

University of St. Thomas, Minnesota

## UST Research Online

---

Education Doctoral Dissertations in  
Organization Development

School of Education

---

2013

# How the Discipline of Energetics Fosters Double-Loop Learning: Lessons from Multiple Positivistic Case Studies

Kelly La Venture

*University of St. Thomas, Minnesota*

Follow this and additional works at: [https://ir.stthomas.edu/caps\\_ed\\_orgdev\\_docdiss](https://ir.stthomas.edu/caps_ed_orgdev_docdiss)



Part of the [Education Commons](#), and the [Organizational Behavior and Theory Commons](#)

---

### Recommended Citation

La Venture, Kelly, "How the Discipline of Energetics Fosters Double-Loop Learning: Lessons from Multiple Positivistic Case Studies" (2013). *Education Doctoral Dissertations in Organization Development*. 20. [https://ir.stthomas.edu/caps\\_ed\\_orgdev\\_docdiss/20](https://ir.stthomas.edu/caps_ed_orgdev_docdiss/20)

This Dissertation is brought to you for free and open access by the School of Education at UST Research Online. It has been accepted for inclusion in Education Doctoral Dissertations in Organization Development by an authorized administrator of UST Research Online. For more information, please contact [asle4660@stthomas.edu](mailto:asle4660@stthomas.edu).

How the Discipline of Energetics Fosters Double-Loop Learning: Lessons from Multiple  
Positivistic Case Studies

A DISSERTATION

SUBMITTED TO THE FACULTY OF THE  
COLLEGE OF EDUCATION, LEADERSHIP AND COUNSELING  
OF THE UNIVERSITY OF ST. THOMAS

By

Kelly La Venture

IN PARTIAL FULFILLMENT OF THE REQUIREMENT  
FOR THE DEGREE OF  
DOCTOR IN ORGANIZATION DEVELOPMENT

January 2013

UNIVERSITY OF ST. THOMAS

We certify that we have read this dissertation and approved it as adequate in scope and quality. We have found that it is complete and satisfactory in all respects, and that any and all revisions required by the final examining committee have been made.

Dissertation Committee

---

Alla Heorhiadi, PhD, EdD, Committee Chair

---

John Conbere, EdD, Committee Member

---

Eleni Roulis, PhD, Committee Member

---

Date



## Acknowledgements

It is my pleasure to acknowledge some of the friends and family who have contributed to this dissertation. I am grateful to Dr. Alla Heorhiadi for her life-changing Energetics courses, as well as her support, and inspiring personal and intellectual style. Alla's approach to Energetics, learning and organization development have been a constant inspiration to me. It has been a privilege to have Alla serve as dissertation chair and share in my enthusiasm for the discipline of Energetics. While Alla helped me to always see the big picture and provided excellent advice on the dissertation prospectus, Dr. John Conbere and Dr. Eleni Roulis helped me refine the dissertation by offering valuable feedback that challenged my thinking.

Thank you to the participants in this research, this study would not have been possible without your stories, examples, and genuine enthusiasm for Energetics.

I thank my son Ryley La Venture for his love and patience throughout the doctoral process. The depth of my love for you is immeasurable. I am both blessed and honored to be your mom. I appreciate your hugs, humor, and willingness to let mom study, type, learn and grow. You have already become such a wise and loving young man, I am so proud of you!

My parents, Ed and Lynn La Venture, have provided much moral support during this educational journey. You have always believed in me and encouraged me to keep moving onward; I love you both, and please know that your support has been so greatly appreciated.

Amy La Venture, Patrick La Venture, Michele, Chris, and Campbell Gowdy, Florence Barlow, and very importantly Ray Barlow thank you all for being there for me; whether it was discussing philosophy and the social sciences, offering a word of encouragement, laughing together over a glass of wine, or taking a break from it all to play cards or watch Campbell perform on stage. I love you all and I miss you dearly Ray.

## **Abstract**

Creation of learning organizations is a topic of increased interest to Organizational Development practitioners. Previous research has established that creating and sustaining a learning organization may be achieved by fostering a double-loop learning process among its employees. A double-loop learning process, in turn, requires employees to become both self-reflective and capable of critically examining assumptions underlying their behavior. Among other techniques, the discipline of Energetics is understood to help in participants' double-loop learning. However, this understanding thus far lacks an empirical examination. The present study is conducted to fill this gap. Conducted as a positivistic case study, this study explored the following research question: How application of skills and concepts learned from the discipline of Energetics fosters double-loop learning? Data were collected through interviewing 16 graduates of the Energetics Institute. Data supported the posited theory that Energetics led to double loop learning.

## TABLE OF CONTENTS

INTRODUCTION AND BACKGROUND .....	1
A General Overview of the Problem .....	1
Problem Statement.....	6
Purpose of the Study and Research Question .....	6
Research Design .....	7
Definition of Key Terms.....	7
Critical Reflection.....	8
Double-Loop Learning .....	8
Energetics .....	8
Self-as-Instrument.....	8
Single-Loop Learning.....	9
LITERATURE REVIEW .....	10
Energetics .....	10
Subtle Energies .....	10
The Living and Divine Matrices.....	11
Quantum Approaches .....	14
Discipline of Energetics.....	15
Single and Double-Loop Learning .....	16
Model 1 and Model 2 Organizations .....	18
Critical Reflection and Self-as-Instrument .....	20
Critical Reflection.....	20
Self, Self-as-Instrument and Self-Awareness .....	21
Organizational Learning and Learning Organizations .....	23
Summary.....	29
METHODOLOGY .....	31
Research Design and Rationale .....	31
Participant Selection Criteria.....	33
Theory Development .....	34
Theory Description .....	35
Units of Analysis .....	36
Laws of Interaction .....	37
Boundaries .....	37
System States.....	37
Propositions .....	38
Data Collection Methods and Interview Protocol .....	39
Ethics and Procedures for the Protection of Human Subjects .....	43
Data Analysis and Criteria for Interpreting Findings .....	44
Quality Control .....	45
Summary.....	45
FINDINGS.....	47
Participant Profile .....	47

Participants' Case-by-Case Responses .....	48
Case 1.....	48
Case 2.....	51
Case 3.....	54
Case 4.....	57
Case 5.....	60
Case 6.....	63
Case 7.....	65
Case 8.....	69
Case 9.....	73
Case 10.....	77
Case 11.....	80
Case 12.....	83
Case 13.....	85
Case 14.....	88
Case 15.....	90
Case 16.....	92
Summary of Participant Case-by-Case Responses .....	95
Cross-Case Analysis .....	97
Cross-Case Findings Summary.....	102
 DISCUSSION.....	 103
Summary of Findings .....	103
Discussion of Findings .....	103
Self-as-Instrument of Change .....	105
Organization Development Practitioner Competencies.....	105
Self-as-Instrument and Double-Loop Learning.....	106
Energetics Training.....	108
Organizational Learning .....	109
Summary of Discussion.....	110
Significance of the Study.....	111
Limitations and Future Research .....	111
Conclusion .....	112
 REFERENCES .....	 114
 APPENDICES .....	 123



**APPENDICES**

A	Email Recruitment Letter to Energetic Institute Graduates.....	123
B	Informed Consent Form.....	124
C	Interview Protocol .....	126

## List of Tables and Figures

1	Twenty Keys of Conscious Creation .....	13
2	Thematic and Definitional Landscape of Learning in Organizations.....	24
3	Research Design .....	31
4	Energetics Coursework .....	34
5	Interview Protocol .....	40
6	Participant 1 Unit of Analysis Responses.....	51
7	Participant 2 Unit of Analysis Responses.....	54
8	Participant 3 Unit of Analysis Responses.....	56
9	Participant 4 Unit of Analysis Responses.....	60
10	Participant 5 Unit of Analysis Responses.....	62
11	Participant 6 Unit of Analysis Responses.....	65
12	Participant 7 Unit of Analysis Responses.....	69
13	Participant 8 Unit of Analysis Responses.....	73
14	Participant 9 Unit of Analysis Responses.....	76
15	Participant 10 Unit of Analysis Responses.....	79
16	Participant 11 Unit of Analysis Responses.....	82
17	Participant 12 Unit of Analysis Responses.....	85
18	Participant 13 Unit of Analysis Responses.....	87
19	Participant 14 Unit of Analysis Responses.....	89
20	Participant 15 Unit of Analysis Responses.....	92
21	Participant 16 Unit of Analysis Responses.....	95
22	Aggregate Participant Ratings .....	96
23	Unit #1 – Ability to Reflect Critically on Behavior .....	97
24	Unit #2 – Ability to Identify Values or Assumptions that Contributed to the Problem.....	99

25 Unit # 3 – Ability to Change Their Underlying Values or Assumptions .....100

26 Unit #4 – Ability to Change Their Behavior .....101

1 Single-Loop and Double-Loop Learning.....17

2 How the Discipline of Energetics Fosters Double-Loop Learning .....36

## **Chapter I: Introduction and Background**

### **A General Overview of the Problem**

Every day brings people the opportunities, both in their professional and personal lives, to make good decisions, exercise their consciousness, and behave wisely. While some decision-situations may present complex moral dilemmas, often people can easily recognize the morally correct course of action in any given situation. Recognizing a morally correct action does not, however, lead to acting upon it. The field of moral psychology (Greene & Haidt, 2002; Jordan, Mullen, & Murnighan, 2011; Taylor, 2008; Taylor, 2011; Zimmerman, 2009) is replete with studies that investigate the incongruence between people's ethical judgments and their ultimate actions. This incongruence not only raises ethical concerns but may also be a source of a great many organizational problems. What is more, people often fail to even pause for a moment to ponder upon the reasoning for their decision to pursue unethical action, much less consider the assumptions and values underlying their decision making process. In more extreme cases, people even completely evade the guiding thought toward a "correct" action and engage in acts that could be called acts of self-deception (The Arbinger Institute, 2002). By doing so, people tend to blind themselves to the true cause of their problems that may arise out as the consequences of an "incorrect" action. In such cases, individuals not only create problems for themselves, but also often act to cover up problems and justify their choices and behavior (The Arbinger Institute, 2002).

Every day brings people opportunities to become more self-aware; to develop increased awareness of the subtle energies – or "forces that are delicately complex and precise but also that have a power all their own, able to affect all aspects and manner of our world and of us people within this world" (Anderson, 2003) around them; and to engage in acts of critical reflection.

However, often, people choose to continue on the same, routine path without engaging in processes that may lead to increased self-awareness and self-development. Further, people choose to ignore the alternative actions and the underlying assumptions and governing values behind their chosen action. All in all, taking recourse to a routine behavior prevents people from harnessing an otherwise promising opportunity for deeper level self-learning and behavior transformation. Such opportunities keep repeating themselves, yet people keep ignoring the signals that indicate a “correct” action in a given situation. The world needs employees and leaders who pay attention to these signals, and can think wisely and reflect critically on their own underlying assumptions, values and decision-making.

While social norms have their usefulness in regulating social life, they also limit out of box thinking and reinforce an idea that people should conform to a prescribed behavior (Thøgersen, 2008). It is argued that like any other pattern of organizational action, an individual’s patterns of action, behavior and ways of thinking are open to alteration and reconfiguration (Cooperrider, Sorensen, Yaeger, & Whitney, 2001). Socially constructed decision making norms may fail to provide right solutions, and when acting for the benefit of society is in conflict with people’s values, only those who can develop new ways of thinking without being held captive to those norms can stand up to the challenge. Those are situations when people must challenge prescribed behaviors by discarding conditionally conforming to the norms and instead stand up to change their own behavior and ways of thinking. Such new ways of thinking may be supported through education imparted by leadership institutes, professional development seminars, and experts’ counseling (i.e., one-on-one coaching, psychotherapy, Energetics coaching, etc.). At the core of alteration and reconfiguration of an individual’s

thinking and action, however, remains the challenge of changing one's individual consciousness, which is essentially a do-it-yourself job (Algeo, 1987).

