Little Book of Practice

for Authentic Leadership in Action

By Susan Szpakowski
Illustrations by Barbara Bash

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ALIA
PRESS

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Text © 2010 by Susan Szpakowski
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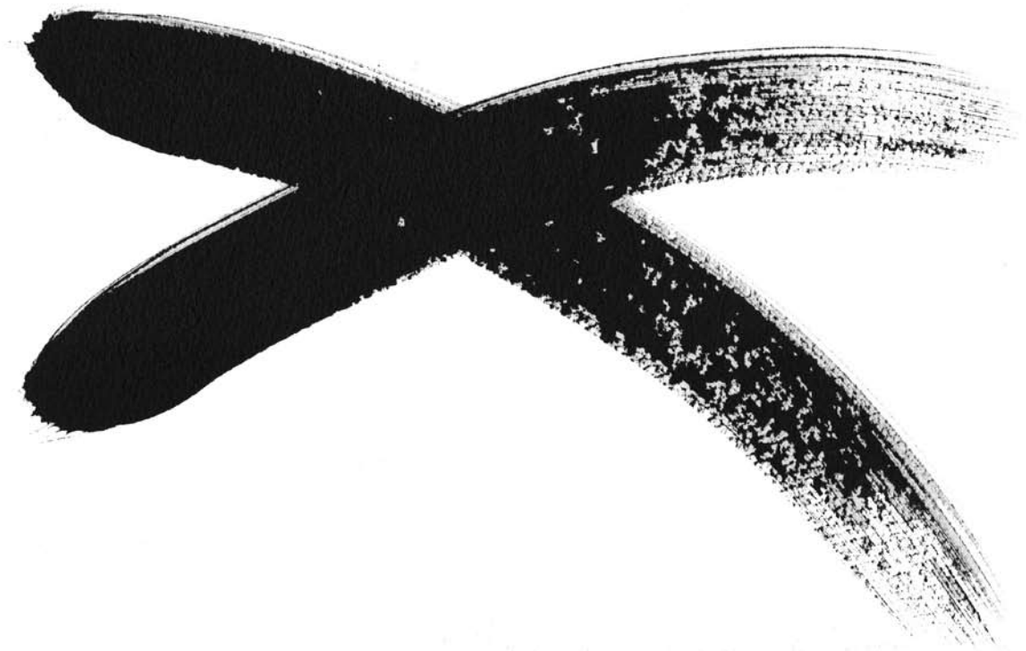


Welcome, travelers.

Over the past decade, the ALIA Institute has been situated at a crossroads, like an inn at the convergence of multiple trade routes. Many explorers have passed through—some global thought leaders, others everyday leaders in search of new thinking and new solutions. Business leaders, NGO executives, artists, meditation teachers, social entrepreneurs, academics, clergy, activists, and policy-makers have all spent time here. For some the Institute has become an annual destination.

The ALIA Institute began as the week-long Shambhala Summer Program, which has been convening in Nova Scotia since 2001. This gathering has seen a convergence not only of people but also of leadership theories and practices, ranging from those that have been refined over thousands of years to new models and approaches that are being rapidly developed and tested in response to the conditions and challenges of our time.

From a distance, this gathering might look like a colourful and chaotic display of people and disciplines. But ever since the Institute's first Summer Program, I have been in awe of the level of coherence that seems to "show up" of its own accord, in spite of the great diversity of people, cultures, and methodologies that come together for that short week. This coherence seems to exist between or beyond the parts as if something bright and powerful is able to shine through.

People often say that there is nothing quite like the ALIA Institute, and many return year after year, sometimes making the journey from the far reaches of the globe. When reflecting on their experience, they often talk about the uncanny relevance of the learning, the synchronicity of the connections, the deep learning and shifts of perception. I believe that all of this is made possible by something more elusive than can be explained in a program brochure. I have come to realize that what seems like magic is actually the power of authenticity, our own nature, which is already present but usually hidden away.

The leadership practices that converge at the ALIA Institute each play a part in revealing, amplifying, and harnessing this authentic nature, this hidden potential. Those of us who have been involved in organizing and convening the Institute have been building a body of tacit understanding about how these practices work together, and how they can be applied in various professional fields. As we enter our tenth year, this Little Book is an attempt to capture and make visible some of that understanding.

I see the ALIA Institute, this inn at the crossroads, as a place of cross-pollination, incubation, and training for what is to come. Ultimately, programs aren't enough. As leaders, we are increasingly called to create spaces where inspired thinking, deep learning, and bold emergent action can take hold, wherever we are. So while thousands of people have come to ALIA programs, acquired specific leadership tools and practices, and had a whiff of something else, I feel that now it is time to further illuminate and articulate the "something else," so that we can all continue to strengthen our capacity to create the conditions for authentic community and enlightened action.

ORIGINS OF ALIA

We could say that the ground of the Institute is trust in authentic human nature. While this is true it is also not the whole story. The Institute's ground has a specific texture, a deeply embedded pattern, which comes from its origins in the Shambhala wisdom tradition. Most of the founding members were students and teachers of this tradition, and its practices and insights have been an invisible compass that has guided us along the way. This was especially true in the beginning, when we were literally creating something out of nothing. As time goes on, this deep pattern continues to mix with many others, creating a new synthesis that is now stewarded by an increasingly wide and diverse group.

At its core, the Shambhala tradition is not about any particular dogma or religion, but about connecting with reality. When we connect with an authentic way of being, our guiding purpose and our actions become more aligned with a natural order. We are able to recognize what is authentic and helpful in ourselves, as well as in our environment. The tradition itself is a synthesis of "authentic and helpful" wisdom and forms from many cultures and historical times. It is this timeless, ancient quality coming into the forms of the present moment that creates the deep patterns of Shambhala.

MEANINGS OF PRACTICE

The simplest dictionary definition of *practice* is "to do repeatedly to acquire or polish a skill." Included in this book are practices that will increase your leadership proficiency, particulary as you engage yourself and others in new ways of thinking and doing. A *professional practice* is a vocation that is bounded by a set of responsibilities and ethics. You will also see the practice

of authentic leadership referred to this way—as a vocation and life's path. And a *community of practice* is a social network with shared interests dedicated to mutual learning. This book has grown out of an ALIA community of practice, and it provides language and frameworks that will hopefully be useful as this community continues to grow.

There is yet another shade of meaning for *practice*. In his module on "Leadership for Networked, Emergent Systems," Tom Hurley sketched the relationship between core principles and action as being like the roots and branches of a tree. The roots are embedded in our source of collective inspiration and values, and the branches express these principles in our actions, which could involve diverse projects, multiple teams, and even multiple organizations. The trunk, which joins these two, is made up of our individual and collective practices. Without practices that continually reinforce our connection with the roots, our relationships and actions will easily fall into old patterns. So practicing authentic leadership is key to bringing new ideas and more authentic, flexible, and emergent ways of organizing into the world. It is something we *do*, as opposed to something we merely believe or think about. Otherwise we are left with some good ideas layered on top of the same old ways of doing things, with no real change.

Once when ALIA board member Chris Grant was flying over Nova Scotia, en route from his home in the UK to the Summer Program in Halifax, he says that he looked down at the expanse of green and imagined wisps of smoke rising from campfires hidden in the woods below. He imagined that each campfire marked an ALIA training camp, where leaders had gathered to share their skills, learn new ones, and spar with comrades. They were developing strength and courage, and learning the practices that would sustain them during the rest of the year.

VOICES

What follows is a compilation of practices, woven together with stories from Institute faculty and friends, as well as my own experience as one of the ALIA Institute's founding members and now its executive director.

Like the Institute itself, this book is a story told in a personal voice while also being a container for many voices. I have not intended to suggest a definitive theory or framework. In fact, I suspect there may never be such a thing. The Institute is too porous and too alive to ever be completely pinned down. It is defined by the nature of its roots, rather than the shape and colour of its branches and leaves. Those roots are both ancient and current, as they tap into the wellspring of universal human goodness and aspiration.

I hope this Little Book sheds new light on the practices you already have and helps you find your way to new ones that work for you. I welcome your suggestions and stories, as we continue to grow our shared understanding of the practices that sustain authentic leadership in times of great challenge.

Arriving

The ground of authenticity is always present. When we ignore it, we are buffeted by the winds of circumstance. When we claim it, return to it, come from it, play with it, this ground supports and empowers our actions every step of the way.

As we prepare to do our work, we connect with the physical ground, or place. We also attend to the ground of our actions—how we show up, what we believe to be true, how we shape our intention, and how we frame what will unfold.

1. Place

While Nova Scotia is in many ways an east coast mirror image of my native Vancouver Island, there are also many differences. Since arriving almost 25 years ago, I have found that the spirit of this place has been soaking into my system like maritime mist. It is a place both gentle and unyielding. The people have deep ties to the land and sea, and an enduring loyalty to their stories and communities. At a recent community development conference, someone commented that Nova Scotia's long history and sea-bound coast give people a perspective that spans generations and that is naturally larger than self-interest.

At the same conference, guest pianist-facilitator Michael Jones talked about the power of place as a leadership support and partner. A special place from our youth or in our current natural environment provides a refuge we can return to, literally or in our imagination. It is also a place to "come from" as we extend into the world and the uncertainty of the future. Nova Scotia is the ALIA Institute's home, and we have found this to be an excellent place to "come from."

Jim Drescher, friend of the ALIA Institute and co-founder of Windhorse Farm on Nova Scotia's South Shore, leads silent walks through a forest that has been sustainably harvested for 150 years—the longest such experiment in Canada. For the last 18 of those years, Jim spent every winter logging this forest with horses, so as to minimize the impact on the ecosystem. As a longtime naturalist and meditator, he says that during the first years he was eager to tune in to the subtleties of the forest—the invisible energies and

secret lives of all that lived there. At some point he realized that all he really needed to do was make himself available, to "show up" and be seen rather than struggling to see. Jim now leads contemplative forest apprenticeships, in which students of forest sustainability spend 20 hours a week alone in the forest under his guidance. In recent years, ALIA board and staff retreats have all taken place at Windhorse Farm. It has become a "partner of place" and a source of inspiration and nourishment for the Institute.

Being in nature expands and refines our sensibilities. The natural world also has much to teach us about the important art of creating an optimal place for our work—what we could call sacred space.

As the world becomes ever less certain, many people are coming back to a sense of place. When we are connected to place, we have already "arrived."

What place do you enjoy returning to, physically or in your imagination? What has this place taught you? What are your favorite meeting places, and what do they have in common? What simple touches have you used or could you use to bring more life into your workplace?

MEETING IN THE DOJO

By Larry Dressler

I try to be the first to arrive in the meeting space whenever possible. Whether it is a traditional four-walled conference room, a virtual space on a conference call, or a large tent in a mountain meadow, any gathering space for me represents *awaiting*. The space awaits the people and the potential of what they might accomplish through their collaborative efforts. The physical meeting space provides comfort, establishes context, and sometimes offers inspiration for the work that's taking place within it. In that sense, the physical space in which I am working is my partner.

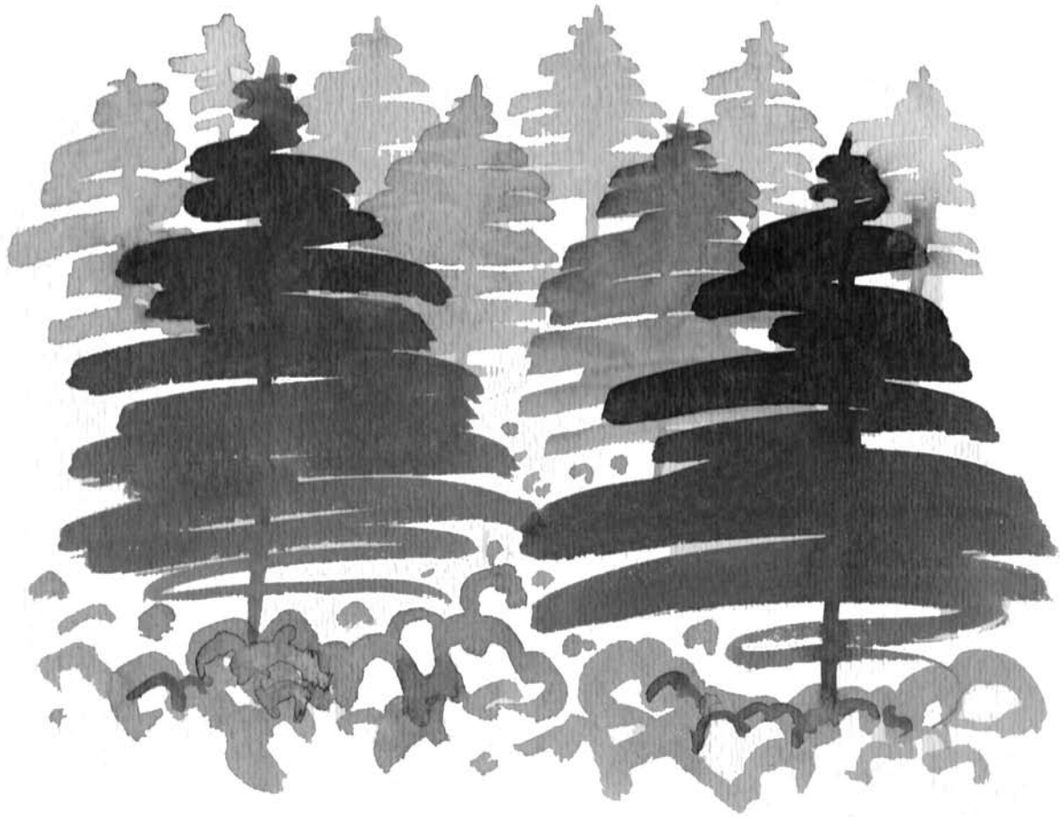
Seasoned meeting conveners invest a lot of time and effort tending to the physical space in which their gatherings take place. Many of those interviewed said that the practice of setting up the space – moving tables, arranging the circle of chairs, hanging flip charts, and so on was more than just technical set-up. It is an opportunity to establish a relationship with the physical environment and move into a state of presence….

Martial artists bow before entering and leaving the "dojo," their practice space. One function of bowing is to remind ourselves that the space in which we are working is first and foremost a place of learning and practice. When we bow into the space, we acknowledge that we are learners. This simple act transforms the physical space into a constant reminder that we must approach the work of convening with humility and curiosity about what others might teach us during the course of the meeting.

LOST

By David Wagoner

Stand still. The trees ahead and bushes beside you
Are not lost. Wherever you are is called Here,
And you must treat it as a powerful stranger,
Must ask permission to know it and be known.
The forest breathes. Listen. It answers,
I have made this place around you.
If you leave it, you may come back again, saying Here.
No two trees are the same to Raven.
No two branches are the same to Wren.
If what a tree or a bush does is lost on you,
You are surely lost. Stand still. The forest knows
Where you are. You must let it find you.



Practice

PREPARING A PLACE FOR A MEETING OR EVENT

Whenever we convene a conversation or gathering, we are creating a "clearing" in time and place. We usually don't have the luxury of controlling what that place is like, but there are things we can do to make the best of what we have. Following are some suggestions.

• As much as possible, choose a place that, in architect Christopher Alexander's words, "gives life and beauty." For example, avoid a cluttered, stuffy, disjointed, and/or barren room. Natural light, with windows on two walls, is a premium. At ALIA Programs we often uplift and enliven the space with flowers and plants.

• Pay attention to both the "container" and the space inside. The container—the shape and size of the room, the furniture, and the way the room is entered—defines and protects the space and what will take place there. A good container has an overall sense of coherence and "holding" without being too tight or constraining. This also applies to entranceways. For example, at the Summer Program we use cloth room dividers to create a buffer zone between the open public space and the main meeting hall.

• Spend time in the room before everyone arrives. After arranging everything, stand still, either alone or with co-conveners, and imagine that your presence extends to all corners of the room. Inhabit the room fully.

• Some people ceremonially purify their space before the beginning of a significant event. In North America, the indigenous people of a place are often invited to do this. Before the opening of major ALIA programs, the organizers do a short purification ceremony using juniper smoke. This gives us a sense of cleansing and empowering the space in preparation for what we are about to create with the people who arrive.

