

## Case Study – Charitable Foundation

October 2009

This case study documents a supportive engagement with a medium-size spiritually oriented charity, where we were asked to support a group of trustees and administrative staff – 12 in all - who were finding their ongoing working relationships, as a board, unaccountably difficult. Despite being a group with strong loving ideals and a high level of personal care and respect for each other, governance conversations and decision making were becoming difficult and sometimes confrontational. A change of Chairperson was underway and one senior administrator was on long-term, stress-related sick leave. The charity decided to explore the value of Spiral Dynamics to assist in moving through the “stuckness” and difficulties they were experiencing.

Spiral Dynamics approaches such situations of confusion and “stuckness” with the premise that it is not the issues themselves that are causing the problem. The more traditional approach of negotiation and compromise can lead to patch-up solutions which unravel, and with conversations which come back to the table again. SDi focuses instead on the core Value Systems which are driving the dialogue and exchanges. Value systems are less about **what** people think than about **how** they think about the world. Many conflicts take place because the participants have a mismatch of systems which cause them to be unable to even see the importance that other points of view might have for those who are expressing them.

In order to find out where such mismatches are occurring, our first task was to have all those concerned answer the SDi CultureScan questionnaire and also to take the more detailed Change State Indicator test. The Change State test assesses the extent to which people are comfortable with the status quo. Where they desire change, it draws out whether they are feeling empowered and flexible to bring that change about, or whether they are experiencing a degree of entrapment that might lead to stress or to radical and potentially destructive attempts to bring a solution.

The CultureScan is a powerful and multi-dimensional tool, which investigates the individual value system profile of each group member, takes a view of the group values stack, and assesses how they see the organisation’s values orientation in relation to what they would individually and collectively wish it to be. It also gives information about thinking styles and orientation towards gradual / incremental change or towards radical re-thinking. This assists in understanding both the range of potential capacity to implement change, and the balance of capacities within the organisation for its regular business operation.

This information provides an illuminating background for new forms of conversations about the way that trustees and administrators are taking decisions. They can then begin to see for themselves more about how they think, how colleagues think, and how those different thinking processes affect the conversations.

Thus, prior to the workshop day, each participant had taken the surveys, and the results had been collated to form an overview from which to view things differently. The day opened with a shared meditation and an inspirational poem followed by individual expressions of the desires and expectations of the day.

The Spiral Dynamics theory was presented in simplified form, so that discussion of both individual and team profiles would have meaning. As facilitators we were able to provide both a deep theoretical overview, and experience as practitioners of using SDi within organisations ourselves. A basic understanding was offered of the different Value stages, the way in which people can shift forward and back through the options and why those shifts occur, alongside practical examples of usage in other organisations. This enabled participants to see how their most favoured systems and those of their colleagues would affect what they would say, and how they would say it. A powerful, deep and authentic conversation took place throughout the morning, where we looked together, not only at identifying the key issues themselves, but also at the nature of the interaction, and how participants might hear each other with greater recognition, and begin to understand the blend of voices that would be necessary for the consensual decisions that they desire.

The discussions revealed some critical areas which were creating the centres of disagreement. Together, we were able to focus on why some people were experiencing the organisation as overly hierarchical and top down in style, where others thought that there was a strong consensual style. Those who felt "oppressed" were able to understand more about the lenses through which they were evaluating their experience and see why their experience was different to others', and how to shift perspective. Those who were operating in more forthright, diverse and self-expressive ways were able to see how this might be impacting negatively on their colleagues.

The team also aired how the organisation, and the individuals within it, were taking different attitudes to money and abundance. These were causing difficulties in knowing how to use the reserves wisely, and in how to approach the task of creating an on-going monetary flow that would ensure reserves could be rebuilt when used.

The assessment of thinking styles revealed that there was a preponderance of right-brain, "analog" thinkers, and a relative shortage of the "digital" thinking that tends to ensure organised and detailed plans. This feature was present alongside a strong tendency towards preference for radical and fundamental change, which was making it more difficult to be effective when the situation demanded incremental adjustment and the maintaining and management of "business as usual".

The whole day was held within a strong holding energy and space, with inspirational poems read throughout, time for reflection and opportunities for individuals to talk through and speak of what was troubling them as individual difficulties and issues arose.

The experience for all participants was very positive and deeply impactful over a very short time. The feedback quoted at the close of this case study indicates that the engagement was successful, and contributed significantly to the well-being, performance and self-knowledge of individuals and the team. The day following the workshop, Trustees had their regular governance meeting, and the comments made below reflect the impact of the Spiral Dynamics perspective on their subsequent ability to shift their blocks and take their business forward. In addition, the intervention was considered so successful as to bring an invitation back to provide a similar session with 10 faculty members later in the same month.

Lynne Sedgmore  
Jon Freeman

November 2009

"As we learned about the major patterns of human behaviour, characterised in colour within Spiral Dynamics, it became self-evident that all are precious elements of our personal and collective evolution. In guiding our analysis of the patterns evident within our own group, our moderators allowed us to see these within that frame - important aspects of the whole - and enabled us to begin a dialogue about change which was better informed and more respectful than had been possible previously. We are hugely grateful and excited about the prospects for more successful working and greater harmony within our organisation.

*Senior Administrator*

Blessings to you both, dear Lynne and Jon. I still vibrate with joy - yes that is the word - and gratitude for our new understanding and sense of connection which began to emerge from your work with us. Gratitude seems a thin, inadequate word to express this. It will have to do for now! Jon, you are so deeply skillful and mindful in your work (mindful in that broad, Buddhist sense). It has been a blessing for us and I hope nourishes you at the same time."

*Chair of Trustees*

"Our day together had a wonderful clarity leading our group to work together from a far deeper understanding and respect than has been possible before. Jon took us through Spiral dynamics in the most graciously simple way - and our questions were handled insightfully and sensitively by both Lynne and Jon. I am amazed that one day could have such a tangible impact within our group - and am excited for us .....and for myself.....potentially transformational!"

In gratitude and love

*Trustee*

"The Spiral Dynamics day was incredibly insightful. The model was well-explained, but it was the discussions that were the most helpful, showing how our questionnaires revealed both individual values and the values that show up when we work together for the organisation. It has provided a common language that I'm sure we'll use to grow our understanding of, and compassion for, ourselves and each other."

*Trustee and Treasurer.*

"The model gave us a view of our group's individual and collective patterns - both strengths and tensions - that is enabling an expansive healing perspective. Focussed, passionate and insightful facilitation of both content and process made this possible. Deep thanks."

*Faculty Leader*

"Your presentation of the spiral dynamics model was captivating. I was trully engaged and challenged by the day. It gave me a lot to think about and a new and insightful way of understanding our organisations dynamics and set us something to aim for - to become "yellow".

Thank you and love and blessings to you both."

*Trustee*

“The holding of the day was strong and nourishing and enabled us all to go deep into difficult issues within a safe and trusting space. For this I am deeply grateful as I can now see where I was adding to the conflicts and how to change my own behaviours and perception”

Trustee

November 2009