Changes in consciousness can be achieved by challenging the ways of thinking about self, others, and larger systems. Challenging these fundamental notions empowers an individual to actively participate in his/her own life and thus provides deeper meanings for an individual. A significant aspect of developing a challenging mindset comes by accepting the science and embracing scientific evidence that indicates the existence of subtle energies in the universe (Anderson, 2003; Drury, 2009; Gerber, 2001; Tiller, 1993; Tiller, 2004; Wilber, 2005), which in turn, suggest connections, overlaps and links among all existing units within the Universe.

People differ from one another in a myriad of ways. Regardless of their life histories, or worldviews, people are connected at the Energetic level wherein their every thought and behavior is likely to impact others. An analogy may be drawn to the 2009 American epic science fiction film that features Avatars connected to the Sacred Tree of Souls. The Avatars were shown to have connected with each other and their universe on an Energetic level and to have the ability to move energy as desired. Even the Avatars recognized what Algeo (1987) observed long ago, "evolution does not proceed in hermetically sealed compartments" (p. 131) and that one's evolution impacts the universe on a much grander scale – which is also referred to as the butterfly effect. Stemming from the scientific field of chaos theory, popular explanations of the butterfly effect allude to the idea that the flutter of a butterfly's wings in Brazil may set off a chain of events that, over time, leads to a tornado in Texas (Riley, 2006). Another way to think of this phenomenon "is that our small behaviors have a 'butterfly effect' on how others perceive us" (Riley, 2006, p. 270). As such, metaphysical believers said that everything is cut of the same cloth so that everything is linked to everything, and that "one piece of the universe can operate or

act on any other piece of the universe, with the guiding power of mind for steerage...”

(Albanese, 1999, p. 308). Considering the notion that we are all connected, when we behave kindly to others this may positively affect the way others view us and have positive implications for us in future interactions.

Believing in such a cosmic connectedness also leads to an understanding that what one does in one part of life has an effect and influence on other parts of life (Algeo, 1987). This understanding is implied in the notion of karma, which suggests that every action has an inevitable, inescapable consequence for oneself (Algeo, 1987). Perhaps, recognizing and believing in karma emanates from the ability to transcend routine senses. This transcendence is often referred to as intuition; which is another way to describe one’s ability to feel or sense the forces of the universe, also known as subtle energies. Heorhiadi and Conbere (2008) specified, the term energy is broadly used to describe powerful yet subtle forces that affect everything from the physical to the non-physical, this term is becoming more common in today’s society where people are looking for help to reduce stress, heal physical ailments, manifest desires and wishes, and live happier lives.

Perhaps one way of realizing higher levels of consciousness could be done through critical self-reflection and introspection of one’s own values, underlying assumptions and the way in which one views and makes meaning of the world. This is a phenomenon which Argyris (1976) called double-loop learning, and is an important tool for organizational studies (Bokeno, 2003; Karakas, 2009; Korth, 2000).

Double-loop learning requires that new routines be created that are based on the way we know what we know. Argyris (1993; 1995; 1998; 1999; 2002; 2003) has extensively examined double-loop learning from an organization development and management perspective. Double-

loop learning occurs when a mismatch between intention and outcome is detected and corrected by changing underlying values and assumptions (Argyris, 2002). But how the application of skills and concepts learned from the discipline of Energetics fosters the process of double-loop learning has received far less attention. Heorhiadi and Conbere (2008) defined Energetics as the interdisciplinary practice that involves the application of the knowledge of subtle energies in the universe to promote individual and organizational healing. Since organizations learn through individuals acting as agents, the detection and correction of individual error leads to organizational learning (Argyris & Schön, 1974). Those who choose to engage in the application of skills and concepts learned from the discipline of Energetics are essentially acting as agents of change focused on challenging and changing the values and assumptions underlying their own behavior.

Upon failing in any undertaking, people typically employ single-loop learning techniques for reflecting upon the outcome and for processing the various underpinning information. Employing single-loop learning, however, very much reinforces the same decision making framework, which led to decisions that resulted in the outcome being reflected upon. Argyris (1998) argued that this kind of learning creates a primary inhibited loop for learning, an overall detrimental situation for learning in organizations. It is further argued that by falling in a single-loop learning trap, people may even 'prime the single-loop learning pump' and even exacerbate their problems in both their personal and professional spheres/realms.

While practicing single-loop learning may lead to a state of non-learning when people basically deceive themselves by constantly remaining within the bounds of same decision making framework, they also have an alternative of avoiding to engage in acts of self-deception (The Arbing Institute, 2002) through raising self-consciousness and by not conforming to



predisposed, routine patterns of reactions to a given stimuli. By choosing the latter, people can harness the benefits associated with double-loop learning, which can, in turn, be tremendously helpful for overall organizational learning. As a key organizational characteristic, organizational learning – defined by Kim (1993), as a process designed to increase an organization’s capability to take effective action – continues to be a pressing imperative for modern day organizations that operate in a highly complex and dynamic environment.

### **Problem Statement**

There is a need to foster a generation of critically reflective people who can help build learning organizations, which is a key imperative facing modern business. Creating and sustaining a learning organization may be achieved by fostering a double-loop learning process among its employees. A double-loop learning process, in turn, requires employees to become both self-reflective and capable of critically examining assumptions underlying their own values, decisions, and actions that led to certain outcomes. These capabilities may be enhanced using techniques and tools of the principles of Energetics, and/or T-groups, among other professional development methods. The lack of empirical demonstration, however, has prevented these techniques and tools from becoming mainstream practices for organizations to promote double-loop learning among its employees and thereby creating a learning organization. This researcher purports to fill this gap.

### **Purpose of the Study and Research Question**

The purpose of this study is to test the researcher’s proposition that application of skills and concepts learned from the discipline of Energetics fosters the process of double-loop learning. In order to achieve this broad objective, the researcher specifically purports to seek an

answer to the following overarching question: How the application of skills and concepts learned from the discipline of Energetics fosters double-loop learning?

### **Research Design**

Yin (2009) suggested the use of case study in research that intends to investigate “how” and “why” questions; in which no control over behavioral events are required; and where the focus is on contemporary issues. Also case studies allow for a holistic study of a phenomenon (Yin, 1992; 1993). In this study, not all of the potentially important variables are known hence the researcher’s selection of a case design is appropriate. However, since the researcher herself has undergone training at the Energetics Institute, drawing from her experience she developed, *a priori*, the broader study framework which is posited to consist of five elements, which are reflection, identification, changes in values and assumptions, changes in action/behavior, and double-loop learning, the researcher chooses to employ a positivist case study method.

Data was collected from 16 graduates of the Energetics Institute. Therefore, this study employed a multiple-case study design. A more detailed description of the research approach and design is provided in Chapter 3.

In case studies, the researcher is the instrument (Yin, 2009). Accordingly, this researcher’s own suitability to conduct this research was important. The researcher believed to have the capability to maintain empathetic neutrality, to have been a good listener, and to have the skills to have elicited deeper responses with minimum intervention. The researcher had first-hand experience of the Energetics schooling; and was able to effectively seek deeper explanations without giving an impression of being too investigative.

### **Definitions of Key Terms**

To prepare readers for review of this study a glossary of common terms and definitions for the purpose of this research study are provided below in alphabetical order.

**Critical Reflection.** Mezirow (2000) described critical reflection as the process of precipitating transformation in frames of reference by surfacing and challenging uncritically assimilated assumptions about oneself and one's world. "Reflection as a management learning concept is expressed primarily as a key element of problem solving" (Reynolds, 1998, p. 183). "Critical reflection engages participants in a process of drawing from critical perspectives to make connections between their learning and work experiences, to understand and change interpersonal and organisational practices" (Rigg & Trehan, 2008, p. 374).

**Double-Loop Learning.** According to Argyris (1999; 2003); double-loop learning occurs when a mismatch or inequality is detected and then corrected by first changing the underlying values and other features of the status quo thus requiring that new routines be created based on now differing conceptions of the universe.

**Energetics.** Heorhiadi and Conbere (2008) defined "Energetics as the discipline that involves application of the knowledge of the universe supplied by quantum physics and some ancient traditions, to promote individual and organizational healing" (p. 36).

**Self-as-Instrument.** In whatever the current situation is presenting, the use of self and self-as-instrument of change is the "conscious use of one's whole being in the intentional execution of one's role for effectiveness" (Jamieson, Auron, & Shechtman, 2010, p. 5) and "simply knowing more about yourself to deeper recognitions of consciousness, choice, shadows, agency, behavior patterns, developmental theories, and intentionality" (Jamieson et al., 2010, p. 4).

**Single-Loop Learning.** According to Argyris (2003), single-loop learning occurs when a mismatch or inequality is detected and corrected while remaining within the accepted routines and without change of the underlying values and status quo that govern the behaviors.

## Chapter 2: Literature Review

The present research was built upon four primary areas of scholarship: Energetics, double and single-loop learning, the role of critical reflection and self-as-instrument in personal and professional development, and the notion of a learning organization. In the sections that follow, a synopsis of the relevant literature in each of these areas is provided.

### **Energetics**

Perhaps a way to change one's behavior and bring one's whole self to life and work is by understanding and accepting the notion of subtle energies in one's known and unknown realms, the living and divine matrices, quantum approaches, and their collective applicability to the discipline of Energetics. Further, understanding the living and divine matrices, quantum approaches and subtle energies in the universe are keys to understanding the significance of Energetics on double-loop learning. These principles – addressed consistently in the literature – served as the organizing principle for the review of literature on Energetics and were surveyed in the following sub-sections.

**Subtle Energies.** According to Heorhiadi and Conbere (2008), in some Eastern philosophies, “energy is often referred to as ‘subtle matter’, which has high frequency vibrations and, thus, is less dense than physical matter” (p. 36). Thus, “the energies activating a person are subtle or very low intensity” (Srinivasan, 2010). Tiller (2004) defined subtle energy fields as low intensity fields that are not produced by original forces such as gravity, electromagnetic and nuclear forces. Subtle energies “are forces that are delicately complex and precise but also have a power of their own, able to affect all aspects and people of our world ” (Anderson, 2003, p. 83). If one accepts that subtle energies, or forces, exist in our interconnected universe, then one should perhaps accept the suggestion from Spoth (2006), that there is a subtle Energetic system

in every individual which radiates subtle energies and which is inseparable from the biological body. These subtle energies are created by molecular, cellular, tissue, and system oscillations that combined with one's thoughts, feelings; and a separate energy system, also contribute to the bioenergetics field that surrounds an individual (Spoth, 2006). It is in the bioenergetics field, or subtle state, that "human consciousness and experiences overlap and interact with one another, and the causal states that tend to embody the creative force from which all human experiences arise" (Anderson, 2003, p. 85). Anderson (2003) maintained that a majority of the various therapeutic interventions, addiction treatments, and all sorts of psychological practices are focused on helping individuals to understand themselves and their places in the world. Focusing on one's understanding of how consciousness and human energy can be understood and managed effectively can do this. It is here, in the subtle state, that one can explore and change the high frequency vibrations being emitted, thus impacting one's behavior, health and human experiences.

**The Living and Divine Matrices.** Consistent with the suggestion by Spoth (2006), that there is a subtle Energetic system in every individual, scientific evidence has accumulated that suggests the existence of a body-wide communication system, or living Matrix, that is essential for the survival of all living things and supports the notion that all living beings and Energetic systems are connected with the Earth (Oschman, 2009; 2010). Oschman (2009) defined the living Matrix as, "the continuous molecular fabric of the organism, consisting of fascia, other connective tissues, extracellular matrices, integrins, cytoskeletons, nuclear matrices, and DNA" (p. 218). The extracellular matrices are dynamic and vibrant and alive with vital roles in virtually all physiological processes with the ability to send signals virtually instantaneously throughout the system (Oschman, 2009).