2. Framing

Frames are mental structures that shape the way we see the world. As a result, they shape the goals we seek, the plans we make, the way we act, and what counts as a good or bad outcome of our actions. In politics our frames shape our social policies and the institutions we form to carry out policies. To change our frames is to change all of this. Reframing is *social change.*

—George Lakoff

Many of our frames are unconscious. One frame that many Westerners acquire through early conditioning says that "things are solid, space is empty." From this a number of assumptions follow: We control outcomes and enact change by exerting force on tangible objects (people, things), so they behave the way we want and move where we want them to go. What we see (things) is real and knowable; the rest (space) is blank, uninteresting, possibly threatening. Power is contained in visible leadership at the apex of hierarchical structures.

These assumptions all contain truth; however there are other frames that invoke more complete truths. For example: "Things and space are both part of a dynamic, energetic, interconnected field." In fact, science now confirms that there is more space and energy than matter within our own bodies, and that the "space" beyond our planet, which used to be seen as empty and dead, is actually pulsing with energy. From this frame other assumptions follow: We influence outcomes and enact change by defining, shaping, and influencing the tangible and intangible environment. We need more than

our visual and analytical faculties to be able to understand what is going on. We are connected to each other and to other species in a web of energy and life. Nothing in the world is totally foreign; we are fundamentally at home. Power collects in certain places (e.g., the top of hierarchies, networking nodes), but it also exists everywhere and is available to everyone.

Another invisible frame says that, by nature, people are lazy and indulgent, and need external motivators and acquired self-discipline to correct for these deficiencies. In the book quoted above, George Lakoff describes how this frame leads to the "strict father" model of politics. We can also recognize this model in traditional educational and organizational environments that rely on carrot-and-stick motivation. Alternative frames, including that of the ALIA Institute, assume that people's capacity for creativity, exertion, compassion, and wisdom is more fundamental than the forces that dampen or distort this capacity. The leadership question then becomes, How do we invite ourselves and others to show up fully? How do we express more of who we are in our working lives?

Framing is a primary leadership act. By our invitations, by our presence, by how we open and close a meeting, by the questions we ask and the physical spaces we create, we are either reinforcing existing frames or establishing new ones. We are influencing how people show up and the direction that things will go.

When we encounter a frame different from our own, we can either solidify the boundary between us or be open to the possibility of creating a new, larger frame together. The ability to suspend attachment to our current frame long enough to explore these possibilities is a first step towards true dialogue, collaboration, and innovation.

A new frame or innovation needs to be incubated and protected. Otherwise, unconscious frames, forces, and habits tend to self-perpetuate and resist

change, almost as if they had a survival imperative and momentum of their own. Reframing can trigger deep-seated resistance, as the system (within and among us) tries to regain the status quo. When we are able to depersonalize these forces, and also to see our own role in perpetuating them, we have a better chance of dealing with them skillfully.

At ALIA programs we pay a lot of attention to the invisible frame, which we sometimes call the "view." We also talk about creating containers that hold, express, and protect the view in a particular time and place.

Each June we pack up our supplies and banners, and rent some room dividers, then take everything to a local university, where we set up an environment for a week-long learning community. The university layout is not ideal, but we are able to add a few touches that at least suggest the frame we are working with.

We are explicit about "arriving" and establishing a sense of "here." We define the symbolic boundaries of the university compound by marking the edges with banners and signs. This becomes our container for the week. In the orientation, we talk about the social boundaries—the schedule and the commitment to stay with one's chosen module. Within these boundaries, we invite ourselves and others to be present to, and interested in, whatever states, moods, and opinions arise: "There is no right or wrong experience here." And, "Everyone's voice is welcome here."

These cues evoke a deeper frame of trust in basic human nature and confidence in the creative, sometimes uncomfortable, messy, or chaotic process of emergent learning and action. This trust is supported by the container, which creates a sense of arriving "here," a wakeful, trustworthy place. Within this container we will create something new and alive together.

This frame is then reinforced in the first meditation session, where the practice instruction is to adopt a nonjudgmental and attentive attitude

towards thoughts ("all thoughts are welcome here") while maintaining the "boundary" of an upright posture and attention on the breath ("my body and attention have a bias towards a wakeful presence"). And finally, at the beginning of the first community activity, people enter a room that has a large open centre (a welcoming space), with seats all around the edges, in a square (the boundary that holds and frames the space). We then engage in community-building activities that take us into the middle of the room for mingling and meeting, and then back again to the edges for listening and reflection.

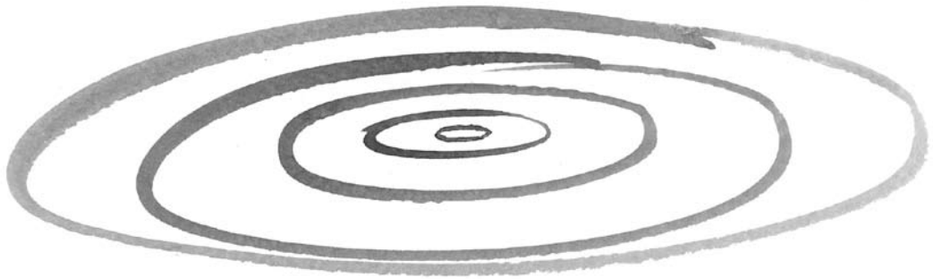
This is followed by intention setting—a personal framing. People write their intentions on coloured papers, which are then affixed to a large banner in the centre of the room. The intentions are then ceremoniously carried out and hung in a common space, as a tangible reminder through the week of our personal and collective framing.

What containers do you create or participate in? How are they framed, visibly and invisibly?

Practice

GETTING CLEAR ON PURPOSE

As process artist and host Toke Moeller says, "The purpose is the hidden leader." At the beginning of any new initiative, spend time together defining and articulating the purpose. This creates a boundary of conscious intention—you are not just acting out of momentum; you are opening a new space of creative action that is understood and held by all. The purpose then becomes a powerful organizing principle that can keep a project on track, even when complex and rapidly shifting conditions make it difficult to predict where that track will lead.



3. Attention

For over a quarter of a century, I have worked with people in all sorts of work settings to discover and deepen their connection with what matters most in their lives and to build organizations that honor and nurture that connection—something continually eroded by the never-ending fire drill that defines most professionals' daily lives….

It is no coincidence that when our lives are fragmented, our organizations and the larger social and natural systems of which they are a part suffer. The problem is that we stop paying attention. More to the point, we forget what to pay attention to.

—Peter Senge

Fragmentation is the wrong kind of complexity. It leads to suffering and stifled potential in our lives and our organizations. As we try to manage increasing work loads, information loads, and stress loads, there is always the tantalizing thought that if we could just catch up, if conditions would just shift this way or that way, we will arrive at a breakthrough. We will harness all that complexity, all that knowledge and energy and possibility. We will ride the complexity. And so we move a little faster, stretch a little further, make more connections, cover more bases. We might call this high performance. But when the economy or a competitor or a shift in the environment or our own overstretched capacity takes the wind out of our sails, we suddenly discover how vulnerable we have become. We have depleted our reserves, in every sense.

How do we avoid this kind of fragmentation in ourselves and our organizations? How to establish a different, more dependable and stable ground for the demands of our leadership and our work? In the late 1990s Peter Senge first became interested in the experiment that was to become the ALIA Institute because he had already discovered the importance of these questions. He knew that leaders couldn't create thriving, adaptive, sustainable, and responsible organizations while being driven by a "never-ending fire drill" of reactivity. At the same time, leaders couldn't just retreat. Complexity was and continues to be an increasing fact of life.

In the 1990s, efforts to reframe how people think about organizations were well under way on a number of fronts, from the analytical systems dynamics and complexity science models to the more intuitive living systems and self-organizing frameworks. All these new frameworks acknowledged the complex and interconnected nature of systems, and all suggested a different way of paying attention.

Attention is one of our most valuable resources, and yet strangely we seldom pay attention to how we pay attention, unless we happen to be a meditator or a neuroscientist. These two perspectives are now beginning to "meet in the middle," as Western meditators mature in their understanding and scientists expand their knowledge of how the brain functions.

For example, in *Your Brain at Work,* David Rock translates findings from neuroscience to leadership and management, and then draws parallels to the practice of mindfulness meditation. According to Rock, "Originally an ancient Buddhist concept, mindfulness is used by scientists today to define the experience of paying close attention, to the present, in an open and accepting way.... To neuroscientists, mindfulness has little to do with spirituality, religion, or any particular type of meditation. It's a trait that everyone has to some degree, which can be developed in many ways.... Mindfulness

also turns out to be important for workplace effectiveness. When you listen to a hunch that you need to stop emailing and think about how to plan your day better, you're being mindful. When you notice that you need to focus so you don't get lost driving to a meeting, you're being mindful."

Recent neuroscience research has further confirmed what meditators have known for millennia: that there are two fundamentally different ways of interacting with the environment. One is centered in a self-referential process ("ego" or "me" or "personality"), which neuroscience calls the "narrative circuit"—it is the brain circuitry and information storehouse that holds together a personal narrative based on past experience, which then acts as a filter and interpreter for what is happening in the present. The other is called "direct experience" by both scientists and meditators. In this case, several different brain regions become more active and you are able to experience sensory information in real time. You are not just overlaying the experiences of the past onto the situation of the present.

Mindfulness not only allows you to notice the difference between these two modes, but also gives you the choice of which circuitry to be using. Further, the more you switch over to direct experience, the "thicker" and stronger this circuitry becomes.

Now stepping outside the framework of neuroscience and into our everyday experience, we can also say that direct experience heals fragmentation. We get out of our "head" and into the mind-body system that is already connected to the larger energetic system of the environment. We reconnect with a wholeness that has been in the background. We draw from a larger energetic field, and we become more attuned to the subtle signals within and around us.

A traditional Buddhist metaphor for our usual thinking mind is that of a monkey trapped inside a house. The monkey keeps running from window to window, which represent the senses. Obviously the monkey doesn't have

a very complete or integrated view of the world outside. Nor is there a lot of freedom in this monkey's world.

MIT researcher C. Otto Scharmer also describes the limited, narrative mind as being enclosed in a "me" bubble, which could also be "my organization." Scharmer describes a movement of attention from the middle to the edge of the boundary, where you begin to look outward from the periphery of your boundaries; and then a movement to outside the boundary, where it is possible to see directly what is outside. Finally, he describes *presence* as an orientation that comes from the space, or the "field," itself. Scharmer then concludes, "Depending on the source of attention and awareness we operate from, we effect and facilitate different social dynamics and patterns. 'I attend *this* way — therefore things emerge *that* way.'" In other words, the result we get depends on the type of attention, or awareness, we employ.

Mindfulness is a leadership practice that we can return to over and over, every day. The more we do it, the more likely we will reconnect with mindfulness in the midst of chaos, pressure, and conflict—in other words, at the times when we most need to be present and when we are most likely to have defaulted into a habitual pattern of response. Moreover, we will be cultivating the capacity to be fully present to the richness and depth of our lives.

At ALIA programs we often incorporate mindfulness practices—not as an optional component but within the formal schedule, as part of our preparation for new learning and whole-person engagement. Sometimes this takes the form of sitting or walking meditation, sometimes mind-body exercises, and sometimes practices originating in the contemplative or martial arts.

What daily rituals do you have (or could you have) to bring you back to mindfulness? What do you do when you need to "get out of your head"? When did a shift in attention lead to breakthrough thinking for you or your team?

STANDING AT THE CENTER OF THE WORLD

By Pema Chödrön

In many traditions, including Tibetan Buddhism, the circle is a powerful symbol for the sacredness of all things. Throughout these traditions, there are rituals in which the image of the circle is used like this: by drawing a circle around yourself and standing the middle of it, you realize that you are always at the center of the universe. The circle that surrounds you shows you that you're always in the sacred space.

In Buddhism we talk about mindfulness and awareness. We're taught mindfulness through oryoki [a mindful eating practice that originated in Zen monasteries], through bowing, and through being with the breath, labeling our thoughts "thinking." There's a lot of precision but also a lot of gentleness. Along with being very precise about our world, there's also always space around us that is called gentleness: we allow ourselves to experience how large and fluid and full of color and energy our world is. That space is our circle.

When we talk about mindfulness and awareness, we're not talking about something stern, a discipline that we impose on ourselves so that we can clean up our act and be better and stand up straighter and smell nicer. It's more that we practice some sense of loving-kindness toward microphones and oryoki bowls and our hands and each other and this room and all the doors we go in and out of. Mindfulness is loving all the details of our lives, and awareness is the natural thing that happens: life begins to open up, and you realize that you're always standing at the center of the world.

Practices

MINDFULNESS MEDITATION

A daily meditation practice can begin with ten minutes each day.

1. Posture
Take your seat on a chair with feet flat on the floor or on a cushion with legs loosely crossed. The posture is upright, relaxed, and dignified. Hands rest on thighs, palms down. Eyes are open, with a soft gaze directed slightly downward.

2. Attitude
Having established the posture, feel the solidity of the earth and the spaciousness of the room (or sky) above and all around. Set an intention to follow the instructions for the determined length of time. Be attentive but not heavy-handed.

3. Breath
Breathing normally, let your attention rest on the out-breath. The breath goes out and dissolves; the in-breath happens by itself.

4. Letting go
Thoughts arise on their own accord. Let them come and go. When you notice you have been lost in thought, mentally label that "thinking" and bring your attention back to the next out-breath.

5. Not too tight, not too loose
Continue, maintaining a sense of upright but relaxed posture and attention on the out-breath.

MINDFULNESS ON THE RUN

Think of something you do many times each day. For a nurse it could be opening a door. For a lawyer it could be answering the phone. Turn this into your mindfulness cue. Every time you do this action, come back. In that moment, shift your attention from the momentum of thought and action to the physical sensation of turning the door handle or picking up the phone. Let everything else drop and just notice any tightness in your mind and body in that moment.

TWENTY-MINUTE DANCE

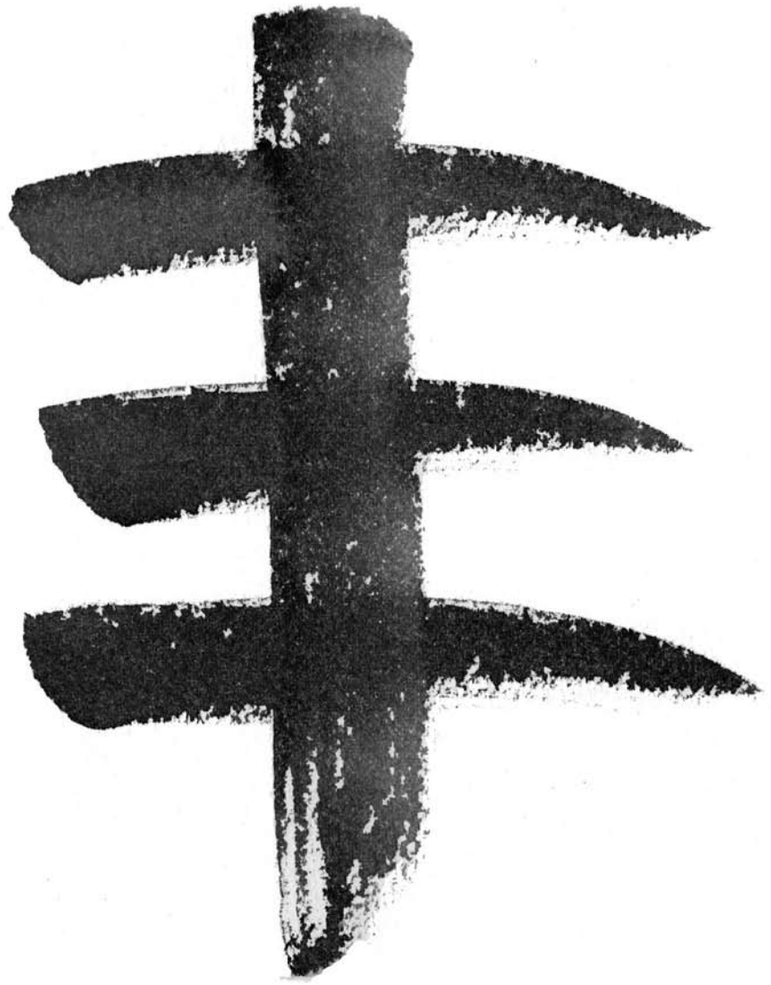
Any physical activity, such as yoga, running, sports, or dance, help reconnect mind and body. The following exercise is often introduced by Arawana Hayashi in ALIA Institute's creative process workshops, as well as in Presencing modules.

