lives?" (p. 123). While I can see how this question arises from her focus on perceived ethical concerns with the ITC process, I also have a different view of this. My experience is that change is indeed the only constant in today's world. As well, creating such "optimal conflicts" can be seen as similar to Ron Heifetz's view of leadership as creating a holding environment for people to do the adaptive work that the challenges of life bring them. So I do not feel that the creation of such situations is outside of participant's everyday life experiences. In fact, it could be seen as helping them by bringing such situations into focus so they can be reflected upon. It can also be seen as doing this in the relative safety of a somewhat controlled learning environment, where the consequences are not as direct and serious as when one might attempt to deal with such things in everyday settings. So this question could be reframed to see the creation of such situations not as a right of teachers or facilitators, but as a duty or gift to give.

In thinking about the perceived desired outcome of developmentally oriented change, Kjellström raises questions that lead her to ask "if this is "adult development" or manipulation?" (p. 126). I agree with her that as with any tool, much depends on the motivations of the facilitator and that manipulation is of course a possibility. However, my sense is that the majority of us using this work are drawn to it from motivations arising from our experience of the value of developmental work. My own view is that we cannot force or manipulate development anyway, but can merely lead people towards the opportunity and see if they take the step for themselves. As well, it appears to me that much of this work is planting seeds that we may or may not see any fruit from during our interaction with participants. In this way I do have the same concerns as Kjellström about manipulation.

Kjellström also raises the issue of how people at earlier stages of development may experience the ITC process. While I agree in part with her saying, "I do not think the solution of encouraging people to change and "develop" is either possible or an ethically-sound solution for all situations, because it will create expectations that are too challenging and over the heads for some" (p. 126), I also feel that it is possible to go too far in protecting people from growth and challenge. Life will generally bring us challenges, so working to help people find better ways to utilize these challenges by providing some support in the form of the ITC process. It is not a panacea for all issues and all people.

I do believe that the ITC process can, done with good framing, proper time and settings and appropriate facilitation, produce significant results. My most recent experience was with the second year of the Masters in Organizational Leadership course I mentioned in my report from

the field last year. Applying all that had been learned from previous experience, the results were a significant improvement from last year. This was not only evident from observation, but also from reading the exam essays and course feedback. While it was clear that the depth of what was gotten from the process varied according to the reflective capacities of the students, it was also evident that each got out of the process something that was significant and appropriate for them.

There are many other points that I would like to respond to, but time has not permitted me to complete this in the depth I originally intended. I will leave the more detailed critique of Kjellström's article to David Zeitler's article in his issue. My hope is to return in a future issue to a more rigorous exploration of some of the subtler patterns of attention that I have noticed in my more recent experiences with the ITC process.