There is also evidence of the existence of another logic Defying Matrix within the universe, called the Divine Matrix (Braden, 2007). The Divine Matrix is an energy field, which is a tightly woven web of subtle energies that makes the fabric of the universe and of our reality (Braden, 2007). The Divine Matrix can be thought of as, “the container for the universe to exist within; the bridge between our inner and outer thoughts; and the mirror that reflects our everyday thoughts, feelings, emotions and beliefs” (Braden, 2007, p. 54). Braden (2007) suggested that there are three attributes that set the Divine Matrix apart from other energy; first, it is everywhere all the time – it already exists; this field originated when creation did; and that the field has intelligence and responds to the power of human emotion. “It’s what space itself is made of” (Braden, 2007, p. 57). To further explain the concept, Braden (2007) suggested that humans are not mere passive beings in our universe, but rather they create their own reality. Table 1 below outlines the twenty keys that according to Braden (2007) encapsulated the notion of reality making. Several of the keys of conscious creation (Braden, 2007) are implicit in the discipline of Energetics – such that everything in our world is connected to everything else, and people have an astounding impact on the world because they are part of it rather than separate from it.

Table 1  
*Twenty Keys of Conscious Creation*

<b>Key 1</b>	The Divine Matrix is the <i>container</i> that holds the universe, the <i>bridge</i> between all things, and the <i>mirror</i> that shows us what we have created.
<b>Key 2</b>	Everything in our world is connected to everything else.
<b>Key 3</b>	To tap the force of the universe itself, we must see ourselves as <i>part of</i> the world rather than <i>separate from</i> it.
<b>Key 4</b>	Once something is joined, <i>it is always connected</i> , whether it remains physically linked or not.
<b>Key 5</b>	The act of focusing our consciousness is an act of creation. Consciousness creates!
<b>Key 6</b>	We have all the power we need to create all the changes we choose!
<b>Key 7</b>	The focus of our awareness becomes the reality of our world.
<b>Key 8</b>	To simply <i>say</i> that we choose a new reality is not enough!
<b>Key 9</b>	Feeling is the language that “speaks” to the Divine Matrix. Feel as though your goal is accomplished and your prayer is already answered. Page 85.
<b>Key 10</b>	Not just any feeling will do. The ones that create must be without ego or judgment.
<b>Key 11</b>	We must <i>become</i> in our lives the things that we choose to <i>experience</i> as our world.
<b>Key 12</b>	We are not bound by the laws of physics as we know them today.
<b>Key 13</b>	In a holographic “something,” every piece of the something mirrors the whole something.
<b>Key 14</b>	The universally connected hologram of consciousness promises that the instant we create our good wishes and prayers, they are already received at their destination.
<b>Key 15</b>	Through the hologram of consciousness, a little change in our lives is mirrored everywhere in our world.
<b>Key 16</b>	The minimum number of people required to “jump-start” a change in consciousness is $\sqrt{1}$ % of a population.
<b>Key 17</b>	The Divine Matrix serves as the mirror in our world of the relationships that we create in our beliefs.
<b>Key 18</b>	The root of our “negative” experiences may be reduced to one of three universal fears (or a combination of them): abandonment, low self-worth, or lack of trust.
<b>Key 19</b>	Our true beliefs are mirrored in our most intimate relationships.
<b>Key 20</b>	We must become in our lives the very things that we choose to experience in our world.

Adapted from: Braden, G. (2007). *The divine matrix: Bridging time, space, miracles and belief*. New York, NY: Hay House.

Similar to Braden’s (2007) belief suggesting that one holds his or her own power to create reality, Hay (1984) stated, “what we think about ourselves becomes the truth for us” (p. 1). There are several studies that supported with data the premise of interconnectedness with one another, the earth and the universe. In one such study by Ghaly and Teplitz (2004), subjects reported that it took less time to fall asleep while grounded to the earth. In a separate study, a



team of renowned scientists from around the world found out that focused group intention affects scientifically quantifiable targets – animal, plant, and humans (McTaggart, 2007). Evident in these studies are the existence of subtle energies, living and divine matrices, and the interconnectedness of all that is present in the universe.

**Quantum Approaches.** The quantum approach and the field of quantum mechanics are abounding with evidence of interconnectedness in the universe. Perhaps everything in life is mind-over-matter.

Quantum mechanics is the discipline involving the study of subatomic particles in motion, in which the movement of these subatomic particles seemingly violates Newton's laws with their random and unpredictable behavior (Karakas, 2009). These subatomic particles are also referred to as subtle energies, and it has been suggested by Shelton and Darling (2001), that human beings are indeed quantum beings, that is, human beings are Energetic beings. This evidence is consistent with the findings presented by Oschman (2009) that people are living matrices and by Spoth (2006), that there is a subtle Energetic system in every individual.

There is also compelling evidence of the existence of many forms of energy and their impacts on individuals and the universe (Anderson, 2003). Everything in the universe literally pulsates with some form of energy and this energy is the vital force that enables every complex system to do its work and fulfill its purpose (Spoth, 2006). While this is a paradigm shift for many, subtle energies and quantum approaches are becoming more commonly accepted worldwide and emphasized. In the 21<sup>st</sup> century, societies are beginning to understand and accept the increased interdependency between individuals, groups, families, communities, nations, and the biosphere (Karakas, 2009). The holistic and quantum approaches have gained particular momentum in the field of organization development (Karakas, 2009) as it relates to wholeness,

with managers and employees bringing their whole self to work, including their bodies, minds and spirits (Daft & Lengel, 2000).

**Discipline of Energetics.** Recently Clawson (2008) defined leadership, as managing energy of self and then in others, and further suggested that the biggest leadership and organizational issue is the inability of people to lead themselves. From the time immemorial, human beings have combined energy work and self-work, albeit without these labels. Eden and Feinstein (2008) described Energetics as a process that allows people to explore how subtle energies shape the way they feel, the way they think, and the way they live. In fact, without explicitly using the term Energetics, many religions of the world encourage people to listen to their bodies vibrational sensations and suggest that people be “sensitive to subtle energies and respond to them” (Albanese, 1999, p. 310). For example, Buddhists and Hindus have practiced methods of meditation and concentration for centuries, and both are widely practiced today. The idea of combining energy work and self-work has moved into more mainstream practices, such as with Yoga (Nagendra, 2009), Qigong (Horrigan & Horrigan, 2007), and Tai Chi (Taylor-Piliae, Haskell, Waters, & Froelicher, 2006) where there is a focus on one’s Energetic plane and the pursuit of finding harmony in life and integration with the universe.

Spoth (2006) suggested that the term energy is omnipresent in popular OD literature. There are a vast number of texts, articles, religious documents, and how-to books on Energetics, spirituality, vibrational medicine, quantum physics, quantum mechanics, and meditation. Furthermore, the Energetics Institute contains a breadth of information and rich database about Energetics and Energetic practices. With the acceptance of the evidence, theories, ideas, and practices presented in said literature one may experience a shift in the way one sees self and the place in the world. Moreover, through the application of skills and concepts from the discipline

of Energetics and the acceptance that we are Energetic beings or living matrices (Oschman, 2009) and that that humans create their own reality (Braden, 2007) one's values, assumptions, mental models, and patterns of behavior may begin to shift – thus is the essence of double-loop learning.

### **Single and Double-Loop Learning**

Much of the foundational work in the field of double-loop learning can be attributed to Chris Argyris. Argyris began his career with an interest in reducing injustices. As Argyris (1975; 2003) studied the injustices inhibited by liberating alternatives, he found that people were self-sealing, compulsively repetitive, and non-interruptible and changeable. He further suggested that human beings were skillful at maintaining these corrosive and non-learning features due to their inability to learn; to detect and to correct errors. To further explicate why human beings were skillful at non-learning, Argyris (2003) distinguished between single-loop and double-loop learning (Figure 1).

Single-loop learning remains within the accepted routines and “occurs when a mismatch is detected and corrected without changing the underlying values and status quo that govern the behavior” (Argyris, 2003, p. 1178). On the other hand, double-loop learning occurs when a mismatch is detected and corrected by first changing underlying values and other features of the status quo” (Argyris, 2003, p. 1178-1179). For double-loop learning to occur, new routines must

be created that are based on a different conception of the universe (Argyris, 1999).

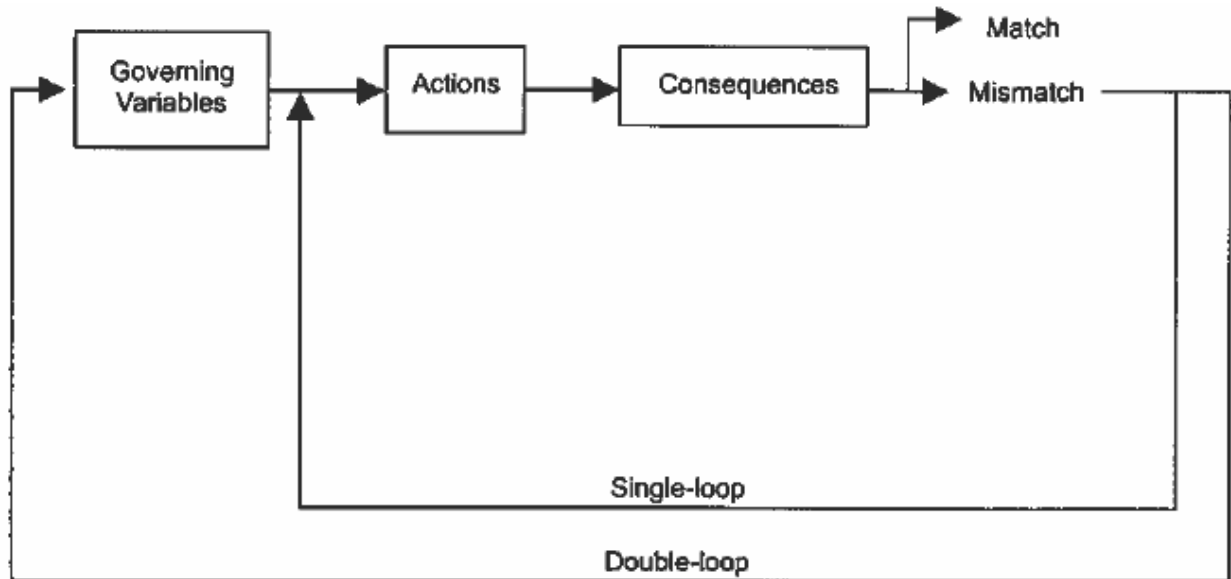


Figure 1. Single-loop and double-loop learning.

Korth (2000) stated, “people are programmed in ways that predispose them toward single-loop learning and that people in our society do not tend to develop double-loop learning skills” (p. 90). As a result, there are discrepancies, or mismatch, between people’s intentions and their actions based on their predisposition to approach a problem or an opportunity in a certain way (Korth, 2000). Ironically, “people often recognize the need for double-loop learning and think that they are behaving in a manner while they are actually engaging in single-loop actions” (Korth, 2000, p. 90).

Just as there is incongruence between individual intentions and behavior, there is incongruence with organizational intentions and behavior. Snell and Chack (1998) addressed this as organizational single-loop learning, wherein changes are made in the organization’s competency and knowledge base without altering present objectives, policies or mental maps. Single-loop learning is further perpetuated in organizations by the acceptance of tacit knowledge and tacit learning and giving much less consideration to the serious need for explicit knowledge

and learning (Keating, Robinson, & Clemson, 1996). This single-loop organizational learning manifests itself as a consolidation process (Snell & Chack, 1998), whereas double-loop organizational learning occurs when changes were made in the overall knowledge and competency base through the development of new objectives, policies, mental maps, and reframing of problems. Double-loop learning manifests itself as a transformative process (Snell & Chack, 1998). Argyris and Schön (1974) identified two such organizational models and subsequently named them Model 1 organizations and Model 2 organizations.