While this is a solo exercise, it can be done either alone or in a group. The whole point is simply to be with the body. There are no right or wrong movements. We aren't trying to achieve anything artistic or even interesting. It is as if no one is watching, not even ourselves.

Ensure that you have privacy in a room with a clean floor, and begin by lying down. You may want to close your eyes, but it isn't necessary. Over the course of twenty minutes you will gradually transition from lying to standing to walking. There are two possibilities: moving and making a shape. Start by just relaxing and feeling any sensations in your body. Notice that your body is making a shape. When you are ready, move into a different shape. Stay with the sensation of moving until you arrive at your new shape. Then rest in that shape, paying attention to the body. Continue on, gradually transitioning from lying shapes to standing shapes. Then walk around the room between shapes, with eyes open but downcast. It is up to you how long you want to stay at each level: lying, standing, and walking.

After you have practiced this a few times, you may want to coordinate with the breath. Breathe out as you move; breathe in while taking a shape. To accentuate this rhythm, breathe out through the mouth, making a light hissing sound.

Do this at the beginning of your day. Then, whenever you remember throughout the day, just come back to being with the sensations of the body—as you walk, sit, stand, wherever you are.



4. Alignment

There is a natural order and harmony to this world, which we can discover. But we cannot just study that order scientifically or measure it mathematically. We have to feel it—in our bones, in our hearts, in our minds.

—Chögyam Trungpa

One of the underlying principles that informs the ALIA Institute's approach to leadership comes from the Shambhala notion of "joining heaven and earth." In fact, in traditional Chinese philosophy, that is a widely understood definition of the leader's role. In the same text quoted above, Chögyam Trungpa explains: "The principle of heaven represents any lofty ideal or experience of vastness and sacredness. The grandeur and vision of heaven are what inspire human goodness and creativity. Earth, on the other hand, symbolizes practicality and receptivity. It is the ground that supports and promotes life.... The Chinese character for the ruler, or king, is a vertical line joining three horizontal lines, which represent heaven, earth, and man." This description "expresses the view of how human life and society could be integrated with the order of the natural world."

This may sound esoteric. At the same time, like mindfulness, these concepts echo leadership principles we are already familiar with. If we think of "heaven" as vision and possibility, and "earth" as the resources and constraints of current realty, we can easily see that the leader's job is to align these two. And by doing so, people, purpose, and action also come into alignment.

What may be less familiar is that this joining and alignment can be practiced throughout all aspects of one's work and life. When we are mindful and fully present, we can attend to the details of "earth" at the same time that we are connecting to a bigger space of "heaven." There is context around the details.

Joining heaven and earth also takes place in our physical system. When we stand between the solid, grounded, weighty quality of earth and the uplifted, open, spacious quality of heaven, we are expressing our place within the natural order. We are connecting with the dignity, strength, and "lofty ideal" of our stewardship role as human beings. This is why an upright, dignified posture is stressed as a foundation for meditation practice and for martial arts such as Aikido. This posture is conducive to "coming back" to awareness and to an alert, synchronized frame of body-mind. The posture is grounded (earth) while also connected to something bigger than oneself (heaven). We aren't stuck in the details and defined by reactivity; nor are we lost in the clouds of idealism or wishful thinking. We are poised to work with the dynamics and forces of the world, rather than being either oblivious or overwhelmed.

At the ALIA Institute, the art of joining heaven and earth is introduced through meditation, brush calligraphy (Barbara Bash), Aikido (Bob Wing, Wendy Palmer), as well as other arts.

As Wendy Palmer often reminds us, because we can always come back to a ground of awareness and authenticity, as leaders we don't have to invest a lot of time trying to improve or fix our personality. Nor do we have to be heavy-handed, critical, or in denial about certain aspects of ourselves. In fact, these self-controlling tendencies generally accomplish little other than to create internal struggle and dissipate our attention and energy—tendencies that we then unwittingly project onto others.

In other words, the practices of mindfulness, joining heaven and earth, and centering are not just another set of self-help techniques. There are countless self-help books on the market, and probably many on your own bookshelf (in fact, Wendy Palmer calls these books "shelf help," because that's where their wisdom often remains). While they can be useful, the very idea of self-help can reinforce an underlying assumption that we have to fix something in ourselves in order to become a better person and a more effective leader. Once again, there may be some truth in this, but there is a bigger frame that leads to different results.

Think of it this way. Most of us know when we are "on" and when we are "off." Being "on" is a present, perceptive, generous, accurate state. Being "off" is… you fill in the blank. We are usually painfully aware of our personal version of "off." Wendy talks about personality as having understandable tendencies to be preoccupied with issues of safety, approval, and control. In fact, our personality is so busy managing these issues that it misses or distorts a lot of what is going on. It has difficulty just being present.

In contrast, the great Buddhist teachers I've met radiate a palpable, sometimes mind-stopping presence that can fill a room. Traditionally this presence is called compassion, and indeed I have felt completely disarmed, softened, and opened simply by walking into such a room. At the same time, in a strange way there's nothing personal going on, and the whole thing is very ordinary. The teacher may smile at you, engage, or not. Either way, any attempts to be noticed, to be liked, to impress, or to be appropriately humble or spiritual, all just hang in the space for all to see. It's very exposing. And yet, there's no judgment—just a sense of something bigger, more playful, and more powerful going on than my personality. The space becomes a mirror of the smallness of my usual attempts to manage and control.

Having experienced such examples has been an inspiration for my own journey. I have also discovered that this journey is never-ending. We come back, we lose it, we come back, we get distracted or overwhelmed, but underneath there is an attraction and commitment to coming back. All of that—the on, the off, the yearning, the disappointment, the smile of recognition that we will never completely "get it right"—is part of the terrain.

The ALIA artists also remind us that we can enjoy ourselves along the way. Character actress Lanny Harrison and theatre artist Steve Clorfeine lead exercises that loosen up a fixed or serious sense of ourselves. By taking on different characters and qualities, and miming the gestures and movements of someone else, we stretch our sense of identity and free up our playfulness and creativity.

As Pema Chödrön says, we are always standing at the centre of our world. As leaders and stewards, we have an ongoing sense of this—we are scanning, listening, monitoring, tending. But sometimes we feel pulled in too many directions at once, or spread too thin, or caught up in putting out fires or getting lost in so much detail that we lose track of the whole picture. Sometimes our ego or personality gets caught in trying to secure our territory and manage our world. We come back. To what? We come back to an uplifted posture and a 360-degree world. We join heaven and earth, and from there "life begins to open up."

With your posture, exaggerate the sensation of earth, weight, gravity, detail, concreteness, then do the same for heaven, space, possibility, abstraction. Which extreme is more familiar? As a leader, how do you regain alignment when you get lost in one extreme or the other?

CAUGHT IN THE STORM

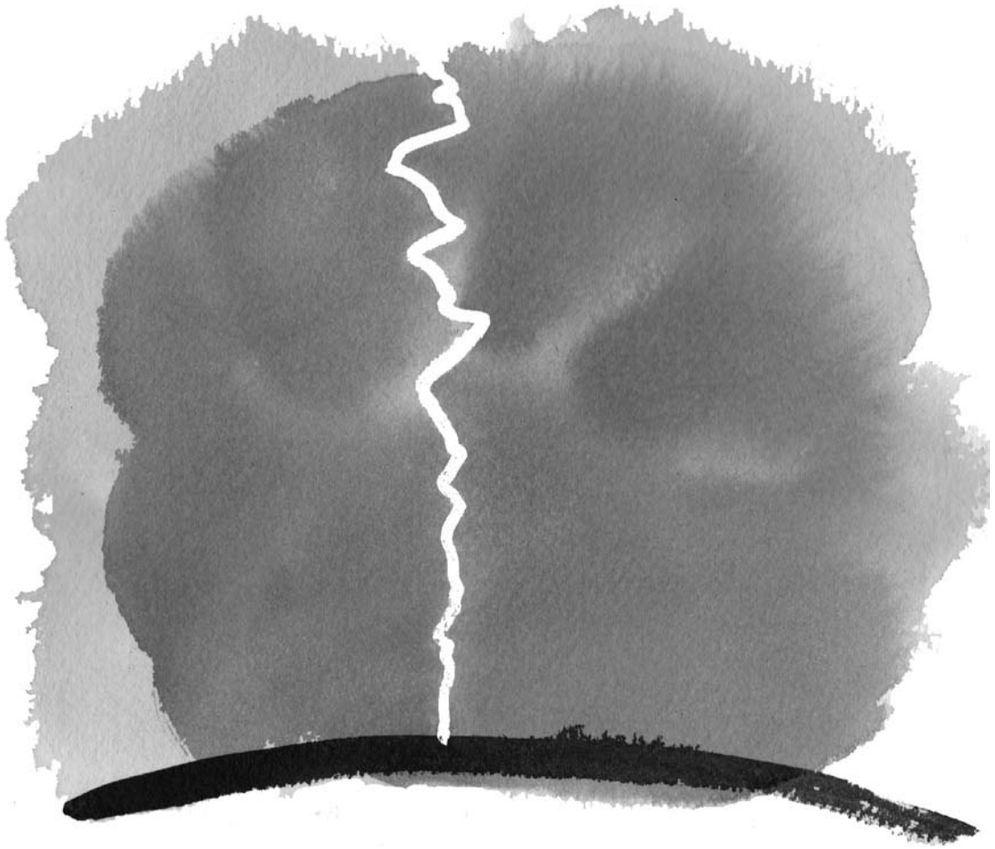
In June 2007, a Summer Program faculty retreat took place in the coastal town of Lunenburg, Nova Scotia. We met in a large room in an historic inn perched on a hillside facing the harbour. I vividly remember the initial check-in circle. Along the opposite wall from where I sat, windows looked out to sea and a darkening sky. A storm was approaching, and I was on edge because I knew that down at the wharf a group of young people was about to head out on an ALIA "Leadership at Sea" pre-program adventure in a very small sailboat. A talking piece was being passed, as people introduced themselves in turn and talked about what they were bringing to this gathering. It was a large circle that filled the room—about forty people in all.

I was also on edge because the atmosphere inside the room was increasingly potent, as this impressive group of people spoke from the depths of their intention. Soon the person beside me was speaking and I realized I didn't have a clue what I would say. The stone was passed into my hands and all eyes turned to me. I looked blankly around and said something about being happy about having a faculty retreat because it gave me a chance to warm up before the intensity of the program itself. What an odd thing to say, I thought. Then I said this: "Part of the reason the program is so intense is because the need in the world is so great. It is as if dark clouds are gathering. If one really stands on a ground of intention right now, it attracts a lot of energy. So it is good not to be standing alone. Who are the people who are ready to stand together on this place? Who will be the lightning rods for these dark times?" I passed the stone.

To my surprise, further around the circle Marianne Knuth struck the cymbals she was holding, to signal a moment of silence while the group absorbed my question. I was as surprised by the question, and the response,

as anyone else. After a few moments, the stone continued to pass, until it arrived at Michael Chender, who was about to lead a ceremony to purify the space and "invite good energies" for the rest of our retreat. At the exact moment Michael finished his preamble, thunder exploded across the sea and sky, and lightning lit up the room.

I later learned that the group of young adventurers had made it as far as an island not far from the Lunenburg shore, and at that same moment were sitting in a row on a rubber lightning-proof sheet spread out on the beach, in a torrential downpour. Some had arrived from distant parts of the world just hours before. Luckily they wouldn't literally "stand on this place" of joining heaven and earth on that electrifying afternoon.



Practices

CENTERING

Wendy Palmer has developed exercises that help us let go of tightness and struggle, get collected, and realign up and down. We can come back to simplicity, to precision, to an uplifted posture. Following is her description of a standing centering practice that can be done in any context throughout the day.

Take a moment to stop and refresh yourself. Using your breath, recover a dignified, upright posture. Inhale up the back, lengthening the back of the neck. Exhale slowly down your front, softening your chest and shoulders. Inhale up, lengthening your spine, and then allow your exhale to spiral down the front and into the earth. Bring attention to the pelvis, shifting the weight slightly forward and sensing the strength and stability. From this dignified posture, expand your awareness out to fill the room. Take some time to appreciate the presence and sensation of the energy around you — behind and in front, to the left and right, and above and below.

PARTNER CENTERING

This exercise, also from Wendy Palmer, helps us see how we respond to pressure and gives us a way to practice shifting from a survival reflex to an orientation that is naturally more open and expansive.

Work with a partner, standing facing each other, with one foot forward.

Both you and your partner put your hands out, palms up. Your partner grasps you under the wrists and pushes forward, applying steady pressure.

Simply hold that posture and observe your pattern of response. Notice if there is tension in your head and neck, in your chest and arms, in your hips and legs. Notice the boundary you activated between you and your partner.

With your partner still pushing, recover a dignified vertical posture. Extend your arms out with fingers pointing to the far wall. Extend your awareness out—back, front, left and right—including your partner.

Relax your arms without bending them. Let them get heavy.

Put your attention on the space between you and your partner, behind you, and the space behind your partner. Your message is, "We are in this together." You are now sharing the same space rather than controlling the boundary.

Ask for more pressure if you feel like it and notice how the space becomes a shock absorber. You can remain open and relaxed in the midst of the pressure.

Embarking

Before rushing down well-worn paths, we take the time to see the situation freshly, establish the living pattern of our project or campaign, and design the stages of emergent action.

In this way, we embark on an explorer's journey, a hero's journey, and we create the road and adjust the map as we go. We dare to ask real questions as we broaden the field of engagement. We risk small certainties for bigger success.

5. Just Noticing, Simply Asking

Either you look and see beyond language—as first perception—or you see the world through the filter of your thoughts, by talking to yourself. Synchronizing mind and body is looking and seeing directly beyond language.

—Chögyam Trungpa

A heron stands stock-still at the edge of a pool, gazing into the water. It does not seem to be looking for fish, and yet the moment a fish moves it dives. Kuan *is, then, simply to observe silently, openly, and without seeking any particular result. It signifies a mode of observation in which there is no duality of seer and seen; there is simply the seeing. Watching thus, the heron is all pool.*

—Alan Watts

The limiting factor of transformational change is not a lack of vision or ideas, but an inability to sense—that is, to see deeply, sharply, and collectively.

—C. Otto Scharmer

I am still able to vividly recall a diagram from my elementary school years depicting how the eye sees. It is a line drawing of a cross-section of an eyeball, with intersecting rays of light entering the eye, to show how the lens reverses the image that is seen. An upside-down image of a tree appears on the "screen" inside the eye. And then beside this drawing is another one, of a box camera (and I actually had one of these), showing the very same

phenomenon, with an image reversed on the film inside. The text below then explains how the brain, like the camera, receives the image of the tree and is thus able to make sense of an external, objective world.

I would like to say that I now have a much more sophisticated understanding of perception, but sadly the camera image still tends to frame my deep-level operating assumptions. This is in spite of new information from neuroscience, which tells us that there is ten times as much brain activity "interpreting" sensory data than there is engaged in simply taking in and recognizing that information. Even after we have noted the light and colour, and identified the pattern as "tree" we then download ten times more information onto that image. We fit it into a context of memory and association, like and dislike, and anything else that establishes its relevance and usefulness to "me." In other words, we create our world as we go, based on downloads from the past and what our personality hopes to get out of the present and the future. How often do we simply "see" a tree? Or as meditation teacher Joseph Goldstein says, once the Big Dipper has been pointed out to us, can we possibly look into a starry night sky and *not* see it?

I had a glimmer of this dilemma when reading books by Alan Watts in the 1970s. And then in 1991 I was documenting a Naropa Institute dialogue on Deep Ecology when a presentation by cognitive scientist Francisco Varela on the perception of colour turned that glimmer into a sense of vertigo. Varela led us through his research in a way that brought me closer to realizing that there truly isn't an independent, objective world "out there." How I see the woods outside my window has nothing to do with the way a bird perceives light, colour, and form and makes sense of those same woods. Even within my own species, there is no way of knowing if someone else's "green" is the same as my green.