**Model 1 and Model 2 Organizations.** In Model 1 organizations, people are told what to do and there is little room for dialogue and expression of personal opinion. Control is demonstrated and as a result win/lose situations develop, people get defensive and begin to repress negative feelings. Defensive reasoning creates challenges for both individuals and organizations in moving forward. It occurs when individuals hold premises the validity of which is questionable, yet they think they are not. It occurs when individuals make inferences that do not necessarily follow from premises, yet they think they do, and reach conclusions that they believe have been tested carefully, yet they have not because the way they have been framed has made them untestable (Argyris, 1975). All organizations contain in varying amounts skilled incompetence, organizational defensive routines, organizational fancy footwork and the consequences of these factors. This is known as organizational defense pattern and is responsible for creating habitual patterns for organizations and organization malaise (Argyris, 1975).

In single-loop learning, new actions are devised without exploration of underlying motivations and assumptions and furthermore, this learning protects both the known and unknown underlying assumptions and often perpetuates an “us versus them” pattern of thoughts and behaviors (Argyris, 1975).

Model 2 organizations, as identified and described by Argyris (1975), practice dialogue and require action to validate information – such as with action learning and research. The cycles demonstrate free choice, validity, internal commitment, and brings out conflict and encourages and allows feelings (Argyris, 1975). Model 2 theory-in-use promotes constructive dialogue and conflict management within cultures and for people. There is use of valid information, use of free and informed choice, and maintenance of internal commitments to the choice. Overcoming organizational defense patterns involve Model 2 theories-in-use practices, such as: 1) diagnosing the problem, 2) connecting the diagnosis to the actual behavior of the people, 3) showing them how their behavior creates organizational defenses, 4) helping them change their behavior, 5) changing the defensive routine that reinforced the old behavior, and 6) developing new organizational norms and culture that reinforce the new behavior (Argyris, 1975).

Double-loop learning focuses on the collection of valid information, bringing conflicting views to the surface, and expecting free choice and commitment from all (Argyris, 1975). Double-loop learning is the detection and correction of a problem, wherein correction requires changes not only in action strategies but also in underlying values. Changing the individual and organizational habits requires double-loop learning. For double-loop learning to occur, individuals must be open to change and critical self-reflection. With double-loop learning, individuals identify and challenge their underlying assumptions and motivations. Through this process, the individuals' underlying assumptions, which previously remained implicit or unchallenged, are now exposed. Individuals analyze these underlying assumptions and also analyze how they guide goals, values, and strategies, and the end results. These individuals then learn by reflecting on this entire system, and this learning opens the door to changes in thoughts and behavior (Argyris, 1976).

In simplistic terms, Model 1 organizations and single-loop learning is designed to guard implicit, underlying assumptions and organizational defenses that thwart change, whereas in Model 2 organizations and double-loop learning is designed to challenge underlying assumptions and motivations and change behavior and develop common understanding.

Single-loop and double-loop learning can be used in the context of both individual development and organization development. “Double-loop learning is important because without it individuals are not able to reexamine their values and assumptions in order to design and implement a quality of life not constrained by the status quo” (Argyris, 1976, p. 638). Energetics as a discipline challenges the status quo. Here, one is given new knowledge, tools and frames of reference to critically reflect and reexamine their values, motivation, and underlying assumptions in order to understand the known and unknown realms, intentionally change behaviors in the form of action, and design and implement a higher quality of life.

### **Critical Reflection and Self-As Instrument**

**Critical Reflection.** The concepts of reflection, reflective inquiry, and critical reflection, particularly reflecting on behavior, are central to the theories on organizational learning, which have come to inform thinking and practice in leader development. Reflection focuses on the immediate presentation of details of a task or problem (Hoyrup, 2004). Whereas the reflective inquiry method is relevant because it stimulates dialogue and learning and “the mental models and assumptions become explicit through a reflective process of inquiry” (Keating, et al., 1996) and critical reflection includes the social context of reflection and involves the critique of presuppositions on which people’s beliefs have been built (Hoyrup, 2004). Critical reflection is perpetuated through the application of skills and concepts from the discipline of Energetics – which is in essence a reflective inquiry process of its own nature.

Mezirow (2000) described critical reflection as the process of precipitating transformation in frames of reference by surfacing and challenging uncritically assimilated assumptions about oneself and one's world. With a focus on the basic premises that underlie thinking, "people recognize that their perceptions may be flawed because they are filtered through uncritically accepted views, beliefs, attitudes, and feelings inherited from one's family, school, and society" (O'Neil, O'Grady, & Ward, 1994, p. 14). Uncritical, unreflective learning usually occurs in the earlier or primary stages of life whereas critical reflection is predominantly an adult phenomenon that cannot occur or even be discussed until this uncritical, unreflective learning has occurred (Brookfield, 2005). As one moves from infancy to adolescence, and into adulthood one experiences this uncritical, unreflective learning. In adulthood, one may pause to engage in critical reflection of self and examine one's values, assumptions, actions, as a means of nurturing self and transforming one's life. This can be accomplished through Energetics training. One may also choose to engage in this process of reflection and learning by participating in leadership programs or T-groups for example, where situations are created that may lead people to learn how to critically reflect by surfacing assumptions, subjecting them to scrutiny, and distinguishing which assumptions are valid and which are distorted (Brookfield, 2000), thus cultivating awareness of self-behavior and the use of self-as-instrument for change. In T-groups, people could gain feedback about their behavior, examine any disconfirmation of their self-image, and experiment with new behaviors in the atmosphere of psychological safety provided by laboratory education (Mirvis, 1996).

**Self, Self-as-Instrument and Self-Awareness.** In social sciences literature, there are many definitions of self, self-as-instrument and self-awareness. In fact, self and self-as-instrument are often used as interchangeable terms (Cheung-Judge, 2001; Glavas, Jules & Van



Oosten, 2006; Jamieson et al., 2010; McCormick & White, 2000; Mezirow, 2000; Smith, 1990). Jamieson, et al. (2010) described self as “ a collective portfolio of who we are, what we know, and what we can do as developed over a lifetime in both known and unknown realms” (p. 6). Their framework includes the core competencies of “seeing”, “knowing”, and “doing.” In a broader definition of self, McCormick and White (2000) have defined self as, “the emotional, perceptual, and cognitive processes that make up a person” (p. 50). Hanson (2000) has another definition, such as an “image of who one is as a person – one’s values, thoughts, feelings, perceptions, attitudes, and beliefs” (p. 100). Using the self-as-instrument perhaps then means “becoming aware of and using these emotional, perceptual, and cognitive processes” (McCormick & White, 2000, p. 50) to challenge one’s values, thoughts, feelings, perceptions, attitudes, and beliefs to further understand who one is as a person in known and unknown realms and accepting one’s power to change the image and behaviors of self. This involves being aware of one’s self precisely in the moment without judgment or analysis while thinking about one’s own thoughts and affective processes (McCormick & White, 2000).

Many people do not live in the moment and do not take time to analyze their own thoughts and affective process, thereby, failing to realize that one has greater potential in life and work than what one often chooses to acknowledge or tap into (Wilson & Wilson, 1998). Perhaps people do not always acknowledge this because taking full responsibility for their own choices in life and at work can be sometimes scary. Furthermore, perhaps people do not always take responsibility because they lack both self-awareness and the ability to turn awareness into new behaviors. As a result, people project their motives and intentions onto others, in a self-deceptive sense of being objective (Hanson, 2000). This “lack of awareness also makes it difficult to differentiate oneself (lose one’s boundaries) from others and to accept their perceptions,

thoughts, feelings and values when they are different from, or in opposition to, one's own” (Hanson, 2000, p. 99).

Self-awareness has dominated much of the scholarly work encompassing self and self-as-instrument, and has “overshadowed the importance of turning self-awareness into new behaviors and managing the use of self” (Jamieson et al., 2010, p. 8) by making more informed choices that have been arrived at independent of external pressures and influences (Hanson, 2000). The discipline of Energetics directly addresses this issue. Individuals are provided with the opportunity to explore known and unknown realms, learn a new discipline, challenge external pressures and societal norms, and accept an invitation to apply Energetics and turn ones' self-awareness into new behaviors through the management and use of self-as-instrument of change.

The role of self, self-awareness and self-as-instrument is critically important for all – OD practitioners, Energetic practitioners, spiritual leaders, leaders of organizations, and even citizenry – as the use of self involves cognitive, emotional, physical, and spiritual aspects at different moments and in different situations; which in turn impact our behavior in life and at work (Jamieson et al., 2010). Understanding and effectively managing role of self, self-awareness and self-as-instrument is profoundly necessary for leaders who wish to impart a learning culture within their organization.

### **Organizational Learning and Learning Organizations**

The notion of organizational learning emerged during the 1960s and 1970s primarily as an offshoot of managerial efforts to effectively deal with the process of organizational change (Yeo, 2005; 2008). With a legacy of embracing scientific management traditions espoused by Taylor (1911), and referred to as Taylorism, managers long viewed technological advancement as the only viable tool for organizational transformation. Yeo (2005) aptly noted that

organizations in the decades of sixties and seventies were perceived as machines that required constant upgrading and repair. A shift from the scientific traditions to human behavior approach (Fredrick, 2008; 2009) led to an unprecedented focus of the human side of organizations, and organizational learning started to get a central stage in management literature (Argyris & Schön, 1978; Argyris, 2002, Senge, 1990). The notion of organizational learning continued to evolve in a variety of directions. For Bennis (1969) and Schein (1988; 1996), for example, it morphed into the concept of organizational health while Senge (1990) reframed organizational learning as the art and practice of the learning organization. All in all, scholarly work in the field proliferated and learning became a qualifier for organizations for differentiation and competitive advantage. Associated concepts such as learning disabilities (Senge, 1990) and capacity to learn (Lipshitz, Popper, & Friedman, 2002) emerged for further analyzing organizational characteristics. Regardless of these various developments, there continues to be a very little consensus among scholars as to what constitutes organizational learning and a learning organization. Table 2 below captures the breadth of thematic and definitional foci that various theorists take in their attempt to explain the concept of organizational learning.

Table 2

*Thematic and Definitional Landscape of Learning in Organizations*

Theorists	Themes	Definitions
Argyris, C. (1993)	Theory in action	In a learning organization, individuals are the key where they are acting in order to learn, or where they are acting to produce a result. All the knowledge has to be generalized and crafted in ways in which the mind and brain can use it in order to make it actionable.
Braham, B. J. (1996)	Renewal	Organizational learning is learning about learning. The outcome will be a renewed connection between employees and their work, which will spur the organization to create a future for itself.
Denton, J. (1998)	Organizational change	Organizational learning is the ability to adapt and utilize knowledge as a source of competitive knowledge. Learning must result in a change in the organization's behavior and action

Theorists	Themes	Definitions
		patterns.
Emery, M. (1993)	Organizational structure and design	A learning organization is one that is “structured in such a way that its members can learn and continue to learn within it” (p. 2).
Garratt, B. (1995)	Action learning	A learning organization is linked to action learning processes where it releases the energy and learning of the people in the hour-to-hour, day-to-day operational cycle of business.
Marquardt, M. J., & Kearsley, G. (1999)	Technological	A learning organization has the powerful capacity to collect, store and transfer knowledge and thereby continuously transform itself for corporate success. It empowers people within and outside the company to learn as they work. A most critical component is the utilization of technology to optimize both learning and productivity.
Pedler, M., Burgoyne, J., & Boydell, T. (1991)	Growth and survival	A learning organization is like a fountain tree where the image of energy and life is characteristic of growth and survival. Organizational members are constituents of this fountain tree.
Schein, E. H. (1996)	Cultural	The key to organizational learning is helping executives and engineers (groups representing basic design elements of technology) learn how to learn, how to analyze their own cultures, and how to evolve those cultures around their strengths.
Senge, P. M. (1990)	Systems	Organizational learning involves developing people who learn to see as systems thinkers see, who develop their own personal mastery, and who learn how to surface and restructure mental models collaboratively.
Watkins, K., & Marsick, V. (1993)	Team-building	A learning organization is one that learns continuously and transforms itself where the organizational capacity for innovation and growth is constantly enhanced.
Yeo, R. K. (2005)	Organizational characteristics	A learning organization “is a collective entity which focuses on the question of ‘what’; that is, what are the characteristics of an organization such that it (represented by all members) may learn” (p. 369).
Adapted from: Yeo, R. K. (2005). Revisiting the roots of learning organization: A synthesis of the learning organization literature. <i>The Learning Organization</i> , 12(4), 368-382.		

Leveraging the foundation work done by Argyris and Schön (1978), Senge (1990) contributed to the concept of learning organization by placing this concept within interplay of five disciplines (systems thinking, personal mastery, mental models, building shared vision and

team building) that he argued were essential for a learning organization. These five disciplines are commonly used in a variety of studies focused on enhancing our understanding about organizations. Yeo (2005) maintained that there is more to organizational learning than a metaphorical conception suggesting that organizational learning is what resides in the minds of individuals within an organization. A learning organization consciously or unconsciously embraces the principles of organizational learning and fosters a thriving environment for organizational learning.

This diverse range of conceptualizations aside, one of the key challenges facing organizational scholars and managers remains the effective implementation of learning within organizations, partly because of the existence of a gap between principles and practices; and partly because of a lack of an enabling organizational culture. It must be stressed here that tomorrow's leading organizations will have to develop a culture of learning and cultivate leaning capabilities among its employees. Porter forcefully captures this message:

The companies that are going to be able to become successful, or remain successful, will be the ones that can learn fast, can assimilate this learning, and develop new insights...companies are going to have to become much more like universities than they have been in the past. Companies tended to think that they knew a lot, and therefore tried to be efficient in doing what they thought they knew. But now it's a matter of learning (Michael Porter quoted in Starkey, K., 1998, p. 532).

Implicit in the above observation is a call for needing to differentiate between knowing and learning. In essence, people within a learning organization will strive to create and re-create frameworks for decision-making wherein they question their assumptions and learn from various outcomes by coming out of their existing decision making frameworks. In such organizations, people will not reinforce what they know. They will rather explore what lies beyond their

existing realms of knowledge by learning from events and outcomes using shifting decision making frameworks and by engaging in double-loop learning.

According to Wilhelm (2006), learning organizations compete better in the marketplace because they can attract and retain the best talent and have superior brand equity. Wilhelm (2006) cited several companies, such as General Electric, Pizza Hut, Honeywell, Microsoft, Johnson & Johnson, and Apple Computer, which have been true learning organizations for years, if not decades. Their long-term success is credited to continuous learning. Some learning organizations have also created the positions of Chief Knowledge Officer or Chief Learning Officer that helped manage information flow and continuous learning (Wilhelm, 2006). Part of the responsibility of these positions is creating individual and organizational feedback loops, an essential feature of the best learning organizations (Wilhelm, 2006).

“It is very common that people act and think in ways that are not consistent with their deepest self” (Horrigan & Horrigan, 2007, p. 52) and this can lead to health problems for individuals and for organizations (Horrigan & Horrigan, 2007). People can in fact maximize their own well-being by focusing within (Cashman, 1998) and positively impact the well-being of their organization (Senge, 1990) including, “having more fun, getting better jobs, making more brilliant decisions, meeting the lover of our dreams, and making more income because of having have more energy, more insight, and more focus” (Horrigan & Horrigan, 2007, p. 49). By engaging in energy work people reveal “clearer feelings, attitudes, opinions, biases, and traumas that cause them to make decisions and act out of accord with the essence of their wholeness” (Horrigan & Horrigan, 2007, p. 52). People who engage in energy work, critical reflection, and embrace the use of self-as-instrument perhaps engage in more meaningful and productive conversations. As Barge and Oliver (2003) suggested that conversation shapes the form of

rationality, power relationships, identities, and types of emotions that are experienced by organizational members and that having the ability to manage conversation in productive ways fosters organizational learning and change. Also essential to organizational learning is the ability for an organization's members to step back and observe themselves enacting in their organization is crucial to consistently realizing double-loop learning and considering new paradigms (Keating, et al., 1996).

Often when considering new paradigms and “when attempts are made to make people conscious of their negative attributions toward others and of their defensive attributions in relationships, they all too frequently respond by becoming more defensive” (Cooperrider, et al., 2001). Through the application of skills and concepts learned from the discipline of Energetics personal defenses are broken down as people critically reflect on their own behavior, identify the underlying values and assumptions that contributed to behaviors that were out of accord with one's whole self, change their underlying values and assumptions, and change their behavior – thus, engaging in the process of double-loop learning (Argyris, 1976). To fully appreciate the impact of double-loop learning one must realize the pronounced effect of values on the change process (Amis, Slack, & Hinings, 2002) and that individuals make a conscious choice to accept that everyone and everything is connected and each individual is responsible for their own choices, thus building an appreciative context and renewed capacity to imagine and create a better future (Cooperrider, et al., 2001).

In his book the *Fifth Discipline: The Art and Practice of the Learning Organization*, Senge (1990) suggested that people who are adept at self-reflection are easier to engage in dialogue, which is foundational to a learning organization. Energetics practitioners apply skills and concepts to challenge and change personal mental models and evoke personal mastery of self

while developing new conceptions of the universe. These concepts are consistent with Senge's (1990) belief that from a learning organization stems the notion that people must be connected to each other in ways to generate new meaning and new practices and that people must converge into a systemic approach where people are continually learning, and that members of organizations must learn how to allow themselves to become part of something larger than themselves. "Learning organizations, and the people in them, learn constantly from everything they do. They use their own experience and that of others to improve performance" (Wilhelm, 2006, p. 17) and the organizational rhetoric match the organizational action (Keating, et al., 1996). Essentially, individuals in learning organizations use self-as-instrument to engage in critical reflection, apply skills and concepts from the discipline of Energetics, to learn, to grow, and change. In summary, learning organizations adopt and foster a double-loop learning process.

### **Summary**

According to Argyris (2000) "practitioners and scholars agree: twenty-first century companies will be managed differently than twentieth century firms – especially in their approaches to leadership, learning, and commitment" (p. 3). The researcher agreed with Argyris (2000), that "getting there from here, or so the consensus runs, will require change that is transformational, discontinuous, non-routine, step-function, and creative" (p. 3). What was presented through this literature review based on the four primary areas of scholarship: Energetics, double and single-loop learning, the role of critical reflection and self-as-instrument in personal and professional development, and the notion of a learning organization is a new and non-routine approach to leadership, learning and commitment. Literature was presented to support a creative approach to foster double-loop learning, transform people's behavior and way of thinking through the application of the principles of Energetics. This perhaps is a new way to



foster a generation of critically reflective people who can help build learning organizations and manage companies differently. Based on this literature review, it was proposed that application of the principles of Energetics foster double-loop learning. The next section outlined the details to methodically answer the question of how this relationship was empirically demonstrated.

## Chapter III: Methodology

### Research Design and Rationale

The researcher selected a positivistic multiple case study design to be able to focus on contemporary events. Case study approach allowed for testing the knowledge that was gained through sensory experiences and for exploring causalities and patterns among variables (Yin, 2009; McMillan, 2008).

The selection of a positivistic case study methodology requires the development and positing of a theory prior to the collection of any data (Yin, 2009). This characteristic identifies its epistemological foundation as positivistic and differentiates it from other related research methodologies within case study approaches (Yin, 2009).

The case study method is preferred when examining contemporary issues within its real-life context, when the boundaries between phenomenon and context are not clearly evident, and multiple sources of evidence are used (Yin, 1992). The question of interest, viz., how the discipline of Energetics fosters double-loop learning, was a contemporary investigation wherein respondents reflected upon a “what happens” rather than a “what happened” questions. Multiple data evidences served the purpose of data source triangulation and included course documents (handouts, learning objectives), artifacts from the Energetics Institute (published articles, information and definitions from website), and interviews with participants, and former direct observation of the Energetics Institute three-course block (2011 Energetics Institute graduate).

Table 3 below outlined the various components of the study research design.

Table 3

#### *Research Design*

Step	Definition	Corresponding element in this study
1. Identify the	Those things about	The researcher has identified five units of theory

units of the theory	which the researcher is trying to make sense and are informed by literature and experience	that the research will study (a) critical reflection, (b) identification of underlying values and assumptions, (c) changes in underlying values and assumptions, (d) changes in behavior, and (e) applied skills and concepts learned from the discipline of Energetics in units a – d.
2. Establish the laws of interaction that govern the theory	The relationship between units and how the units of the theory are linked to each other	The researcher has theoretically argued that there is a relationship between the application of skills and concepts learned from the discipline of Energetics that fosters the process of double-loop learning.
3. Determine the boundaries of the theory	The real-world limits of the theory that distinguish the theoretical domain of the theory from those aspects of the real world not explained by the theory	The boundaries of this theory are Energetics Institute graduates who have successfully completed or mastered all three levels of coursework with an A grade.
4. Specify the system states of the theory	The condition (s) under which the theory is operative	The theory applied to participants who engaged in coursework through the Energetics Institute, who successfully completed all three levels of the Energetics Institute, and who self-identified as having a change in values and underlying assumptions.
5. Specify the propositions of the theory	A logical consequence or outcome of a model when the model is fully specified in its units, laws of interaction, boundary, and system states	The proposition for this research that is concerned with “the ways in which a theoretical model are put to use” (Dubin, 1978, p. 159) is that when an individual reflects critically on their own behavior, identify and acknowledge the ways they contribute to their own problems, change the way the act, and apply the principles of Energetics, then double-loop learning has occurred.
6. Identify empirical indicators of the theory	An operation employed to secure measurements of values of a unit	Table D <i>Interview Protocol</i>
7. Develop the propositions to test the theory	The establishment of a linkage between the theoretical framework and the real world that results from translating some of the propositions of the theory	The researcher used inductive logic to generate insights into how the research question of this study unfolds.
8. Test the	Dependent on the	An assumption of the researcher is that the

theory through a developed plan of research	researcher's research stance (i.e., theory refinement versus theory verification).	empirical indicators employed in testing the theory have a reasonable level of reliability. Therefore, the researcher's stance involves proving the adequacy of the theoretical framework.
<i>Note.</i> Columns 1 and 2 adapted from Lynham, S. A. (2002). Quantitative research and theory building: Dubin's method. <i>Advances in Developing Human Resources</i> , 4(3), 242-276 and Dubin, R. (1978). <i>Theory building</i> (Revised ed.). New York: The Free Press.		

### **Participant Selection Criteria**

The eligibility criteria for case selection included: the participants must have been graduates from the Energetics Institute; the participants must have successfully completed all three Energetics courses sequentially, and with success defined as achieving an A grade in each course. Following Yin (2009), who suggested two case selection criteria – namely, sufficient access to the potential data sources and richness of information of cases, the researcher adopted a convenience sampling approach. Potential participants' willingness to participate in study and their readiness to be available when needed guided final case selection criteria (Fink, 2009). Overall, the researcher selected 16 participants, and each was a case. Each individual case study consisted of a whole study, in which convergent evidence was sought regarding the propositions for the case (Yin, 2009).

The individuals identified as potential research participants, received electronic mail as an introduction that outlined the purpose of the research study, the background of the researcher, University affiliation, addressed confidentiality, and provided the individuals with the researchers contact information (Appendix A). The researcher expected approximately fifteen individuals who met the criterion to volunteer for participation in the study. For non-respondent the researcher transmitted a follow-up email to inquire about interest and to request their participation in the study. Finally, 16 eligible graduates were interviewed.

## Theory Development

The researcher's firsthand experience of the three-course block (Table 4) provided the basic tenet for positing the theory for this research.