Nevertheless, in our everyday world, we think there is one world that we

are all seeing together, even as we individually and collectively create that world. If our expertise involves hammers, we see a world of nails. If we see something that doesn't fit our preconceived patterns and assumptions, we simply don't recognize it.

Otto Scharmer tells a story of being shocked by the collapse of the Berlin Wall, even though it happened soon after first-hand conversations he'd had with researchers and activists who predicted this event based on their concrete evidence. He recalls, "There I was, twenty-seven years old and exposed to fresh evidence that the Eastern European socialist system was about to collapse. Yet in my mind I was *unable to recognize* what I had seen with my own eyes.… The primary difference between me, the student, and Galtung, the master researcher, wasn't the amount of knowledge accumulated but a different way of seeing. He had a more disciplined way of *paying attention* to the world. He was able to *suspend* his habitual judgment and pay undistorted attention to the reality in front of him." (*Theory U,* p. 120)

As leaders, it is critical that we develop our capacity to suspend at least some of our limiting filters and assumptions, so that we can see our organizational and societal landscape as clearly as possible, track emerging trends and patterns, and anticipate the beginning and end of cycles. "Seeing," like "listening," can be both a literal sensory practice, as well as one that transfers to a larger capacity involving all our senses and ways of perceiving.

We can also use our understanding of the sense-making process to guide people and groups towards larger, more useful re-framings. Two schools of coaching that have been represented at the ALIA Institute, Newfield (Julio Olalla) and New Ventures West (James Flaherty, Sarita Chawla), have been directly influenced by the "Chilean School" of philosopher-scientists that included Francisco Varela and Humberto Maturana, and which later influenced Fernando Flores. In their book *The Tree of Knowledge,* Varela and

Maturana call the process of creating consensual reality "autopoesis," and Flores was particularly interested in how this process can be influenced through language and the distinctions we make. In addition, Otto Scharmer incorporated aspects of Varela's work in the development of Theory U. Varela himself, who was also a long-time student of Buddhism, was scheduled to present at the first Shambhala Summer Program, but succumbed to complications from a liver transplant just weeks before.

In the 1970s and '80s, Chögyam Trungpa worked with performing and visual artists to create a new synthesis of contemplative perception, Taoist principles of heaven and earth, and Western art forms, in a body of teachings called Dharma Art. The ALIA Institute's core team of Shambhala artists were students of these teachings and now apply their insights to the practice of "first perception" and synchronizing mind and body as a way of "looking and seeing directly beyond language."

Seeing clearly is an important aspect of the first phase of any project, which Otto Scharmer calls the "sensing" phase. We suspend our preconceptions and immerse ourselves in the system we wish to understand and influence. We also invite multiple viewpoints, from all parts of the systems, and diversity and divergence are allies in this phase.

Collective sensing is often framed by an open-ended question, which invites curiosity and exploration rather than reactive problem-solving. In the words of Margaret (Meg) Wheatley, "There is no greater power than a community discovering what it cares about. Ask 'What's possible?' not 'What's wrong?'"

Under what conditions do you more often see your environment (including other people) freshly and clearly? What "sensing tools" do you use to see what is going on in a system (marketplace, community, organization, team, family)?

Practices

LISTENING

Throughout your day, use sound as a way of coming back to mindfulness and 360-degree awareness. When you find yourself caught up or distracted, take a break. Bring your attention to whatever sounds you hear. Suspend the impulse to label, interpret or judge; just let the sounds be. Notice when you lose track of the sounds, and simply come back to listening.

CONTEMPLATIVE PHOTOGRAPHY

Go on walks with your camera and practice "just noticing" colour. Walk with relaxed awareness, suspending the tendency to label and interpret what you see. Instead of "things" notice the subtleties and vividness of the different colours around you. Occasionally stop to frame a "first perception" through your camera's viewfinder. Frame the colour(s), not the things, and capture the image. Review your images back home. Do the same for light and texture. Do this exercise in familiar places to begin with, rather than those that you think of as "scenic" or "exotic."

ASKING POWERFUL QUESTIONS

Finding the right question can be key to the success of a strategic conversation. A good question is immediately relevant, open-ended, and leads towards new thinking and new knowledge. Advice from the World Café website:

As we have worked with groups over the years we have asked hundreds of people what makes a powerful question. Several themes have emerged. A powerful question

- is simple and clear
- is thought provoking
- generates energy
- focuses inquiry
- surfaces assumptions
- opens new possibilities
- invites deeper reflection
- seeks what is useful

THE WORLD CAFÉ

Use the World Café format to move from divergent thinking framed by "powerful questions" to collective sense-making. Because it is simple to practice and built on an existing social pattern of having "conversations that matter" around café (or kitchen) tables, the World Café has spread virally to countless contexts in many part of the world. The World Café was brought to Nova Scotia and the Shambhala Summer Program by co-founders Juanita Brown and David Isaacs in June 2001 and has been integrated into the design of ALIA projects, programs, and conversations ever since.

DIALOGUE INTERVIEWS

Find out what's going on in a system by conducting in-depth interviews with diverse stakeholders. Practice "generative listening" and suspend judgment while asking the interviewee about his or her challenges and perspectives. Try to see through the other person's experience. Dialogue interviews are part of the "sensing" stage of Theory U, as practiced by the Presencing Institute (founded by Otto Scharmer) and Reos Partners (founded by LeAnne Grillo, Adam Kahane, Marianne Knuth and others). At the Summer Program, participants in Reos's Change Lab module conduct dialogue interviews in the local community, as part of their development of a shared understanding of a local social challenge.

APPRECIATIVE INQUIRY

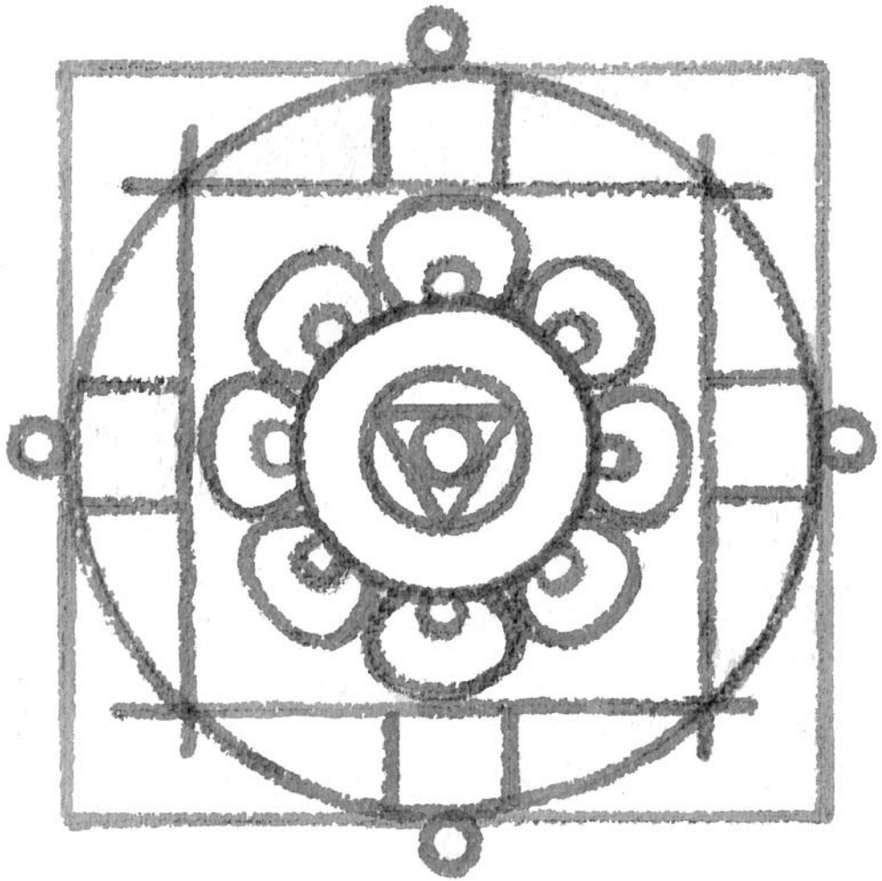
Use inquiry to sidestep the problem-solving impulse and notice together what *is* working and where there is energy and aliveness. Follow that energy.

ASSET-BASED COMMUNITY DEVELOPMENT

In community development, change the lens from needs and deficits to strengths and assets. Notice, map, and build on those strengths.

SCENARIO PLANNING

Based on everything you see taking place in the present, forecast different scenarios for five, ten, or twenty years into the future. Tell the story of how each scenario will likely unfold. Then, as events do unfold, watch for signs and patterns that indicate which scenario is being played out and therefore what decisions need to be made in the present.



6. Relationships that Hold

Elrond: "Nine companions. So be it. You shall be the fellowship of the ring."
Pippin: "Great! Where are we going?"
—Fellowship of the Ring, Lord of the Rings

During the second Summer Program I visited Toke Moeller and Marianne Knuth's module on "The Art of Hosting Strategic Conversations." I was in awe at the way Toke and Marianne worked together to create a warm and creative space for learning and collaborating. It was there that I first began to realize that there was an entirely different way to think about hosting learning events—even a large event like the Summer Program. Others at the Institute, such as Sera Thompson and Claudia Chender, were also making connections with Toke, Marianne, Tim Merry, and others in the "Art of Hosting" network, and the Institute soon began to incorporate elements of this field of practice.

In retrospect, my first frame for understanding the hosting role had been influenced by the usual conference model, where an emcee moves people through an agenda. In that frame, the events are discrete "things," like beads on a string, and the space between the beads is simply a transition zone to manage. Success means that the schedule is on time and the people have found their next destination. My own experience was that being responsible for this time/people management was exhausting and depleting, and I discovered that Toke had come to a similar conclusion after an early career as a conference organizer.

The Art of Hosting comes out of a frame that views a gathering or event as a living, energetic field. The hosts, who usually work as a team, "hold the field" as it moves through its process or journey. In other words, they are tuned in, sensing what is going on, holding an attitude of service to what is needed, and making adjustments as they go along. As much as possible they are also embodying, personally and together, the qualities of presence, inclusion, courage, and joy that are signs of a vibrant community of leadership and learning.

All of this requires a certain kind of training and rigorous effort. It also requires a level of trust and connection within the hosting team itself. Preparing to work together in this way involves building a relationship field. An Art of Hosting slogan reminds us, "It takes a field to hold a field."

These same principles apply at any level of scale and in any context. By now most people have heard these sage words from Margaret Mead: "Never doubt that a small group of thoughtful, committed citizens can change the world. Indeed, it is the only thing that ever has." A small group or team that is paying attention to its own field with clarity of intention and commitment has the capacity to host conversations and change processes with ever-widening circles of people.

Complex, multi-stakeholder innovations using the U Process also follow this principle. One of the first steps is to establish a core group that then holds the centre for the rest of the project. From the Theory U executive summary: "At the beginning of each project, one or a few key individuals gather together with the intention of making a difference in a situation that really matters to them and to their communities. As they coalesce into a core group, they maintain a common intention around their purpose, the people they want to involve, and the process they want to use. The context that allows such a core group to form is a process of deep listening—listening to what life calls you and others to do."

Although people may associate such a core group with patterns of self-organizing and flattened hierarchy, I would suggest that it is still a form of hierarchy. In fact, I am reminded of an often-misunderstood image associated with Tibetan Buddhism—that of *mandala*, which Chögyam Trungpa translated as "society." Pictures of traditional mandalas show a circle with a central figure, which depicts an aspect of enlightened mind. Sometimes this figure is peaceful, sometimes fiery or even fierce. In a Shambhala mandala, the central figure is an enlightened king. This is the organizing principle, or the leadership principle, for the entire mandala. You could say that mandala is a picture of a centre-out rather than top-down hierarchy. More accurately, centre and surroundings are expressions of each other, within one interconnected field.

In an enlightened mandala, the central figure is totally awake. In fact, the figure is wakefulness personified. The rest of the mandala is a colourful display of beings and activities, which are also awake. Altogether the mandala is a picture of a dynamic, colourful, enlightened world.

Whether it is an individual or a team at the centre of the mandala is not so important. In either case, if the person or group is mindful, grounded in authenticity, open to possibility, and vertically aligned around purpose and principles, the project can evolve with dynamic coherence. These are conditions for authentic leadership and for a magnetic invitation to others.

At the ALIA Institute we have been seeing this pattern unfold in a coastal community project we are engaged in along with several other Nova Scotian partners. In that project, a circle of diverse grassroots leaders is building the trust and coherence needed to engage the larger community in strategic conversations. Coherence doesn't mean that everyone must agree; in fact this has been one of the group's break-through realizations. Long-standing differences can surface and co-exist once a deeper ground

of authentic communication has been established. From that ground the group can discover a shared purpose that is larger than that of any one interest group. Another realization has been that, by contrast, many well-intentioned community projects are doomed to failure if they do not begin by building this pattern of trust, alignment, and intention among a core group that stewards the project's centre. Often, in the rush to act and meet targets and deadlines, this critical first step is overlooked. A "magnetic field" isn't created, and while people go through the motions, meet deadlines, and document outcomes, nothing actually moves.

Another discovery at the Institute has been the importance of setting an intergenerational pattern at the centre of any project. We have practiced this on our own board, as well as in faculty teams, facilitation teams, and in the program community itself. Having experienced genuine intergenerational community and collaboration, I find that anything else seems lopsided, lacking in the mix of perspectives and dynamics needed to move forward in a robust way. Those who have continued to hold and champion the intergenerational thread at the ALIA Institute include Juanita Brown, Claudia Chender, Mary Stacey, Bob Stilger, and Hélène de Villiers.

When have you experienced working within a "magnetic field" stewarded and hosted by a core team? How have you managed the dynamic balance between inclusion and honoring the "natural affinities" and "natural hierarchies" of situations?

CRUCIBLE OF HEALING

In 2003, the Fetzer Institute co-sponsored a Healing Conflict Dialogue that took place before and during the Summer Program. Ten people came together for this behind-the-scenes dialogue, representing conflict hot spots from around the world. Bob Ziegler, Judy Brown, and I talked about how this rich conversation could be brought out into the larger program community through a ninety-minute plenary session on Thursday, the second-to-last day, after lunch. Peter Senge happened to be visiting that day, so we would also involve him and Meg Wheatley, our two highest-profile presenters.

Bob and I decided that we would invite of couple of the most articulate members of the Dialogue group to share insights with the program community, on the group's behalf. This would frame a Café conversation on "healing conflict" and Meg and Peter would offer their reflections at the end. The plan was set, the two group members taken aside and prepped, and the logistics team informed.

Thursday arrived and we decided to bring all the players together for lunch, including Meg and Peter. We went through a round of introductions, then I described the plan, which was outlined on a flip chart. There was a moment of silence, and then a gentleman at the other end of the long lunch table looked directly at me and asked softly, "Who made these decisions?" All eyes turned to him and then to me. In an instant I recognized that the group was unified in silent agreement. They had all had enough experience of others managing their lives and their stories. This wasn't going to work.

I looked at the clock. It was a half hour before we were "on." Before panic could fully take hold, I turned the flipchart page and asked, "How would you like to do this? How would you like to share the story of your conversation?"

Within twenty minutes they had it. Someone ran to the plenary room to

ask that the stage be rearranged. The group would all sit at the front, the chairs barely fitting side by side across the stage. They would each introduce themselves, so that all voices were heard. Then they would invite two pairs to tell their stories, taking as much time as they needed. They decided that one pair would be two men: an Israeli and Palestinian who had each been victims of terrorist activity, and who both described themselves as "victims of victims." In their homeland, they were now working across the divide to heal the trauma that bred more violence. The other pair was a young black woman and a white middle-aged South African man who had been President de Klerk's Chief of Staff in the final years of Apartheid.

In both cases the pairs told their personal stories, which were still tinged with the emotions of trauma, then turned and spoke to the other with words of remorse and forgiveness. The room was charged. For those present, it was one of the most remembered conversations at the Summer Program. Meg and Peter never did speak, nor did they mind.

One of the people in the audience, Whit Jones, later approached the Israeli, Yitzhak Mendelsohn, and the Palestinian, Zoughbi Zoughbi, and together these three founded the Centre for Emerging Futures, which is still active today. From the website: "The dream began in Halifax, Nova Scotia, when three men met…. Through conversation they dreamed together the possibility of breaking the cycle perpetuated from decades of chaos and tragedy between Israelis and Palestinians…. The Middle East Project has since become a reality. Individuals from Palestine and Israel, and around the world, have begun to convene to create the partnerships that will take a variety of initiatives forward."

Two enduring lessons for me: (1) Don't make grand designs and plans for people who aren't in the room and (2) Never underestimate the power, intelligence, and leadership of a group that has created a strong field of trust and intention.

Practices

HOSTING A CHECK-IN

A check-in is a simple way to cultivate a relationship field among people who are about to do some work together. It takes place at the beginning of a meeting or event, allowing people to arrive more completely. A check-in provides a transition space, slows momentum, and invites each person to bring more of themselves into the group, beyond their position or role. It establishes a sense of inclusion and trust, and also gives everyone more information about what issues, expectations, or problems might be "in the room" that will influence upcoming dialogue and decisions.

Similarly, the check-out invites all the voices back into the circle, in preparation for closing and transitioning out of the meeting.

At the ALIA Institute, every hosting-team meeting, faculty retreat, weekly staff meeting, monthly Board conference call, and most other meetings begin with a check-in. At our staff meetings, we usually spend a few minutes sitting in silence to collect ourselves before the check-in begins.

A whole-group check-in works best when the group is small enough that everyone has a chance to speak within a reasonable amount of time. In large groups, you may want to invite people to check in with a partner, or in groups of three or four.

1. As host and convener, prepare yourself and prepare the room. The ideal set-up for a whole-group check-in is a circle of chairs. A check-in can also take place around a table or in a virtual space such as a conference call.

2. Begin by welcoming everyone and giving a brief framing (purpose and agenda) of the meeting.

3. Especially if this is a new process for some, review the guidelines for a check-in. Point out that only one person speaks at a time, and that everyone has a chance to speak if they choose to. This is not a dialogue; there is no back-and-forth, and people don't need to build on or refer to the people who spoke before them.

4. Decide whether you want the check-in to go in sequence around the room, or whether you will invite people to speak whenever they're ready, "popcorn" style. In either case, let everyone know that they can also choose to "pass." They will have another opportunity to speak if they choose to when the others have finished.

5. If it doesn't seem too foreign, introduce a "talking piece" such as a stone, and place it in the middle of the table or the room. Indicate that whenever the first person is ready, they can pick up the stone and begin. When finished they can either put the stone back in the middle or pass it to the person beside them. The stone is a reminder that the holder alone is the speaker. The others are active listeners.

6. Introduce the check-in question. This might be two-part, inviting both a personal update as well as something more focused on the content of the meeting. For example, "How are you, and what are your hopes for today's meeting?" Or, if members of the group are new to each other, "Please introduce yourself and let us know something about what inspired you to join us here today." Another example: "As we approach the next phase of our project, what are you bringing and what are you looking forward to?"

7. Give people an estimate of how long each person should speak. A check-in can be as short as a single word or as long as the group has time for.

8. If the process is new, you can offer to speak first, thus modeling the length and tone of the check-in. Gauge the situation and model a level of honesty and depth of intention that is a step further than the group might otherwise go. Sit in a relaxed upright posture, with feet flat on the floor (joining heaven and earth).

9. As everyone speaks in turn, model attentive listening. If the process breaks down into discussion, simply bring it back. If someone expresses strong emotion, continue to "hold the field" and wait until the person is ready to pass the stone or release his or her turn.

10. At the end, thank the group, shift the tone and pace, and move to the first agenda item.

CIRCLE

The circle format can be used in many contexts, to build community, generate group insight, and heal conflicts. The circle is the shape of wholeness, inclusion, and equality. From the Christina Baldwin and Ann Linnea's PeerSpirit website: "Because circle is universal, it is familiar and easily learned; because circle challenges current status quo, it needs to be hosted with skill."

ART OF HOSTING

No one claims ownership or founder's status of the AoH network, which is self-organizing. However, a number of ALIA friends have played a significant role in giving it life and form, including Toke Moeller and Monica Nissen.

What most distinguishes the Art of Hosting is a spirit of engagement and empowerment that comes from speaking from the heart about what really matters, moving forward with fellowship and courage, and reclaiming the human-scale "village" in our communities and workplaces. The Art of Hosting is influenced by the Chaordic model of change and leadership, as developed by Dee Hock. *Chaordic* refers to the generative, self-organizing zone between chaos (apparent randomness) and order (excessive control). Art of Hosting workshops introduce self-organizing processes such as Circle, World Café, and Open Space Technology.

SOFT-SHOE SHUFFLE (DEEP DEMOCRACY)

Sometimes groups lose their vitality and effectiveness because of unresolved issues and/or suppressed minority voices. Deep Democracy, which was adapted from the work of psychologist Arnold Mindell, is a facilitation approach that helps groups break through these stuck places and move forward with inclusiveness. The Soft-Shoe Shuffle is a Deep Democracy practice that is particularly well suited to large groups. It invites diverse and dissenting opinions into the open, making it relatively safe for them to be expressed. Myrna Lewis first brought the practice of Deep Democracy to the ALIA Institute, and it is now taught and practiced by several Institute alumni, including Sera Thompson and Georgina Veldhorst.

1. The Soft Shoe Shuffle is like having a conversation on your feet. Begin with everyone standing in a circle. Introduce the topic or the question.

2. Anyone can step forward and make a statement expressing an opinion or belief. Everyone then shows where they "stand" relative to this statement by moving either closer to or further from the person who spoke.

3. Invite someone who is standing apart from the rest to express his or her view. Again, the others will move closer or further. When people stand next to the person, they may have their own comments and shadings to add.

4. The conversation continues. Everyone is participating, no matter where they stand. As more views emerge, some people may find that they change their position several times. Thus, while all views can be surfaced, there is also a fluidity that helps to loosen the association between the players and the positions.

7. Designing for Emergence

This uncertainty is not simple uncertainty where we can wait for the game to play out according to well defined and widely accepted rules. No, it is radical uncertainty in which the rules, even the game itself, are transforming in surprising ways.… Not only do we not know what the future holds, but we don't know how to think about what the future might hold!

—Glenda Eoyang

In Nova Scotia, we recently elected a new provincial Party. Not long afterwards I heard one of the government's new Ministers respond to a question about his intended policy by saying, "We should begin by following the adage to 'do no harm.'" When the questioner countered that he expected more from this government—proactive policies and solutions—the Minister referred to some of the community innovations that were already taking place in the province, which had just been showcased. He said, "We need to be careful not to squeeze the life out of what is already there." I thought this response was refreshingly candid and courageous.

Increasingly government and other leaders are realizing that many of their best-intentioned plans, strategies, and efforts haven't produced the desired results. In fact, many have produced the opposite. Especially in large, complex systems, by the time a study has been done and a strategy crafted, the whole situation has changed. Or top-down solutions alienate the people they are intended to benefit. Across all sectors, "helping agencies," over-controlling bosses, and imposed restructuring processes run the

risk of breeding apathy and resentment among those who have been "done to," and helpless frustration among the well-meaning agents of change.

So what does effective strategy look like in a complex, continually changing and emergent world? How do we engage all the players involved without becoming paralyzed by endless process? How do we exercise decisive leadership within the context of the true collaboration and high levels of engagement needed to manage complexity? These are critical questions for our time.

Part of the answer lies in our approach to planning. In highly complex, emergent systems we need to replace linear strategic planning with three-dimensional design thinking.

Christopher Alexander coined the term *pattern language* as a way of describing good design practices within a field of expertise. His own field is architecture, but the term has also been applied in other domains, such as computer science and pedagogy. Alexander inventoried a set of universal patterns, based on examples from many cultures around the world, both ancient and new. As a researcher, his radical premise was that we all have an innate ability to distinguish "what gives life and beauty" as opposed to what has been created from a more arbitrary or relative intention—for example, with a primary focus on efficiency, fashion, or the architect's self-expression.

Alexander maintains that "each pattern describes a problem which occurs over and over again in our environment, and then describes the core of the solution to that problem, in such a way that you can use this solution a million times over, without ever doing it the same way twice."

While Alexander remains a controversial figure, his ideas point towards the kind of fluency that is essential when working in complex, challenging environments. How do we design organizations, projects, and change processes that support life—that support and nourish people and their work over time? What are the patterns and solutions that can be used "a million

times over, without ever doing it the same way twice?" As the architects of social space, we ignore these patterns at our peril. Our efforts will fail to ignite passion, imagination, and commitment. It will be as if we are pushing our agenda uphill, rather than connecting with the social life force that is already present.

Emergent design is defined by creative paradox— by a tension between freedom and constraint, chaos and structure, heaven and earth. This is an age-old tension, and potential harmony, that is expressed in Taoist literature as well as the recent fields of social innovation and strategy. We could say that these "new" approaches to social design create "minimum structure" in order to avoid too much rigidity and harness the innate intelligence, creativity, and capacity for self-organizing and self-actualizing in people and groups.

Too much planning, structure, and intervention will stifle adaptive capacity. Too little structure will leave a system vulnerable to the entropic forces of habit, conflicting self-interests, and lack of vision and direction. A good strategic design is elegant in its simplicity, with well-defined parameters and clarity of purpose and success criteria.

Such a design also provides a way to discern the needs of the future by reaching deeply into the evolving patterns of the present, rather than simply projecting the assumptions and lessons of the past. The learning and data gathered in the past may be useful but will also have diminishing relevance in a rapidly changing environment. Also, these learnings will no longer hold the fresh energy needed to engage current players in robust forward movement.

The relatively recent fields of Complexity Science, Theory U, and Chaordic Design all provide frameworks of "just enough" structure. When you design a process using one of these frameworks, you may not know where

you will end up, but you do know why you are embarking on this project, what you hope to achieve, and the general direction you are headed. Then you set out on a journey and build the road as you walk it, staying flexible and responsive to the changing terrain along the way.

Proceeding on such a journey begins by gaining an understanding of the territory—the dynamics and patterns within a system. This understanding will be informed by available data and analysis, but in complex systems it is impossible to map all the interconnected, changing variables at play. To complement this analytical understanding, we also need to become immersed in the system with other parts our neurological system (other ways of perceiving and knowing) switched on, so that an intuitive way of knowing the whole is also activated.

The inner leadership capacity of "knowing the whole" supports the outer practices of emergent strategy and action. The synthesis of these two, inner and outer, is the sweet spot of the ALIA Institute's approach to transformational leadership and change.

Following are two stories of emergent strategy and action. What are your own stories? What are you learning?

BIRTH OF A CANADIAN CLIMATE CHANGE INITIATIVE

At the 2007 Summer Program, a module on "Solving Tough Problems" used climate change as a case. This module, which was facilitated by Adam Kahane and LeAnne Grillo, led participants through a Change Lab process, based in part on Theory U. At the beginning of the week, the module left the program site to embark on "learning journeys." They traveled in small groups to pre-arranged destinations in Halifax to conduct "dialogue interviews" with diverse stakeholders about their engagement in the issue. All of these voices were then brought back into the module container, as a microcosm of the larger system. The group immersed itself in these voices as a way of going deeper into the complexities of the issue. Out of this "presencing" stage, ideas for prototyping high-leverage interventions arose. The Change Lab process is designed to generate new thinking that integrates multiple perspectives and thus has a better chance for engaging diverse stakeholders and creating sustainable innovation.

While the particular case was meant to demonstrate a process that can then be applied to one's own leadership challenges, whenever this module has been offered, the case itself generates new initiatives and partnerships, usually in the Halifax region. This year, however, one "prototype" ended up traveling across Canada, creating new cross-sector partnerships and influencing the national political discourse on climate change.

It happened that two of the module participants were John Roy, a retired businessman, and Scott Brison, a federal politician, who both live in rural Nova Scotia. The possibility they saw was to bring together senior leaders from the energy, environment, and business sectors for a dialogue that would also be a call to action. They saw that such a group would be well positioned as a credible voice that could speak not only to their

own sectors, but to the Canadian people at large. The public tended to be distrustful of politicians' messaging, and confused by the conflicting viewpoints of various interest groups. The new group, which came to be called 3E—Energy, Environment, Economy—would present information and proposed solutions that would be focused on the best interests of all Canadians and of future generations.

The project accelerated quickly, with help from LeAnne Grillo, Adam Kahane, and others, and the results of the dialogue did indeed influence the national discourse. There have been bumps along the road, and the work continues. A call to action was signed by sixty-seven senior leaders from across sectors, including four former Prime Ministers. In addition, a new initiative was created to sustain the ongoing work, called Power Up Canada.

EMERGENT DESIGN AND ACTION IN COLUMBUS, OHIO

Phil Cass first attended the Shambhala Summer Program in 2001, as part of a quest to discover more about his own leadership as the CEO of a long-standing and much-respected medical association and foundation in Columbus, Ohio, USA. Phil was interested in questions of community involvement, and how he could let go of degrees of control without letting go of accountability to his board and to the community at large. He found his way to the Institute because he was attracted to the writings of Meg Wheatley, who would be teaching a module there.

That first year Phil was delighted to be able to study with Meg. He also picked up some practices—meditation, which he continued to pursue back home, and World Café, which he began experimenting with in board meetings. In the following years Phil returned to the Institute each June, as a kind of New World explorer in search of stories and riches to take back home. His organization also sponsored teams to make those exploratory journeys with him.

Gradually the organizational culture was being transformed, as new ways of thinking and organizing seeped into the system. A 2007 doctoral project later studied these changes and reported "higher-level social learning and unlearning, and development, resulting in increased service to the community…. The energy and momentum are contagious as evidenced by community response to open assemblies for optimal health solutions, attendance at learning workshops, and the expressed enthusiasm from board members." The report concluded that the combination of Phil's authentic leadership, his clarity of purpose, and his ability to design processes that engaged a broad spectrum of employees while staying responsive to emerging needs and trends all contributed to these dramatically positive trends.

(from "Exploring Intentional Learning Practices in Mature Organizations" by Anne Saber Lallcom, 2007)

The effects of Phil's trips to the Institute were also being widely felt outside the organization. In 2004, Phil invited Toke Moeller to come to Columbus and help him initiate a process that would introduce a "culture of conversations that matter" across the city. At the Institute he had had a taste of the Art of Hosting but wanted someone more experienced to walk (and build) the road with him. Phil began by inviting three others in Columbus to hold the centre of this project with him, as the first hosting team. They in turn invited leaders they knew from across the city to an informal gathering, where Phil and others shared their inspiration.

In March 2005, a group of thirty-six invited community leaders who spanned sectors and generations spent three full days learning the art and practice of "hosting strategic conversations." When the group reconvened in October, each person told a story of how this new seed had begun to germinate in their work and life, in some cases dramatically. Many were now inspired to go forward with further training, and to host a community gathering. One member, Matt Habash, who at the time was both President of the Columbus City Council and Executive Director of the Mid-Ohio Food Bank, applied his new skills in convening a community dialogue around hunger.

From there the project has grown, step by step, through expanding circles of engagement and spin-off projects. Over 350 people have attended Art of Hosting training sessions, the most recent sessions being led by early graduates. In every case, those who participate are learning not only the skills of convening but also how to design emergent change processes in their home context. In addition, over forty leaders from across Columbus have attended ALIA programs, bringing other skills and practices into the mix as they also develop their own authentic leadership.

Phil reports that in recent encounters around the city, conversations often end with, "Oh, by the way, we recently engaged our community/stakeholders to…" The sentence is completed with stories ranging from "create a new public policy on pathways and bikeways" to "identify what career-oriented skills are needed in our community" to "create a neighborhood health co-op" to "create a master plan for our city's growth (at a fraction of the cost and time needed for the previous plan)" to "establish the key competencies in a university-level nonprofit leadership curriculum." With a mix of wonder and exasperation, Phil concludes, "We have no idea how many 'oh by the way's' are out there. How on earth do we begin to measure or even describe this phenomenon?"