Table 4

### *Energetics Coursework*

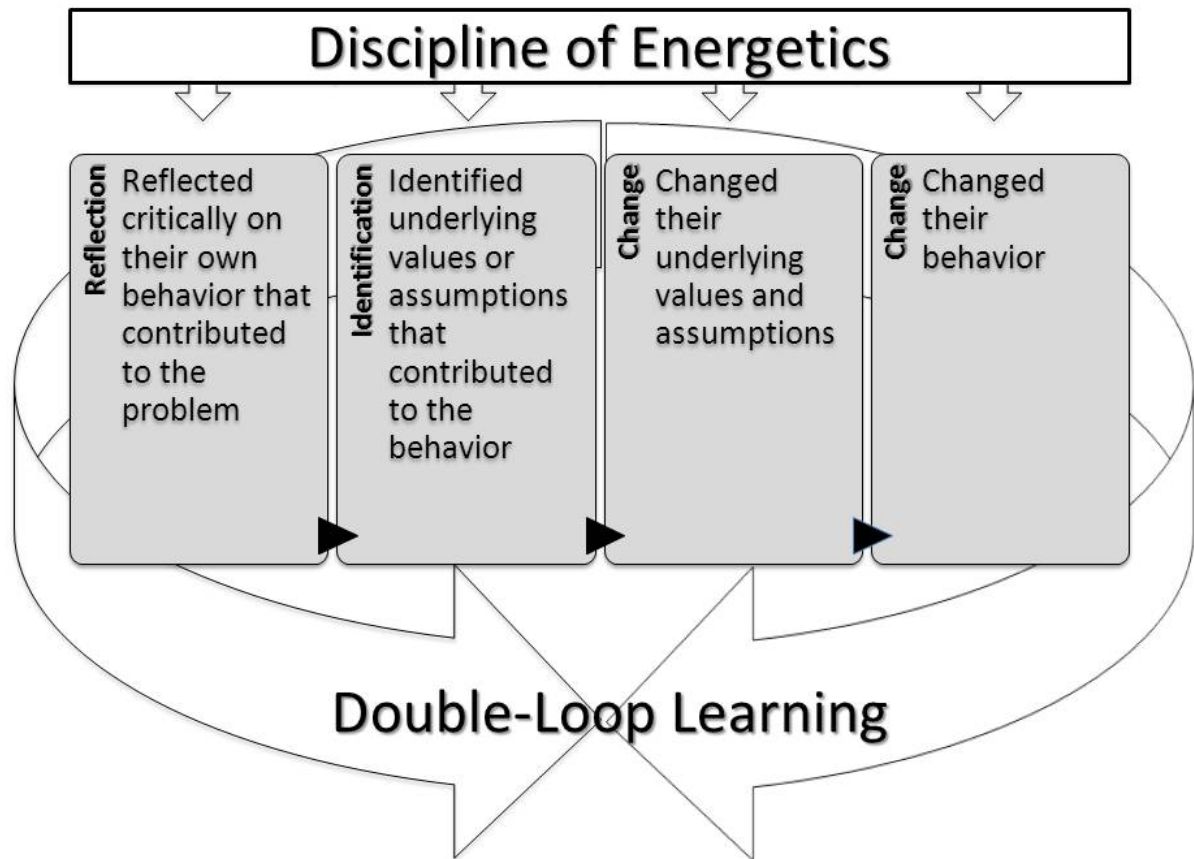
Level One: Introduction to Energetics	Self as Instrument provides a foundation of the theory and practice of energetics. During this class, student-practitioners engage in an intensive time of learning, growth, and transformation where they learn how to manage their own energy, practice energetic tools, reflect on developing skills, and apply energetic principles in a variety of situations.
Level Two: Work with Groups and Individuals	Builds upon Level One and expands scholar-practitioners' learning by introducing advanced energetic concepts and techniques which can be applicable in the professional environment. The focus of this level is managing energy of individuals and groups. The Level Two courses are geared toward professionals looking to further develop energetic skills and integrate practices into their careers, consulting, businesses, and organizations.
Level Three: Work with Organization	Continues to build on the learnings from Level One and Level Two as students refine their skills through integrative practice and continued experiential learning, as well as learning how to deal with bigger clusters of energy. This course is beneficial to OD consultants or any practitioners who work with large groups of people and organizations.
Source: <a href="http://energeticsinstitute.org/joomla/our-work/classes">http://energeticsinstitute.org/joomla/our-work/classes</a>	

The instructor skillfully helped participants critically reflect on their own governing values, beliefs and the subtle patterns of reasoning underlying their own behavior. With practice, the researcher became much more aware of her own assumptions and mental models, and their impact on her decisions to act became much more explicit to her through critical reflection and reflective inquiry. Through critical reflection and reflective inquiry the researcher held up a metaphorical mirror to see through her own reflections of behavior in life and at work while seriously contemplating about her own behaviors, problems, undiscussables, and personal

defenses. All this led to the researcher being able to recognize and analyze her own thoughts and actions, which was ultimately useful for her in making appropriate changes in her day-to-day business. The ability to self-reflect and to understand one's impact on daily business at work is critical to the role of OD practitioner (OD Network, 2012). As such, the researcher's first-hand engagement with the series of Energetics classes– Self-as-instrument, work with groups and individuals, and work with organizations – and the profound changes it brought about in her behavior motivated her to empirically examine the effect of the application of the principles and skills of Energetics on double-loop learning. This first-hand engagement and subsequent reflection also helped her in positing a five-component theoretical model for this study consisting of reflection, identification, changes in values, changes in action/behavior, and double-loop learning. While the researcher posited a new theory; “the ways in which an individual's values affect behavior has long been a focus of study across the social sciences” (Amis, et al., 2002).

### **Theory Description**

The researcher posited the following theory in this positivistic multiple case study: The discipline of Energetics provides a framework (Figure 2) for double-loop learning. The framework includes (a) an opportunity for individuals to reflect critically on their own behavior that contributed to the problem, (b) an opportunity for individuals to identify underlying values or assumptions that contributed to the behavior, (c) an opportunity for individuals to change their underlying values and assumptions, (d) an opportunity for individuals to change their behavior, and (e) an opportunity for individuals to apply skills and concepts learned from the discipline of Energetics during units a – d in order to complete the occurrence of double-loop learning.



*Figure 2.* How the discipline of Energetics fosters double-loop learning.

Overall, the researcher adopted Dubin's (1978) eight-step model for theory building and Yin (2009) case study research design components as the framework of theory development as outlined in this section and Table 3.

### **Units of Analysis**

According to Lynham (2002), the researcher should identify the units or concepts of theory that "represent the things about which the research is trying to make sense and that are informed by literature and experience" (p. 247). Therefore, the researcher identified five units of theory to study: (a) critical reflection – participants reflected critically on their own behavior that contributed to the problem, (b) problem identification and deciphering – participants identified underlying values or assumptions that contributed to the behavior (c) self-as-instrument of

change – participants changed their underlying values and assumptions, (d) change – participants changed their behavior, and (e) applied skills and concepts learned from the discipline of Energetics within units a – d.

### **Laws of Interaction**

This step describes the relationship between the theory and the units of analysis. The researcher believed that there is a relationship between the application of skills and concepts learned from the discipline of Energetics and the process of double-loop learning.

### **Boundaries**

The boundaries were defined as the sphere of influence in which the theory is applicable. The boundaries of this theory were Energetics Institute graduates who have successfully completed or mastered all three levels of coursework with an A grade. The purpose of this criterion was that double-loop learning may have been disrupted or may not have occurred without higher-level mastery of the discipline. Testing this theory on individuals who have not successfully completed the Energetics Institute, or who have a mental illness for example, would not have been appropriate for this study, nor would it be for replicative studies.

### **System States**

According to Lynham (2002), “a system state is a condition of the system being modeled in which the units of the theory interact differently” (p. 256). This identified the conditions in which the theory was expected to operate in the real world and under what conditions the units of the theory would be inclusive, persistent and distinctive (Dubin, 1978). For this research, the theory was applied to participants who had taken the coursework through the Energetics Institute, who had successfully completed all three levels of the Energetics Institute with a letter



grade of A, and who had self-identified themselves as having experienced changes in their values and underlying assumptions.

### **Propositions**

Upon the completion of the three-course block, Energetics Institute graduates learned such practices as; detecting and working with subtle energies, enhancing self-skills of working with unhealthy patterns of energy exchange within self and between and within groups, and used Energetics to deepen understanding of “self-as-instrument”, a core OD concept, which is essential to being a reflective practitioner. Furthermore, graduates had the opportunity to apply Energetics concepts to self, groups, organizations, and to problems in life and at work. Graduates used critical reflection and deciphering techniques to understand the way in which their values, assumptions, and behavior contributed to their own problems and then made a conscious decision to choose or not to choose to change the way they act. Many Energetics Institute graduates had informally stated that they underwent a transformative process attending the Energetics Institute citing a change in values, assumptions and their conception of their role in the universe. These claims corroborated the researcher’s own experience gained through the engagement in the same training. As previously discussed, this transformative experience forms the process of double-loop learning in action and involves participants’ reframing their problems and learning to see things in totally new ways (Romme & Van Witteloostuijn, 1999). Previously stated claims of other graduates and researcher’s personal transformation, experience of double-loop learning, and positive association with the Energetics Institute led to the development of the posited theory and the propositions of the study.

According to Dubin (1978), the specification of the propositions constructed logically and intellectually by the researcher are truth statements about the theory and are concerned with

the ways in which a theoretical model are put to use. The proposition for this research is that when an (a) an individual reflects critically on their own behavior that contributed to the problem, (b) identifies and acknowledges the underlying values and assumptions that contributed to the behavior, (c) changed their underlying values and assumptions, (d) changed their behavior (e) and applied skills and concepts learned from the discipline of Energetics, then double-loop learning has taken place.

### **Data Collection Methods and Interview Protocol**

The data for this study were gathered from interviews with individual graduates of the Energetics Institute. The researcher conducted a semi-structured interview, audio taped them, and determined through data analysis if the responses supported or refuted the posited theory. The researcher used Likert-Scale questions that directly related to the research study propositions followed by a structured probe including a request for participants to provide a story or example to illuminate their response to the Likert-Scale question. The protocol was highly structured in terms of wording of the questions and each question directly related to a proposition of the posited theory. Participants were asked identical Likert-Scale questions, but the probe for a story or example remained open-ended (Gall, Gall, & Borg, 2003). By asking a Likert-Scale question and then providing an open-ended framework for examples and stories, participants were able to provide as much detailed information as they desired, fully expressing their viewpoints and experiences, and adding depth to the case study as it related directly to the theory. Prior to data collection, the interview questions were pre-tested on a colleague who had completed the three-course block of Energetics. Feedback was used to improve clarity of questions. Minor changes were made. This participant was not included in the final set of respondents.

Upon receiving participants' informed consent, the researcher scheduled interviews, which were completed in June and July 2012. Interviews were conducted either in person or over Skype or by using telephone or email when geographic constraints and convenience for the participants inhibited an in-person interview. Each interview was scheduled for approximately one hour. Prior to the start of each interview, the researcher read a standard introduction and disclosure to the participant that ensured full understanding of the scope and risks associated with the research being conducted and also sought permission for audio recording the interview (Appendix B).

Once the participants verbally acknowledged their understanding of the risks and gave consent, the researcher began the interview following the interview protocol outlined in Table 4. In the protocol, there were open ended and Likert-Scale questions from 1 to 5 scale, where 1 is low and 5 is high was used (outlined in Table 5).

The interview questions followed the framework for the posited theory which included the following units of the theory: (a) an opportunity for individuals to reflect critically on their own behavior that contributed to the problem, (b) an opportunity for individuals to identify underlying values or assumptions that contributed to the behavior, (c) an opportunity for individuals to reflect upon the changes in their underlying values and assumptions, (d) an opportunity for individuals to reflect upon the changes in their behavior, and (e) an opportunity for individuals to reflect upon the applicable skills and concepts learned from the discipline of Energetics during units a – d in order to complete the occurrence of double-loop learning.