What were the conditions that allowed for this scaling-up from a small seed? Phil reflects, "Some of it is obvious—through my position I was able to convene key people and provide funding to get things started. The ALIA Institute has been an ongoing resource, feeding the process and bringing others along. And then there's something less obvious. There were moments that were pivotal, almost magical. One was at the end of the 2002 Summer Program, when I told Toke I had a hunch there was work we could do together in Columbus, but I didn't yet know what it was. Toke replied, 'Do we have a contract? and extended his hand.' We shook, and I knew it wasn't just about a contract in the usual sense. It was a commitment to a possibility that was sensed by both of us but not yet clear. Moments like that occur when there is a sinking into what I call a nature flow. It's as if the universe starts to conspire to make things happen."

Practices

CHAORDIC DESIGN

The steps of Chaordic (chaos + order) design were developed in the early years of the Chaordic Alliance, founded by Dee Hock, Tom Hurley, and others. Since then, practitioners have been adapting and expanding on these steps. The Art of Hosting, for example, uses Chaordic Design as its foundation. The Chaordic steps ensure that the structure and organization of an initiative serve the need and purpose, rather than being the driver. The following summary of how a hosting team (or core group) moves forward using the "Chaordic Stepping Stones" is excerpted from a document developed by Chris Corrigan with input from Art of Hosting practitioners Toke Moeller, Monica Nissen, Tim Merry, Tuesday Ryan-Hart, and Phil Cass.

Chaordic Stepping Stones

The chaordic path for me is a lovely map of how to walk the balance between chaos and order, and when we engage in design to ensure that we are giving attention to forms that work with both chaos and order, life and form, yin and yang, creativity and structure.

The stepping stones give us just enough form to hold the life that is present in a group of people so that it can be directed to a particular purpose. Too much form and apathy appears. Too much chaos and people check out. The balance point is the sweet spot.

Each of these stepping stones is activated by asking key questions. As we design our work together, we select from these questions (or design others) to help us explore each stone as we lay it in place.

Need. The need is the compelling reason for doing anything. Sensing the need is the first step to designing a meeting, organizational structure or change initiative that is relevant.

Questions: *What time is it in the world now? What are the challenges and opportunities we are facing? What is the need that this project can uniquely meet?*

Purpose. From the need flows the purpose. Purpose statements are clear and compelling and they guide us in doing our best possible work.

Questions: *If this work should live up to its fullest potential, what do you dream (or vision) is possible? What is the purpose we can adopt that will best meet the need? What could this work do/create/inspire? What is the simplest and most powerful question we could keep at the core of our work?*

Principles. Principles of cooperation help us to know how we will work together. It is very important that these principles be simple, co-owned, and well understood. These are not principles that are platitudes or that lie on a page somewhere. They are crisp statements of how we agree to operate together so that over the long term we can sustain the relationships that make this work possible.

Questions: *What is important to remember about how we want to work together in our initiative?*

People. Now we can begin to identify the people who are involved in our work.

Questions: *Who is not in the room and how do we bring them in? How do we leverage relationships to propagate the ideas generated by our work together? Who will be interested in the results of our work?*

Concept. As we move to a more concrete idea of what our structures are, we begin to explore the concepts that will be useful. This is a high-level look at the shape of our endeavour. For example, if our need was to design a way to cross a body of water, we could choose a bridge, a causeway or a ferry.

Questions: *What are the shapes that we might choose for our work? What is the deeper pattern of our work and what organizational forms are in alignment with that?*

Limiting beliefs. So much of what we do when we organize ourselves is based on unquestioned models of behaviour. These patterns can be helpful but they can also limit us in fulfilling our true potential. We cannot create innovation in the world using old models and approaches.

Questions: *What makes us tremble, and what do we fear about new ways of working together? What is our own learning edge in working together? What does each of us need from our core team to feel supported in the places that make us anxious?*

Structure. Once the concept has been chosen, it is time to create the structure that will channel our resources. It is in these conversations that we make decisions about the resources of the group: time, money, energy, commitment, and attention.

Questions: *What is the lightest structure that will serve our purpose and need? What role might the core team play when the project is over?*

Practice. The invitation here is to practice working with one another in alignment with the designs we have created.

Questions: *How do we sustain and nourish our relationships and collective aspirations? What commitments are we willing to make to contribute to the success of our endeavour?*

Harvest. There is no point in doing work in the world unless we plan to harvest the fruits of our labours. Harvesting includes making meaning of our work, and telling the story and feeding forward our results so that they have the desired impacts in the world. It is important to note that harvesting is an activity that needs to be planned up front, in the spirit of "we are not planning a meeting, we are planning a harvest."

Questions: *What are the forms of harvest that best serve the need and purpose of our work? What are the artefacts that will be the most powerful representations of what we have created? What feedback loops do we need to design to ensure that learning and change accelerate themselves? How will we stay open to emergent learning?*

U PROCESS

Theory U, as developed by C. Otto Scharmer and his associates, describes a framework and set of practices for generating "profound innovation." The process is a personal and collective journey that moves through different levels of attention, from "holding the space" to "observing" to "sensing" and "presencing." From there, an individual or collective is able to "bring forth the world anew" through "crystallizing," "enacting," and "embodying." The Presencing website is a rich source of articles, books, and presentations.

CHANGE LAB

The Change Lab also draws on the principles and practices of Theory U to design and implement multi-stakeholder solutions to complex, systemic challenges.

HUMAN SYSTEMS DYNAMICS

Human Systems Dynamics applies complexity science to everyday challenges and builds adaptive capacity in organizations and other systems.

SIMPLE RULES

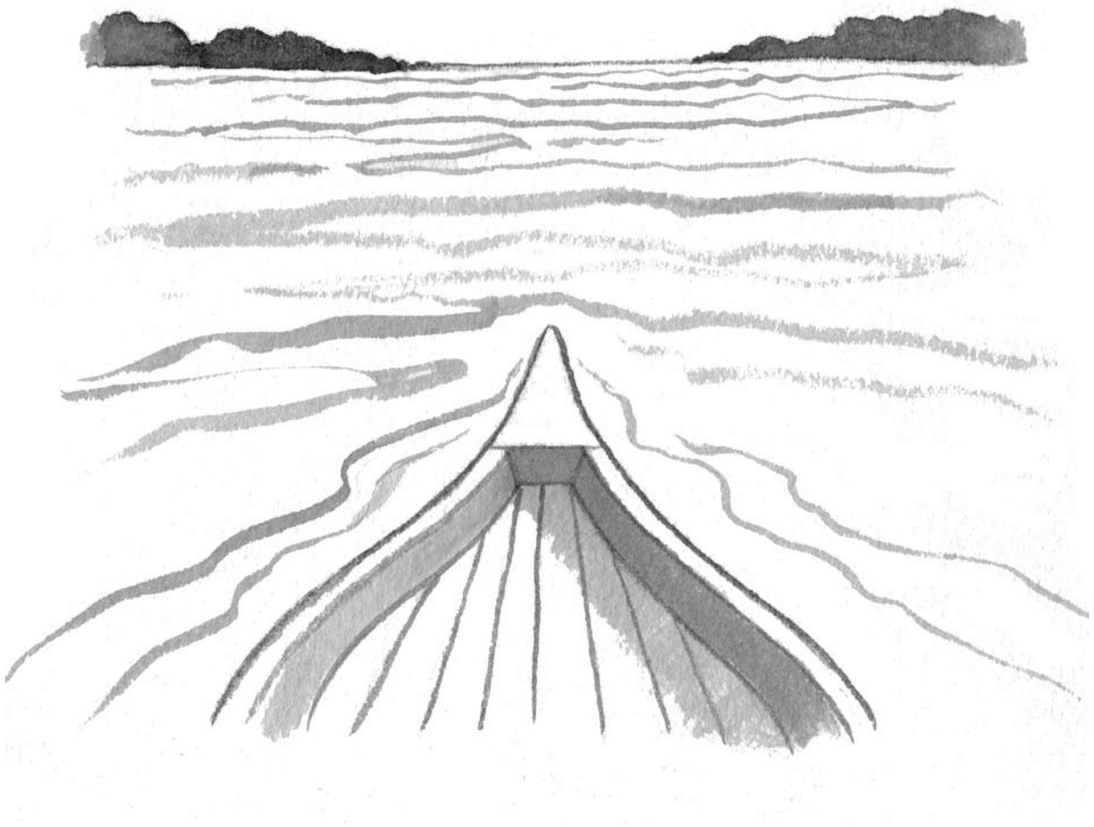
Discover and articulate the minimum rules (or min specs) that, when followed, will shape self-organizing in the direction you wish your team or organization to move. For example, these are the simple rules for the Human Systems Dynamics Institute:

- Teach and learn in every interaction
- Reinforce strengths of self and other
- Search for the true and the useful
- Give and get value for value
- Attend to the part, the whole, and the greater whole
- Engage in joyful practice

Endless Journey

Having established the ground and embarked on our journey, we meet opportunities and obstacles as they arise. We read the patterns, weave connections, and act decisively when the timing is right.

Our journey carries us along, as if we are riding an energetic horse. With our fellow travelers, we celebrate this never-ending journey, engaging with perseverance and joy.



8. Strategic Action

The myriad details can never be fully counted, but we aspire to know them, and then to go beyond the countable things to know the larger and deeper patterns in the phenomenal world. Then we can "go with" these patterns to apply powerful and effective action, just as seafarers came to know the patterns of winds and ocean currents to chart their way across the vast featureless expanse of the ocean.

— James Gimian and Barry Boyce

Usually the leadership story is all about action–what we did and what we achieved. This is how leadership is measured. In this Little Book, much of the focus has been on how we create the best possible conditions for action—how we frame the situation and create a conducive place and container; how we create alignment within ourselves and within our team; and how we design for complexity and emergence. These are the invisible practices that bring accuracy, depth, and synchronicity to our actions. In fact, our leadership may also be relatively invisible, because we are letting the conditions do most of the work.

In practice, preparation and action aren't two distinct steps. Because our attention isn't locked in, we are constantly reflecting, learning, and adjusting as we go. When we come up against a roadblock, we recognize that we have a choice to either solidify and push harder or to let go, open out, and find a bigger frame. We know our tools and methodologies well and we choose them wisely, but we never mistake the tools for the deeper patterns

and principles behind them.

A recent conversation on the Art of Hosting list serve included the following exchange.

> Monica Nissen: The core for me is beyond the methodologies. We all have a sense of different methodologies being appropriate at different times. It is as if we are musicians with different instruments, skills, and preferences. When we first began talking about the Art of Hosting we wanted to go beyond the "instrument" to the musician.
>
> Tim Merry: Yes, we bring diverse gifts that meet different needs at different times. What is the practice that will serve the need and desires in the moment? We find ourselves working with U process, Change Lab, Art of Hosting, Deep Democracy, Interactive Theatre, Coaching, Future Search, and more. I feel they all come from the same deep well and the water is good. There is deep architecture to this work that has no name but is present in all of these patterns that are hosting the new into the now.

The *Rules of Victory* says, "The myriad details can never be counted, but we aspire to know them." We do our homework. We complete our research, analyze the data, and prepare the reports. We learn the theory and methodologies, and master the instruments and tools. And then, for our actions to be truly effective, we must also navigate the "larger, deeper patterns." We see favorable conditions coming together and momentum building. We recognize that a small action well timed has the potential to change the game. We notice sparks of generative energy and we add our fuel. We watch for openings in the person or system we wish to influence, and at the right moment we move in with our question, our proposal, or our challenge. We

sense that a cycle will soon have run its course, so we begin bringing people together to sense and prototype the new.

I recently asked Cheryl Rose, Director of Social Innovation Generation at the University of Waterloo, what her colleagues' research was revealing about critical success factors. Why did some innovative projects succeed but not others? What did start-ups with sustaining power have in common? She reported that the key factor seemed to be the presence of someone, not always in a formal leadership position but usually so, who was a "master weaver." This person was able to monitor complex conditions, weaving connections and opportunities as they arose in a deeply intuitive way. This leadership capacity was not always immediately visible to outsiders. While it was important to recognize and amplify this talent, it was also important to give this person the room to do what they did. They needed to be allowed to follow their instincts. The important question, she concluded, was whether this talent could be intentionally cultivated. So far, master weavers were relatively rare, and existing leadership programs didn't necessarily produce them. I left this conversation with a new vocabulary for an already existing hunch—that the real purpose of our new ALIA Pathways program was to deepen the skills and lifelong practices needed by "master weavers" of emergent action.

If the circle is the shape of wholeness, integration, and emergence, the triangle is the shape of intention, strategy, and action. The triangle is pointed, efficient. When it is time to act, everything comes to a point. At the ALIA Institute we have several metaphors for this, and one is the sword cut. When Aikido master Bob Wing first brought wooden practice swords, or *bokken,* to the Summer Program, it was amusing to see people in his module carrying them around between sessions. They had their conference bag, their water canteen, and their sword. But it soon became apparent that there was something powerful going on in that module. People were

practicing how to extend authentic presence into action, how to wield the power of the moment without ego or aggression, and how to make a clean, decisive cut. I heard that the women, particularly, found it provocative to embody the stance of the warrior, the power of the sword.

I now have my own bokken, and I sometimes start the day with this practice. It begins with embodied relaxation and alignment, joining heaven and earth. Then I gather my intention, lift the sword high, and bring it down swiftly in front while stepping forward. I cut with one-pointedness. I cut through any hesitations, stuckness, fear, and small-mindedness. Then I let go and the space opens up. This is one of the most efficient ways I know of dispelling morning cobwebs or preparing for a difficult meeting or decision point.

Bob Wing is probably the jolliest samurai-type person I know. He is warm and engaging, with a twinkle in his eye and mirthful sense of humor. And yet he is solid, like a mountain. I have tried catching him off-guard, but it is as if he has roots that extend down into the ground. And whenever he gives us a glimpse of his fiercest cut, his real sword, there is never a trace of aggression or personal agenda involved.

Another action metaphor is the brush stroke. Barbara Bash has trained in brush calligraphy for thirty years, beginning with calligraphy masters Ed Young and Chögyam Trungpa. She embodies each step of the process in a way that is always an inspiration to me. Again, the stroke is an exercise in alignment, in joining heaven and earth and gathering everything into a moment of decisive action. When I have practiced this, the mark that is left on the paper is sometimes shocking, as if it appeared from the space itself. And any quiver of self-doubt, any second thoughts, are immediately visible on the paper in a way that is strangely exposing. Some years we have experimented with large-group brush practice. Thirty people doing this exercise together with 150 others watching in silence is an unforgettable experience.

Practice

RAISING THE ENERGY OF CONFIDENCE AND CONNECTION

Shambhala was introduced to the West as a body of secular teachings that include pre-Buddhist practices of central Asia. Some of these are an extension of "joining heaven and earth." They allow us to connect with the energies and dynamics of the world more directly, so that our actions are timely and synchronized. One of these practices, called "raising windhorse," is introduced in some of the Institute's more advanced modules and programs. Arawana Hayashi also introduces it as an "open will" meditation in the context of Presencing programs. Essentially, windhorse is the energy that naturally arises when we align ourselves with heaven and earth, let go of fixation, and expand awareness. We can do this within the context of meditation or in the midst of everyday life.

9. Thinking Bigger

The stuckness you experience as obstacle and conflict is often the result of not seeing the larger environment around whatever is happening. Missing critical points, and sometimes obvious solutions, can be the result of having too narrow a focus. The antidote to that is to allow your mind to become bigger. A bigger mind leads to a bigger view, which gives rise to unusual solutions.

— James Gimian and Barry Boyce

There's a crack in everything. That's how the light gets in.

—Leonard Cohen

Just as place can be a powerful ally for leaders, so can space—the space between, the space of connection, the space of uncertainty, the space of stillness. When we ignore space we become a little stupid. We bump into things. We only see what's right in front of our noses or down the tunnel we've projected into the future. We don't pick up on relationship cues, and we don't hear the peripheral voices of our own intuition. We are blind to the full consequences of our actions, and we miss opportunities for transformational learning and action.

Connecting with a bigger space accelerates our leadership journey. To do so, we have to be willing to let go, even just a little, of what we *think* about who we are and what is possible. Then a door begins to open, just a crack. We push open the door and step outside. The air is fresh, crisp, exhilarating. Our curiosity draws us forward. The path ahead is unknown yet beckons us forth.

Space shows up in our experience in many ways. Sometimes it is literal—the space we inhabit in our offices and meetings. Sometimes it is a state of mind, or the space at the edge of our thoughts. "Too much" space and we feel bored, impatient, disoriented. We feel uncomfortable in the space of not-knowing or not-yet-clear and we want to fill it, or solve it, or make it solid. We look for a familiar reference point, something tangible to hang onto, or we seek an exit. We think that space is a problem rather than an ally, and we try to escape.

Maybe we are in the middle of a project. The initial excitement and inspiration have worn off and it's not clear how all the pieces are going to come together. We start doubting whether we're on the right track or in the right place at all. At ALIA programs we often find ourselves, individually and sometimes collectively, entering this zone mid-program. Sometimes it is called the "groan zone." A big space has been opened, and then it's as if the wind just disappears out of our sails. Everything is flat, irritating. We might create an exit by solidifying a minor irritation into an elaborate story or sense of righteousness, or by literally retreating to our private room. At these times it's important for the hosts (and everyone) to continue holding the container, and to be wary of the tendency to jump to conclusions. At the Summer Program, the second-to-last day seems to be when the groan zone intensifies and then breaks. A gust of fresh wind and energy comes along and the mood expands. Insights begin to coalesce, take form, and move towards departure and action.

One evening during the first Summer Program, Fred Kofman led an activity in which he asked people to share a story with a neighbour about a time of breakthrough—a time when they learned something significant about themselves, a time that was life-shaping. Once these stories had been shared, Fred asked everyone to think of these stories as having two parts: a

leading edge and a trailing edge. The leading edge was the experience preceding the breakthrough. What was that like? People responded with words such as *bored, panic, confused, frightening, despair*. Fred then said, "Now let me tell you about a discussion I had with the people who organized this conference. I told them I wanted to help them with marketing by sending people the following letter: 'We have designed this experience so you will be able to achieve your maximum learning capacity. This is going to be an experience that you'll remember for the rest of your life. Therefore, we have created an environment where you will feel panic, despair, boredom, chaos, fear.… RSVP!'" The room exploded in laughter and recognition.

Unless someone draws our attention to the discomfort that comes before breakthrough, as Fred had done, our memories tend to focus only on the prize, the take-away. As we become more familiar and more at ease with the whole landscape, the next time we reach this between-space we will be less likely to back away, to avoid the sharp points and the doldrums. We will be less likely to lose a precious opportunity for learning and growth.

We will also recognize that transformation is always happening, already. "Transformational leadership" means that we are willing to be transformed along with our world. We won't be so quick to protect ourselves from the person we meet, the challenge we encounter. We will lean in to the seasons as they transform from one to the other, and we will recognize when it is time to let go of the summer of our lives, our project, or our work, and when it is time to harvest, sow new seeds, or go fallow and reflect.

Making friends with space means making friends with a more expansive sense of oneself, or you could say, something bigger than oneself that also isn't "out there." This can be scary and disorienting while also like coming home.

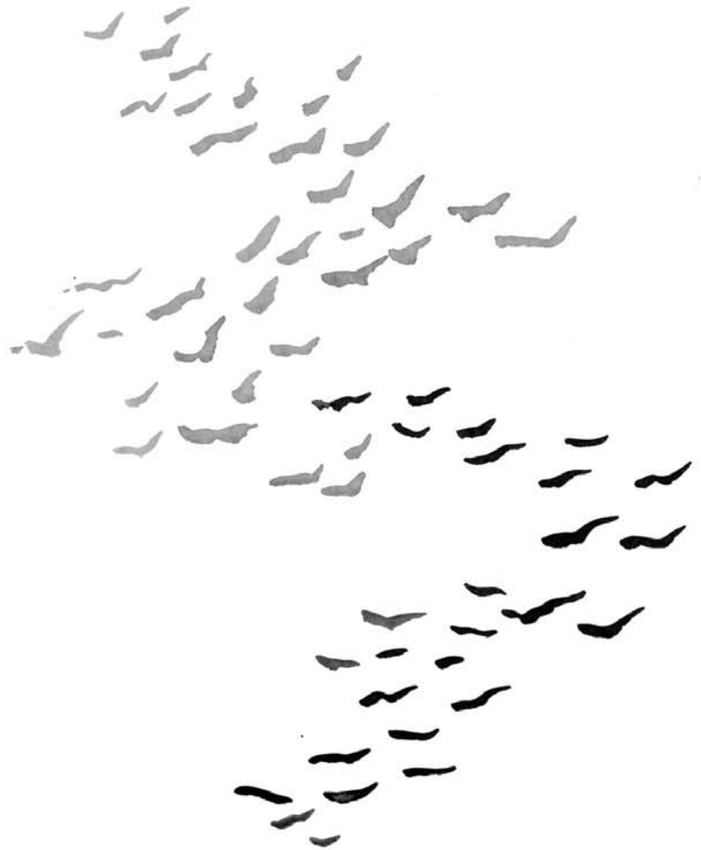
If you have ever sat in a circle with people—possibly strangers—who were speaking and listening with genuine heart, you may have noticed how

the quality of the space changes as people become more present and authentic with themselves and each other. This space is an ally. It is healing, intelligent, alive. It doesn't belong to anyone, yet everyone is included in it. In a world that is fragmented, stressed, and fearful, this space is an oasis. Once people have experienced it, they will want to return. Enduring commitments and bold actions are born from this space.

INSIDE
By David Abram

In the seventeenth century, European persons suddenly found themselves adrift in a limitless space, a pure *outside.* Only in the wake of this dramatic disorientation, and the attendant loss of a *collective* interior, did there arise the modern conception of mind as a wholly *private* interior, and hence of each person as an autonomous, isolated individual….

The feelings that move us—the frights and yearnings that color our days, the flights of fancy that sometimes seize us, the creativity that surges through us—all are born of the encounter and interchange between our life and the wider Life that surrounds us. They are no more ours than they are Earth's. They blow through us, and often change us, but they are not our private possession, nor an exclusive property of our species. The mind is not ours alone, nor the imagination. With the other animals, as with the crinkled lichens and the river-carved rocks, we're all implicated within this intimate and curiously infinite world, poised between the tactile landscape underfoot and the visible landscape overhead, between the floor and the ceiling, each of us crouching or tumbling or swooping within the same vast interior. Inside the world.



Practices

MINDFULNESS MEDITATION, PART 2

Whatever your personal practice, stick with it. For example, the mindfulness practice described earlier naturally evolves into mindfulness-awareness practice over time. For those who engage in this practice regularly, it becomes a powerful support for everyday life and, more specifically, for the practice of authentic leadership in action.

There are countless types of meditation that serve different purposes. Generally, these could be categorized into two broad types: (1) generating certain states of mind and (2) becoming more present to whatever is taking place, without manipulation. At the ALIA Institute we adopt the second approach. Within that approach, there are two further categories: (1) cultivating precise and grounded attention (mindfulness) and (2) cultivating more expansive field-centred attention (awareness). The way meditation was first introduced to Westerners by Chögyam Trungpa, and the way it is introduced at the Institute, combines mindfulness and awareness.

When mindfulness and awareness come together, we connect with authentic presence and our actions are accurate.

It is helpful to have a context for any ongoing practice, as it is easy to lose freshness and balance within the practice over time. Any genuine practice is more of an art than a technique, and it unfolds in a uniquely personal way. Whatever your personal leadership practice, if you are fortunate you have a guide or mentor and a community.

FIGURE-GROUND SHIFT

Leadership development educator and movement artist Wendy Morris helps people tune into the "spaces between" by inviting a group of people to mill around in the space. One member of the group then cuts through the middle, crossing from one side to the other, while trying not to bump into anyone—usually with mixed success. The next instruction is to try the same exercise while focusing on the spaces between people rather than the people themselves. The success rate dramatically increases.

Throughout your day, as you move through a room, through your office, or through a subway crown, practice this figure-ground shift.

MAKING TIME FOR REFLECTION

Create a clearing in your day for reflection. Some people like to reflect while walking or journaling. Also schedule regular times for team reflection at work.

10. Warriorship

You begin to understand that warriorship is a path or a thread that runs through your entire life. It is not just a technique that you apply when an obstacle arises or when you are unhappy or depressed. Warriorship is a continual journey: To be a warrior is to learn to be genuine in every moment of your life.

—Chögyam Trungpa

Recently, Jim Drescher, Crane Stookey, and Jim Marsden dropped by the ALIA office in Halifax, eager to share their ideas. These three had connected at the Summer Program and were now excited to collaborate on an outdoor leadership course. Jim Marsden had made the trip back to Halifax from Colorado so that they could explore each other's work in more depth, in the context of a contemplative day in Jim Drescher's forest and a sailing adventure on Crane's boat. The three were bright with possibility and the enjoyment of being with each other. They mused about the powerful learning experience they would design.

Then Crane said, "Do you really think there would be a market for this? Who would want to actually get into it?" There was a moment of silence and then Jim Marsden continued, "If you knew what you were getting into, you might never begin. Who believes they have the courage and the perseverance?" At that point I realized they were reflecting on something more than a course, something that reminded them of their own journey. They were seeing that their course had the potential to awaken the hero's journey, or you could say the warrior's journey. They knew that once that journey

was awakened it could become one's life.

Warriorship is a central theme in Shambhala, but it is not one that we usually say much about at the ALIA Institute. Some of the people who come to the Institute have lived through the violence of war, and many more live in countries that are perpetuating cycles of warfare elsewhere. A word like *warriorship* can understandably cause people to recoil, especially when there isn't the time to fully explain its meaning in a new context.

The fact is that Shambhala is not about war at all, but about "victory over war." Shambhala warriorship is a journey of discovering that we are authentic, dignified human beings capable of transforming aggression in order to create more enlightened societies and a more sustainable world. To do so requires a warrior's spirit, which is gentle and intelligent, while also firm and brave.

Although we would probably all say that we want peace, if we make this the focus of our identity we risk further fragmenting our world. Perhaps we see ourselves to be on the side of peace, which is right and good, while those others "over there" are causing conflict and aggression. In our efforts to fix the problem, we could end up imposing our "peace" in a way that further solidifies everyone's position and escalates the conflict. The notion of warriorship invites and challenges us to engage our world, in all its messiness, from the inside and from a perspective of wholeness. We are in this together. We created this mess. Can we lay down our arms and find a bigger frame, a way that everyone wins?

One of Wendy Palmer's embodied leadership exercises involves stepping in to an oncoming threat, joining with the energy and redirecting it out of harm's way—or, even better, towards the direction that one wants to go. This is a classic Aikido move. It sounds good in theory, but it is only when we embody and practice such a move that we are able to access this option

in the midst of action. Otherwise our default response will be to pull back, freeze and defend, or lash out.

Warriorship happens in small moments. In her writings, Pema Chödrön describes the journey as a constant coming-back to authenticity. When we find ourselves recoiling, judging, or pushing away, we catch ourselves and reverse the tendency. We welcome that which we tend to reject. Over time, this practice softens our false armor, so that we become more flexible and available, and better able to see and feel through others' experience. We stay with our shakiness and our fear, as well as our triumphs. Our vulnerability becomes our true armour. We maintain our balance through the doldrums, shocks, exhilarations, and day-to-day routines along the way. It is as if we are riding a horse, which is the journey itself.

While as program organizers we have been reticent to introduce the language of warriorship, Meg Wheatley has been less hesitant. Since the first Summer Program, she has talked about the courage leaders need to introduce change, or even to function, in today's climate of pervasive fear. She also predicted that this trend would only get worse, and that we were heading for very dark times. Some of us tactfully tried to tone down these messages, wanting to keep the focus more upbeat. Nevertheless, the first year (June 2001) a few people fled Meg's module, complaining that she was "in a dark place." As events have unfolded since then, many of Meg's predictions have been realized. In 2008, we were searching for a title of her next module (with Jerry Granelli and Jim Gimian), and I was suggesting alternatives that seemed to me to be "reasonable." We went back and forth, and finally she said, "For heaven's sakes, why don't we just call it what it is: Leader as Shambhala Warrior." And suddenly I realized that anything less would be cowardly.

Another theme that Meg has explored at the Institute is that of "giving up hope." Again, this runs counter to what many people want to hear.

Don't we need hope to keep going and to generate positive energy? But Meg asserted that hope can leave us vulnerable to defeat. When we don't achieve our goals, when we experience set-backs or have a glimpse of the sheer enormity of the challenges we face, we can become disheartened and fall into paralysis. There is no guarantee that our optimism is warranted. It may be too late to reverse destructive trends. Better to find a different fuel for our efforts, to engage without expectation, and to travel on our journey without fear *or* hope.

While this rang true, it was a tough message, and I wondered how practical it was in the "trenches." This question became heightened in 2008, when many people at the program were tuned into an unfolding crisis in Zimbabwe. Through past exchanges with Kufunda Village, a Berkana learning centre near Harare, a number of ALIA attendees had personal relationships with people who now feared for their lives. In the midst of the crisis, Marianne Knuth, founder of Kufunda, shared her reflections in a letter sent by email to the program community. From the immediacy of her words, I concluded that there were at least two kinds of hope. One is goal-focused and co-dependent with its shadow side, fear. The other is more like an uplifted spirit that can actually dispel fear. It was this second kind of hope that the people of Kufunda kindled together, as they found a way to continue on in spite of the darkness that descended around them.

When have you experienced the positive side of hope and fear? When do you get caught by them?

RIDING THE HORSE
By Chögyam Trungpa

Even though the horse underneath you may move, you can still maintain your seat. As long as you have good posture in the saddle, you can overcome any startling or unexpected moves. And whenever you slip because you have a bad seat, you simply regain your posture; you don't fall off the horse. In the process of losing your awareness, you regain it *because* of the process of losing it. Slipping, in itself, corrects itself. It happens automatically. You begin to feel highly skilled, highly trained.…

At this point you begin to experience the fundamental notion of fearlessness. You are willing to be awake in whatever situation may present itself to you, and you feel you can take command of your life altogether, because you are not on the side of either success or failure. Success and failure are your journey. Of course, you may still experience fear within the context of fearlessness. There may be times on your journey when you are so petrified that you vibrate in the saddle, from your teeth to your hands to your legs. You are hardly sitting on the horse—you are practically levitating with fear. But even that is regarded as an expression of fearlessness, if you have a fundamental connection with the earth of your basic goodness.

Practice

AWAKENED HEART

Pema Chödrön describes this practice, called tonglen, this way: "Tonglen practice has to do with cultivating fearlessness. When you do this practice for some time, you experience your heart as more open. You begin to realize that fear has to do with wanting to protect your heart."

This practice is described in detail in the book Start Where You Are: A Guide to Compassionate Living. *It can either be practiced for a period of time within the context of sitting meditation, or it can be applied in the midst of everyday life, as an immediate response to a situation that feels stuck, charged, painful, or confusing.*

1. For just a moment, flash an open state of mind.

2. With the next inbreath, imagine that you are breathing in a texture that is dark, heavy, hot. With the outbreath, breathe out a texture that is white, light, and cool. Repeat this until it is a synchronized rhythm.

3. Breathe in whatever pain and suffering is in you, in another person, and/or in the environment. Pema comments, "The main point is that the suffering is real, totally untheoretical. It should be heartfelt, tangible, honest, and vivid." You don't have to sort out whether the suffering, or its cause, belongs to you or the other person. Just breathe it in, along with the texture of dark, heavy, hot. Breathe out a sense of kindness, clarity, and spaciousness. Continue to alternate in this way.

4. Extend the wish to relieve this same suffering in others. For example, if you are breathing in anger, extend the range of your inbreath and outbreath to include others who are similarly caught by anger. Keep expanding your range to include as many people as possible.

11. Celebration

Each year, the Summer Program ends with a closing ceremony followed by a celebratory banquet. On Friday afternoon everyone makes their way back to the meeting hall for the last time. The room is subdued. It has been a full week.

The hall is arranged with diagonal rows of blue meditation cushions, a wide aisle down the middle, and chairs around the edges. Sometimes we begin with "offerings" from each of the modules. These are barely rehearsed group presentations that range from demonstration to explanation to song. One year Art Kleiner's group presented the results of their scenario planning module, which had used climate change as a case. In the four corners of the room, one person at a time stood up and spoke from a future generation, as the voice of someone living in one of the "plausible futures" impacted by climate change. It was a haunting experience.