Table 5

*Interview Protocol*

Units of Analysis	Empirical Indicator	Source of Data
-------------------	---------------------	----------------

Unit #1. Ability to reflect critically on their own behavior that contributed to the problem.	Unit #1a and Unit #1b. Ability to reflect critically on own behavior.	<i>“Please describe how you reflect critically on your own behavior when you face a problem at work.”</i>	Open-ended question.
	Unit #1a. Reflective ability before Energetics.	<i>“I was able to reflect critically on my behavior before completing the Energetics courses.”</i>	Likert scale question.
	Unit #1b. Reflective ability after Energetics.	<i>“I was able to reflect critically on my behavior after completing the Energetics courses.”</i>	Likert scale question.
	Unit #1a and Unit#1b. Indication of Support	A 25% or greater increase between Unit #1a and Unit #1b indicated support of this unit of analysis. Open-ended question provided descriptive evidence of support or no support.	Likert scale question and open-ended question.
Unit #2. Ability to identify underlying values or assumptions that contributed to the behavior.	Unit #2a and Unit #2b. Ability to identify underlying values or assumptions that contributed to the problem.	<i>“Thinking about how you solve problems at work, please describe your ability to identify your values and assumptions that led to your behavior.” Probe: “how did taking Energetics change our ability to identify your values and assumptions?”</i>	Open-ended question and probe.
	Unit #2a. Identification ability before Energetics.	<i>“Before taking Energetics, during workplace problem solving, I was able to identify the values and assumptions that led to my behavior.”</i>	Likert scale question.
	Unit #2b. Identification ability after Energetics.	<i>“After taking Energetics, during workplace problem solving, I am able to identify the values and assumptions that led to my behavior.”</i>	Likert scale question.
	Unit #2a and Unit #2b. Indication of Support	A 25% or greater increase between Unit #2a and Unit #2b indicated support of this unit of analysis. Open-ended question and probe provided descriptive evidence of support or no support.	Likert scale question, open-ended question and probe.
Unit #3. Ability to change their underlying values and assumptions.	Unit #3a and Unit #3b. Ability to change underlying values and assumptions.	<i>“Please describe how during workplace problem solving you are able to change your values or assumptions if you discovered that these led to behaviors that were part of what created the problem.” Probe: “how did taking Energetics change your values and assumptions?”</i>	Open-ended question and probe.
	Unit #3a. Ability to change values and assumptions before Energetics.	<i>“Before taking Energetics, during workplace problem solving, I was able to change the values and assumptions that led to my behavior.”</i>	Likert scale question.
	Unit #3b. Ability to change values and assumptions after Energetics.	<i>“After taking Energetics, during workplace problem solving, I was able to change the values and assumptions that led to my behavior.”</i>	Likert scale question.

	Unit #3a and Unit #3b. Indication of Support	A 25% or greater increase between Unit #3a and Unit #3b indicated support of this unit of analysis. Open-ended question and probe provided descriptive evidence of support or no support.	Likert scale question, open-ended question and probe.
Unit #4. Ability to change their behavior.	Unit #4a and Unit #4b. Ability to change their behavior.	<i>“Please describe how during workplace problem solving you were able to change your behaviors after you discovered that these were part of what created the problem.” Probe: “how did taking Energetics change your ability to change your behaviors?”</i>	Open-ended question and probe.
	Unit #4a. Ability to change behavior before Energetics.	<i>“Before taking Energetics, during workplace problem solving, I was able to change my behaviors that contributed to the problem.”</i>	Likert scale question.
	Unit #4b. Ability to change behavior after Energetics.	<i>“After taking Energetics, during workplace problem solving, I was able to change my behaviors that contributed to the problem.”</i>	Likert scale question.
	Unit #4a and Unit #4b. Indication of Support	A 25% or greater increase between Unit #4a and Unit #4b indicated support of this unit of analysis. Open-ended question and probe provided descriptive evidence of support or no support.	Likert scale question, open-ended question and probe.

The researcher used Likert scale questions to collect quantitative data from the participants, which was used to determine support of the theory that the discipline of Energetics fosters double-loop learning. The units were tallied and determined to support or not support the posited theory for each Participant. To demonstrate support of the theory by Participant, a 25% or higher increase in units 1-4 needed to be indicated for each Participant. To support, partially support, or not support the posited theory in cross-case analysis. The researcher determined that if between 75% and 100% of the participants (between 12 and 16 total participants) indicated “yes” with an associated 25% or higher increase in all four-unit categories, the posited theory is supported. The determined criteria for partial support was: between 45% to 74% of the participants (between 7 and 11 total participants) indicated “yes” with an associated 25% or higher increase in all four unit categories. No support was determined if fewer than 44% of the

participants (6 or fewer participants) indicated “yes” with an associated 25% or higher increase in all four unit categories. The researcher used open-ended probe questions to capture stories, examples, and descriptive evidence as qualitative data to add richness to the case studies and indicate support or no support from the participants. These probes also served the purpose of a method triangulation.

### **Ethics and Procedures for the Protection of Human Subjects**

The researcher took several steps to protect the confidentiality and identification of the research participants. Following standard University protocol, the researcher first applied for approval from the Institutional Review Board (IRB) prior to conducting research to ensure that the welfare and rights of the participants were protected and to also ensure that the proposed research and its process was both appropriate and in compliance with the prescribed requirements by the IRB of the University of St. Thomas.

Participants were emailed a consent form prior to the interview and asked to mail it back to the researcher prior to the interview (Appendix B). The consent form included an overview of the research, explanation of survey and interview procedures, assurance of confidentiality, statement that participants will not be remunerated for their involvement in the study, assurances as to the voluntary nature of the study, identification of, if any, risks and benefits of the study, and researcher contact information.

To assure confidentiality, participants were explicitly notified that the research findings and their publication in any form would not disclose participants’ identities. Participants were also asked to grant permission to audio record their interviews, which was helpful for the researcher to precisely document particularly informative and useful quotations. Nonetheless, consent for audio recording was a voluntary choice. In compliance with the IRB guidelines, all

taped material will be erased and destroyed upon successful completion of the study and acceptance of the dissertation.

The researcher took handwritten notes during the survey and formal interviews and secured those surveys, notes, and tapes in locked file cabinets to which only the researcher had access. The tapes were kept in a separate locked cabinet from the handwritten notes. For the sake of anonymity, participants were identified solely with an ID number throughout the data analysis.

The list linking the participant to an ID number was kept in a password protected computer file on the researcher's password protected personal laptop which only the researcher has access to.

### **Data Analysis and Criteria for Interpreting Findings**

The propositions shaped the data collection plan, empirical indicators, and provided a theoretical orientation guiding the case study analysis (Yin, 2009). Accordingly, the researcher relied on the empirical indicators and studied propositions that led to this case study.

First of all, the scores of the Likert-Scale questions were fed into a Microsoft Excel spread sheet. Since the total number of respondents in this study was low, Likert-Scale question scores were used for descriptive data analysis (e.g., average, range etc.) and also for finding preliminary patterns among variables as posited in this study. Data from open-ended questions further uncovered these patterns. Open-ended questions were designed to elicit in-depth responses to all five units of analysis and their interconnectedness. The researcher wrote inferences for each interview. Although, the data inference was generally straightforward, a workplace colleague was recruited to separately write his inferences for the same transcripts. The colleague's inferences were found to be similar to the researchers, which helped triangulate the findings and lend credibility to the results of the study.

## **Quality Control**

Quality concerns are paramount for enhancing the credibility of case study research (Yin (2009)). In case study research, construct validity is the extent to which a measure used in a case study correctly operationalizes the concepts being studied (Gall, et al., 2007). To meet the test of construct validity, the researcher used multiple sources of evidence (source triangulation) including interview transcripts, course documents, audiotapes, and other artifacts. To ensure reliability issues, the researcher: (a) maintained a case database, and (b) adhered to a case study protocol that other researchers could use to arrive at similar results.

## **Summary**

The researcher embarked on a journey to develop a theory to help leaders, scholars, and practitioners foster a generation of critically reflective people who can help build learning organizations, which is a key imperative facing modern business. The theory was developed over time as the researcher was exposed to the discipline of Energetics through interaction with the Energetics Institute founder, exchanges with Energetics Institute graduates, the researchers completion of the three-course block, and through further research on Energetics, learning organizations, single and double-loop learning, critical reflection and self-as instrument of change.

Upon development of the theory a positivistic multiple case study was selected. The selection of research study participants as Energetics Institute graduates who successfully completed all three Energetics courses with an A grade was then a natural determination. The researcher was interested in the relationship between the application of skills and concepts learned from the discipline of Energetics and the process of double-loop learning so she developed a semi-structured interview with both Likert-Scale and open-ended questions with a



structured probe to illuminate participant responses and gain data to determine if there was indeed a relationship that existed. The researcher also took several steps to protect the identification and confidentiality of the research participants and strictly adhered to the IRB process.

## **Chapter IV: Findings**

This chapter is organized as follows. First, the researcher introduces the data analysis mechanism used in this work. It is followed by an outline of participants' profile. Then a case-by-case analysis is presented. Further, a cross case unit analysis is presented. Finally, the researcher presents a summary of the findings from both case-by-case and cross case analyses.

The case-by-case analysis reviewed Likert-scale responses regarding how the discipline of Energetics fosters double-loop learning, detailing quantitative responses to each of the four units of analysis followed by an analysis of open-ended questions. The cross case unit analysis examined the aggregated scores for each of the four units of analysis. The four units included the ability to: reflect critically on own behavior that contributed to the problem (Unit #1); identify underlying values or assumptions that contributed to the behavior (Unit #2); changed their underlying values and assumptions (Unit #3); and changed their behavior (Unit #4).

The researcher used Likert scale questions to collect quantitative data from the participants. An increase of at least twenty five percent (25%) or greater between Unit (a) and Unit (b) was assumed to provide support for individual units. The researcher used open-ended and probe questions to capture stories, examples, and descriptive evidence as qualitative data to add richness to the case studies and indicate support or no support from the participants.

### **Participant Profile**

Prospective participants were graduates of the Energetics Institute who achieved an A grade in Energetics coursework. After identifying prospective participants, the researcher approached these graduates and asked him or her to participate in the study. Thirteen female and three male participants volunteered to participate in the study. Participants were between the ages of 35 and 65 at the time of the interview. All participants self-identified as having completed a

baccalaureate level degree. One of the male participants held a masters level degree while two of the male participants held doctoral level degrees. Three of the female participants held a masters level degree while eight of the female participants held doctoral level degrees. Participants described their employment status as employed, working 35 or more hours per week. All participants held professional work positions identified as management, business and financial, education and training, legal, healthcare support, office and administration, and community and social services occupations. Participants self-identified as mid-career to late-career professionals with none having self-identified as entry-level or early career professionals. Several of the participants were direct supervisors of others.

### **Participants' Case-by-Case Responses**

This section contains 16 cases representing the 16 different participants in the study. At occasions, some words were removed from participants' quotes primarily to protect participants' identity but at a few instances also to enhance the readability. However, the essence and the meaning of the quotes, stories and examples were not altered in any manner.

**Case 1.** Participant 1 was a mid-career male professional who held a masters level degree and had supervisory and management responsibilities. He stressed during the interview the desire to find *common ground* with his colleagues and subordinates at work. The following sub-sections outlined his unit-wide responses.