After the presentations, Barbara Bash unrolls a long sheet of white paper down the central aisle. Using a bucket of black ink and a horsehair brush the size of a mop, she performs a closing brushstroke. She collects herself, her presence, and the presence of the room into the task, into the brush and the ink. She lifts the dripping brush, and then suddenly dives onto the paper, moving and turning as the stroke reveals itself down the length of the paper. When it is done, she returns the brush, bows to the paper, and returns to her seat. All is still again. At the front of the room, the gong is struck three times. As the sound dissolves, so does our container for the week.

We disperse, then return for a final celebration. The university cafeteria

has been transformed into a sparkling banquet hall, which is soon filled with elegant guests dressed in their finery. It seems that any fatigue from earlier in the day, and any shyness from earlier in the week, have evaporated. We have been through the heights and depths of our week-long journey and now it is time to simply enjoy this evening together.

As the evening progresses, the energy rises. Release and playfulness are in the air. There is a sense that anything could happen. Coming up to the mike on this evening can be an unpredictable, if not dangerous, experience. I remember once Toke Moeller came up to make a spontaneous toast. I don't even recall the content, except that it was profound in a way that only Toke can be, and in a way that was in stark contrast to the mood in the room. Still, Toke, holds great respect within the Institute community and people stayed with him. To make a point, Toke slammed his fist onto the podium. There was a long silence filled with a mixture of shock and the aftershock of wondering whether to buy in or label it "too much." Then Toke said, "And then there is Rule Number 5b, which is, Never take yourself too f**ing seriously." The room exploded into laughter and applause.

Another year, we decided to try fund-raising on that evening, to raise money for the next year's scholarship fund. It was risky. We asked David Rome, good friend of the Institute and co-module leader with Otto Scharmer that year, to make the pitch. David was mild-mannered, understated, and seemingly unflappable. He went to the front of the room and began. Nearby was a table of women who had bonded early in the week, at a pre-program workshop on women's leadership led by Susan Skjei and Frances Baldwin. Their group had become a fearless force. David was just a few sentences into his appeal when one of these women called out, "Would you auction your tie?"

"Excuse me?"

"Would you auction your tie?"

And so in a moment, David took off his tie and became an auctioneer. Who knew? Meg Wheatley donated her beautiful blue silk wrap (and threw in a matching necklace for good measure) and Sytske Casimir, from Switzerland, donated a one-of-a-kind necklace crafted in Iceland. Athletic Augusto Cuginotti donated his World Cup tee-shirt from Brazil. And so it went. This was the beginning of what became an annual tradition—to hold an auction on the last evening in support of the following year's scholarship fund. In future years, though, we gathered items from the local community as well as inviting people to bring their own contributions.

To me this is a great metaphor for genuine celebration. We are celebrating the richness we already have. Our joy and generosity arise naturally, because we have let go of the burden that comes from being too small, isolated, already-defeated. We celebrate the consciousness that rises when we come together with intention, inquisitiveness, humour, fearlessness, and gentleness.

Some say that humanity is on an evolutionary spiral moving towards higher consciousness. If you turn your head slightly, you might just as easily say that the spiral is heading downward, towards fundamentalism, unbridled materialism, and self-destruction. Both could be true. Or one, or neither. Hope and fear.

What I have learned through Shambhala and now ALIA is that "higher consciousness" is always available. It shines through in the midst of chaos and confusion, in the brilliance of others, and in the natural world. In my lifetime I have seen a shift of the dominant worldview from assuming the natural world is a passive, unlimited resource to be exploited, to one that recognizes that this resource is finite, and that our own survival and well-being are dependent on its well-being. And now yet another worldview is

dawning—that nature's intelligence is key to our future, if we are only able to listen, to shift how we pay attention and heal the fragmentation that separates us and makes us blind.

From nature we learn about the capacity, dynamics, and limits of living systems, and how to organize ourselves in more resilient and intelligent ways. For many of us, Meg Wheatley played a role in opening our eyes to this lesson, through her book *Leadership and the New Science.* Janine Benyus's breakthrough work in biomimicry has given us another lens, so that we can begin to see that the most sophisticated technological innovations and adaptations are already displayed in nature's genius. And when as a society we are driven by a sense of scarcity, no matter how much wealth we accumulate, the trees, fields, and oceans are there waiting for us to experience their quiet beauty and abundance, which is also our own.

So as individuals and communities practicing authentic leadership, our mission becomes clear. Through our own practice and presence, we stand on the ground of authenticity, our own nature. By aligning ourselves with systems as they unfold, we let life in, so that what is already whole, creative, and intelligent in our organizations and communities can awaken and shine through. We learn to ride the journey of fearlessness with skill and confidence, as well as with humor and humility.

Then we discover unconditional joy, which is not defeated by fear, not discouraged by the seasons of success and failure, and not dependent on false hopes. That joy is cause for genuine celebration, and it is the fuel that energizes our never-ending journey of authentic leadership in the midst of action.

Postscript

This Little Book is an exploration of some of the practices that have arisen in the context and container of the ALIA Institute. Behind them all is an allegiance to, and alignment with, the open ground of experience. Sometimes we call this ground authenticity, because whatever comes from that place rings true. It is timely, synchronized, not manipulated or distorted.

Writing this Little Book has been a chance to bring some of the connections between these practices to the surface. More like it, the connections have gradually revealed themselves. Along the way, I began to see a pattern that includes them all. On the day after the 2009 Summer Program, I used brush and ink to draw three shapes and wrote this reflection.

First the circle, already complete, already whole, opens a portal for everything.

Then the triangle, like a well fitted jacket or straight back, bounds the circle with three lines — of intention, mindfulness, and courage.

Next the square, symmetry of the hearth, sets the foundation and draws the perimeter of this time, this place.

Now moving into action, the pattern repeats.

The circle for wholeness of community, society, system.
The triangle for intentional, elegant, powerful moves.
The square for boundary and container.

Is this the essential pattern, continuously unfolding
at the heart of the journey?

ACKNOWLEDGEMENTS

There isn't room in this Little Book to include all the practices, resources, and stories worth sharing from the ALIA Institute's first ten years. Hopefully there will be many more books, large and small, dedicated to this purpose.

Similarly, it would be impossible to name all the people who have contributed their wisdom, courage, and authentic leadership to creating the Institute's rich field of learning and celebration. Some have been mentioned in the chapters of this book. Others include the founding group of the original Shambhala Institute, which was convened in the summer of 1998 by Michael Chender and which also included Denny Blouin, Paul Bowlby, Ken Friedman, Maggie Granelli, Tony Lamport, Joe Litven, David Sable, Susan Skjei, Joseph Szostak, and myself. Today Michael and Susan continue to steward the Institute as members of the board, which also includes Phil Cass, Claudia Chender, Aftab Erfan, Chris Grant, Mark Hazell, Martin Janowitz (current Chair), John Roy, and Sera Thompson. The staff began as a threesome: Robert Ziegler, Alan Sloan, and myself. Barbara Zielinski joined soon after. The current staff comprises Julia Creighton, Karen Densmore, Gabrielle Donnelly, Cara Lynn Garvock, and Ryan Watson.

From the beginning, the talented Shambhala arts team has played a key role in all the Institute's programs: Barbara Bash, Steve Clorfeine, Jerry Granelli, Lanny Harrison, and Arawana Hayashi.

Friends and thinking partners, many of whom have also played various faculty and facilitation roles, have included Lenneke Aalbers, Laurie Alexander, Robin Athey, Brian Bacon, Sue Bookchin, Paul Born, Juanita Brown, Chris Corrigan, Geoff Crinean, Jim and Margaret Drescher, Glenda Eoyang, Danny Graham, Mike Green, Lyn Hartley, Tom Hurley, Kathy Jourdain, Adam Kahane, Art Kleiner, Marianne Knuth, Tony Lamport, Lorri Lizza, Myrna Lewis, Michael Marlowe, Tim Merry, Toke Moeller, Wendy Morris, Monica Nissen, Wendy Palmer, Otto Scharmer, Peter Senge, Alan Sloan, Mary Stacey, Bob Stilger, Crane Stookey, Bill Torbert and Margaret Wheatley.

I would like to acknowledge and thank Phil Cass for his wise leadership as Chair of the Institute over the past three years, and for his encouragement to write this Little Book. I also offer a bow of appreciation to Barbara Bash for adding her beautiful illustrations, and to Jessica von Handorf for bravely jumping in to contribute her masterful graphic design skills to this, her first collaborative book design project.

Finally, I would like to dedicate this Little Book to all warrior-practitioners of authentic leadership, everywhere. May our practice and our actions dispel whatever darkness lies within our hearts, our communities and workplaces, and our world.

CONTACT US

For information about ALIA programs and partnerships:
www.aliainstitute.org

Notes and Resources

WELCOME

For more information about Shambhala see www.shambhala.org and also Chögyam Trungpa, *Shambhala: The Sacred Path of the Warrior* (Boston: Shambhala Publ., 1984) and other books by Chögyam Trungpa and Sakyong Mipham.

PLACE

Michael Jones is a pianist, speaker, and leadership educator.
See www.pianoscapes.com

Windhorse Farm is a demonstration and education centre for land stewardship. See www.windhorsefarm.org

"Meeting in the Dojo" by Larry Dressler, *Standing in the Fire: Leading High-Heat Meetings with Calm, Clarity, and Courage.* (Berrett-Koehler and ASTD, March 2010.)

"Lost" is from *Traveling Light: Collected and New Poems* ©1999 by David Wagoner. Reprinted with permission of the University of Illinois Press.

FRAMING

Epigraph: George Lakoff, *Don't Think of an Elephant! Know Your Values and Frame the Debate* (White River Junction, Vt.: Chelsea Green Publishing, 2004).

ATTENTION

Epigraph by Peter Senge is from *Leading from Within: Poetry that Sustains the Courage to Lead* (San Francisco, Calif.: Jossey-Bass, 2007). Compiled by the Center for Courage and Renewal.

David Rock, *Your Brain at Work: Strategies for Overcoming Distraction, Regaining Focus, and Working Smarter All Day Long* (New York: HarperCollins, 2009). Find more information on the applications of neuroscience to leadership at www.neuroleadership.org

Otto Scharmer's work is generously documented at www.ottoscharmer.com and www.presencing.com

Mindfulness resources include books by Pema Chödrön, Chögyam Trungpa, Thich Naht Hanh, Jon Kabat Zinn, and Michael Carroll, among many others.

"Standing at the Center of the World" by Pema Chödrön is from *The Wisdom of No Escape and the Path of Loving Kindness* (Boston: Shambhala Publ.,1991).

For more information about Arawana Hayashi's work see www.arawanahayashi.com

ALIGNMENT

Epigraph: Chögyam Trungpa, *Shambhala: The Sacred Path of the Warrior* (Boston, Mass.: Shambhala Publ., 1984).

Wendy Palmer's website lists books, CDs, and workshops in centering and other "conscious embodiment" exercises: web.me.com/wendyepalmer.

JUST NOTICING, SIMPLY ASKING

Epigraph: Chögyam Trungpa, *Ocean of Dharma* (Boston, Mass.: Shambhala Publ., 2008).

Epigraph: Alan Watts, *Nature, Man and Woman.* (New York: Pantheon Books, 1958).

Epigraph: Otto Scharmer, "Addressing the Blind Spot of our Time," the executive summary of Dr. Scharmer's longer work, *Theory U: Leading from the Future as It Emerges* (San Francisco, Calif.: Berrett-Koehler, 2007).

The listening practice is based on exercises led by jazz percussionist Jerry Granelli at the ALIA Summer Program.

The contemplative photography practice is based on Miksang photography. Miksang was developed by Michael Wood and is now also taught at the ALIA Institute by Helen Vink. "Seeing" exercises can be practiced anytime, anywhere; using a camera heightens this practice. See www.miksang.com and www.miksang.nl.

A World Café how-to guide and many other resources are freely available on The World Café website: www.theworldcafe.com. Also see Juanita Brown and David Isaacs, *The World Café: Shaping Our Futures Through Conversations That Matter* (San Francisco: Berrett-Koehler, 2005).

A guide to conducting dialogue interviews can be found at www.presencing.com/tools/dialogueint.shtml

For Appreciative Inquiry resources see appreciativeinquiry.case.edu

More information about Asset-Based Community Development is available at www.abcdinstitute.org. Mike Green brought the practice of ABCD to the

ALIA Institute: www.mike-green.org. In Nova Scotia, The Coady Institute, one of ALIA's partners in a rural leadership project, has been applying and refining a strengths-based approach in the context of international development for the past fifty years.

In his book *The Age of Heretics: A History of the Radical Thinkers Who Reinvented Corporate Management* (San Francisco: Jossey-Bass, 2008), Art Kleiner traces some of the historical threads that originated with the Royal Dutch Shell scenario team in the 1970s and became influential in the development of current multi-stakeholder change practices such as the Change Lab. Art Kleiner has led modules on scenario planning at the ALIA Institute. See also www.well.com/~art

RELATIONSHIPS THAT HOLD

Circle: www.peerspirit.com

The Art of Hosting: www.artofhosting.org

Deep Democracy: deep-democracy.net

DESIGNING FOR EMERGENCE

Epigraph: Glenda Eoyang, "Dancing with Uncertainty," an article in the April 2009 edition of *Attractors*, the Human Systems Dynamics newsletter. See www.hsdinstitute.org

Christopher Alexander et al, *A Pattern Language: Towns, Buildings, Construction* (Center for Environmental Structure,1977).

Adam Kahane recently published his "lessons learned" in his book *Power and Love,: A Theory and Practice of Social Change* (San Francisco, Calif.: Berrett-Koehler, 2010). In Canada, the Social Innovation Generation network has been accumulating and publishing their research. See, for example, Frances Westley, Brenda Zimmerman, and Michael Q. Patton, *Getting to Maybe: How the World is Changed* (Mississauga, Ont.: Random House Canada, 2006). Berkana Institute, the Presencing Institute, and other ALIA partners are also actively gathering and sharing information about the conditions that lead to successful innovation in systemic contexts of high complexity.

U Process: See Otto Scharmer's book *Theory U* and visit www.presencing.com

Change Lab: See Adam Kahane, *Solving Tough Problems: An Open Way of Talking, Listening, and Creating New Realities* (San Francisco: Berrett-Koehler, 2004); and *Power and Love (*Berrett-Koehler, 2010). Also visit www.reospartners.com.

Human Systems Dynamics: www.hsdinstitute.org

See Dee Hock, *Birth of the Chaordic Age* (San Francisco: Berrett-Koehler, 1999), and also the library on the Chaordic Commons website: www.chaordic.org.

"Chaordic Stepping Stones" excerpted from Chris Corrigan's blog: chriscorrigan.com

STRATEGIC ACTION

Epigraph: James Gimian and Barry Boyce, *The Rules of Victory: How to Transform Chaos and Conflict* (Boston: Shambhala Publ., 2008).
Learn more about the Canadian Social Innovation Generation network at sigeneration.ca

For more about Bob Wing and the Warrior of the Heart Dojo: www.interchange.dk/practices/warrioroftheheart/

Barbara Bash, book illustrator and calligrapher: www.barbarabash.com

More about raising windhorse and other practices can be found in Chögyam Trungpa, *Shambhala: The Sacred Path of the Warrior* (Boston: Shambhala Publ., 1984); and the posthumous *Smile at Fear: Awakening the True Heart of Bravery* (Boston: Shambhala Publ., 2009).

THINKING BIGGER

Epigraph: James Gimian and Barry Boyce, *The Rules of Victory.*

Epigraph: Leonard Cohen, from his song "Anthem": "Ring the bells that still can ring/ Forget your perfect offering./ There is a crack, a crack in everything./ That's how the light gets in."

"Inside" by David Abram is from "The Air Aware," an article in the September-October 2009 issue of *Orion Magazine.*

WARRIORSHIP

Epigraph: Trungpa, *Shambhala: The Sacred Path of the Warrior.*

"Riding the Horse" by Trungpa, ibid.

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