***Unit #1 – critical reflection of self-behavior.*** Participant 1 expressed the need for critical reflection in relation to his behavior and how this behavior contributed to the problem at work, understand his approach to the problem, view the problem through the lens of the other party, and identify an approach to resolve or manage the problem. It can be observed from what he stated:

*Often times critical reflection is not at the moment it happens. I reflect after the fact and I definitely loop back with the other person. During reflection I think about the problem I am trying to solve, how I am coming at it, how the other person is coming at it; what common ground we have; what does the person want from me; and what do I want from that person. After reflection, I may elect to email the person I had the problem with to share some initial thoughts and ask if we can meet and discuss the situation further.*

**Unit #2 – identification of values or assumptions underlying the behavior.** Participant 1 stressed how the Energetics training helped him identify and acknowledge underlying values and assumptions that may have contributed to his behavior. As a result, this participant clearly acknowledged his being able to re-adjust his assumptions and approach individuals without any preconceived notions. The following quote aptly reflects this:

*A lot of my underlying assumptions and values come from past experiences that have shaped my current assumptions and values. For example, I may have created different assumptions about different people based on my past experiences. {But now} I re-adjust my assumptions based on whom I am working with.*

**Unit #3 – changes in underlying values and assumptions.** Participant 1 further stated that he became open to identify and change his underlying values and assumptions. This participant clearly indicated that he was open to re-evaluate his own position even when he was convinced that he was not creating problems:

*Even if I do not think I am throwing up a roadblock or adding to the problem and someone else saw that I threw up a roadblock or added to the problem, and they are able to articulate to me and say; here is what you are doing; here is what your behavior is*

*causing; here is how we are perceiving it... Then this conversation and reflection process often helps me change my underlying assumptions.*

By reflecting on how he interacted with others involved in the problem, reflecting on the problem itself, his role in the problem, and the other person's role in the problem while applying the discipline of Energetics the participant changed his underlying values and assumptions, changed the way he interacted with others and engaged in workplace problem solving. He stated:

*When I am a part of a problem I reflect on what really happened; how it happened; and did that person metaphorically try and push me down just so they could feel better about themselves. All this may contribute to a change in my values, assumptions and how I interact with others.*

**Unit #4 – change in the behavior.** Participant 1 reported that after receiving Energetics training, he was able to make behavioral modifications. Although the participant did not provide any specific example he stated:

*I try and change my behavior once I recognize it has contributed to a problem or someone calls my attention to it. I am then able to reframe the conversation we are having and it helps get us to a better place much quicker.*

Further the participant clarified that gathering new information helped him develop new perspective, engage in deeper conversations, which in turn, led to behavioral modification:

*After gathering new information I was able frame what I wanted, and did not want to say and we were able to have a richer conversation...(this led to) to change my behavior.*

Likert-scale data suggested that Unit #1, Unit #2, Unit #3, and Unit #4 were supported (Table 6). While the changes were substantially higher in other Units, the participant indicated a

high level of reflective ability prior to Energetics therefore resulting in a 25% increase after taking Energetics.

Table 6

*Participant 1 Unit of Analysis Responses*

Units	Unit #1a. Reflective ability before Energetics.	Unit #1b. Reflective ability after Energetics.	Unit #2a. Identification ability before Energetics.	Unit #2b. Identification ability after Energetics.	Unit #3a. Ability to change values and assumptions before Energetics.	Unit #3b. Ability to change values and assumptions after Energetics.	Unit #4a. Ability to change behavior before Energetics.	Unit #4b. Ability to change behavior after Energetics.
Reported score	4	5	2	5	2	4	2	5
Percentage Change between Units a and Units b	25% Increase		150% Increase		100% Increase		150% Increase	

**Case 2.** Participant 2 was a female professional who self-identified as introverted by Meyers-Briggs Type Indicator standards. Through her doctoral program she developed a growing curiosity to learn about herself and change the behaviors that were not benefiting her personally or professionally. Participant 2 held a professional management occupation with responsibilities for facilitation and training as related to program development and problem solving. The following sub-section outlined her unit-wide responses.

***Unit #1 – critical reflection of self-behaviors.*** After taking Energetics the participant became more consistent and purposeful in her critical reflection. She also reflected purposefully on both the short and long-term impact of her behavior as stated in her quote:

*Now I usually reflect on the problem at work and the short-term and long-term impact of my behavior. I am not as consistent at doing that but I have tried to be more purposeful in thinking through not just the short term, but of the impact of my behavior on the long-term.*

**Unit #2 – identification of values or assumptions underlying the behavior.** After taking Energetics, the participant reported to have become more skilled at identifying and acknowledging the values and assumptions underlying her behavior. She succinctly stated:

*Identifying my values and assumptions has been easier since taking Energetics.*

On further probing, this participant noted that she had become more self-aware, aware of others and her environment:

*After completing the Energetics courses, I am more in tune to energy of situations and my emotions, not just what is happening in my head. I am more in tune with what I contribute to a project, problem, and what happens in work settings because I can attend to whatever is required in more than just an intellectual way.*

**Unit #3 – changes in underlying values and assumptions.** This participant noted that taking Energetics helped her significantly change her underlying values and assumptions. She stated it explicitly and also outlined some of the ways how this change happened:

*Energetics changed my values and assumptions in a pretty big way! At a pretty core level I would say. The discipline of Energetics took me to a much deeper understanding of my own self, my values and my assumptions. Energetics took me to a place of deeper self-awareness, self-confidence, and recognition of how I can positively impact a situation by changing my values and assumptions. In the past, I was in victim mode and did not see my contribution to an issue or problem. As a result of Energetics my sense of victimhood has greatly reduced and now I have an increased sense of accountability for my behavior, thoughts and feelings.*

**Unit #4 – change in the behavior.** This participant also noted that Energetics helped her better assess the environment, how people were engaging, and accordingly adjust her behavior.

She stated:

*In the past it was disconcerting for me to change my behavior if something was not working. After Energetics, it is much easier and more comfortable for me to change my behavior based on how I read the energy in the room and from the people I am working with.*

She also believed that Energetics helped her become more cognizant of the needs of a group and sensitive to how others received her approach to a situation, and in turn, attuned her behavior. She stated:

*Now I have a greater awareness of what is going on in a room. It could be something as simple as recognizing the need for the group to take a break or something more complex like stepping back and acknowledging if an approach is not working. There are several times in the last year where I have had to acknowledge that my approach was not working. Previously, that would have been very hard for me and now I try and trust the energy of the situation, change my behavior, and go with that flow.*

Likert data suggested that Unit #1, Unit #2, Unit #3, and Unit #4 were supported (Table 7). The changes were substantially high in Unit #1 and Unit #4 as indicated by a 150% increase. Participant 2 indicated a 100% increase Unit #2 and Unit #3. Data indicated the participant engaged in the process of double-loop learning as alluded to by the participant in this quote: *As a result of Energetics my sense of victimhood has greatly reduced and now I have an increased sense of accountability for my behavior, thoughts and feelings.*

Table 7



*Participant 2 Unit of Analysis Responses*

Units	Unit #1a. Reflective ability before Energetics.	Unit #1b. Reflective ability after Energetics.	Unit #2a. Identification ability before Energetics.	Unit #2b. Identification ability after Energetics.	Unit #3a. Ability to change values and assumptions before Energetics.	Unit #3b. Ability to change values and assumptions after Energetics.	Unit #4a. Ability to change behavior before Energetics.	Unit #4b. Ability to change behavior after Energetics.
Reported score	2	5	2	4	2	4	2	5
Percentage Change between Units a and Units b	150% Increase		100% Increase		100% Increase		150% Increase	

**Case 3.** Participant 3 was a female mid-career professional in community and social services occupation. At the time of the interview this participant held a masters level degree and was taking courses in a doctoral degree program. She shared that during the first half of her Energetics course work she thought Energetics was *malarkey* and that she *most definitely did not need to change her behavior* therefore she *resisted the discipline as long as she could* until *something clicked* and things in her life *began to change*. The following sub-sections outlined her unit-wide responses.

**Unit #1 – critical reflection of self-behavior.** On critical reflection, this participant gave a thoughtful answer, although she did not explain much. She stated:

*I determine why the situation is presenting itself to me; what I can learn from it; I try to accept it; and I seek a resolution by means of changing self.*

**Unit #2 – identification of values or assumptions underlying the behavior.** This participant acknowledged that critical reflection helped her identify and acknowledge her underlying values and assumptions. This was observed through her statement:

*Through critical self-reflection I identify my values and assumptions and figure out what is at the root—which are my values and assumptions—of the situation that is important to me.*

Taking Energetics helped the participant remove walls she had self-constructed for protection of self. She learned how to identify the values and assumptions that impacted her behavior and she became more trusting of self, perceptive and self-aware. As a result of Energetics training, she acknowledged that her underlying values, assumptions, fears and culture impacted her behavior, leadership ability, communication, and response to workplace problem solving. The participant clarified the identification process in her quote:

*Energetics completely changed my ability to identify my values and assumptions because it cleared the air of barriers that I put up to protect myself. I trust myself more and I seek self-knowledge instead of righteousness. For me it is everything in my ability to know self. I was not very perceptive before the Energetics courses and I used to dismiss feelings as unimportant. I would not have bothered to think about the bigger picture and I would have been more self-righteous. How I feel, behave, and reflect on those feelings and behaviors uncovers my values, assumptions, fears, and my culture. It is important for me and for the organization I work for that I identify and understand my energy, feelings, values, assumptions, fears and culture because it ultimately impacts my behavior, how I communicate, my ability to lead, and my response to problems.*

**Unit #3 – changes in underlying values and assumptions.** After Energetics training, the participant reduced her personal bias and judgment through critical reflection, change in her values and assumptions, increase in openness to others preferences, and finally change in her behavior. She stated:

*Now I understand my way is not the only way, but rather it is my preference. This change has prevented me from jumping to judgment and helps me evaluate and decipher why I*

*may have a bias or judgment. I am more relaxed in what I think about people and more reflective on why I care.*

**Unit #4 – change in the behavior.** Through the Energetics coursework the participant was able to change her underlying values and assumptions. She also made changes in her attitude, which is a component of her behavior, this can be observed from her statement:

*I am able to change my behavior by changing my underlying values and assumptions, my attitude, and changing my vibrational reactions to people and situations... Energetics gave me the control and skill set to change my behavior... ”*

Likert data suggested that Unit #1, Unit #2, Unit #3, and Unit #4 were supported (Table 8). While the changes were higher in other Units, the participant indicated only a 33% increase in her ability to change her behavior after taking Energetics. The participant rated her ability to change her behavior before Energetics as 3 (neutral) and 4 (agree) after Energetics. She shared this thought with the researcher: *Long-term behavior change is hard.* She also indicated that she *catches herself casting judgment* on others at times. This is behavior she has focused on changing.

Table 8

*Participant 3 Unit of Analysis Responses*

Units	Unit #1a. Reflective ability before Energetics.	Unit #1b. Reflective ability after Energetics.	Unit #2a. Identification ability before Energetics.	Unit #2b. Identification ability after Energetics.	Unit #3a. Ability to change values and assumptions before Energetics.	Unit #3b. Ability to change values and assumptions after Energetics.	Unit #4a. Ability to change behavior before Energetics.	Unit #4b. Ability to change behavior after Energetics.
Reported score	3	5	3	5	2	4	3	4
Percentage Change between Units a and Units b	66% Increase		66% Increase		100% Increase		33% Increase	

**Case 4.** Participant 4 was a male mid-career professional and recent masters degree program graduate who worked in a leadership role in health care support occupations. Participant 4 shared with the researcher that since graduating from the Energetics Institute *he had been really focused on developing deeper level self-awareness for both personal and professional development.* Participant 4 shared that he had been *increasingly patient at work and more mindful about his behavior* post Energetics. The following sub-sections outlined his unit-wide responses.

**Unit #1 – critical reflection of self-behaviors.** After taking Energetics the participant was more mindful. One might suggest that mindfulness requires critical reflection of self-behaviors. The participant alluded to critical reflection through mindfulness in his quote:

*After Energetics, I have been very mindful of my behavior. It has been such a focus point for my personal development at work. I was not as mindful in the past as I am now.*

**Unit #2 – identification of values or assumptions underlying the behavior.** This participant identified his underlying assumptions in his interactions with others:

*Now I modify my approach depending on the person. I generally go on past experience and what the situation is and I try to get to what (the other person) is really asking about...”*

Taking Energetics helped this participant become a more effective leader by learning to identify the intentions and motives that were consequence of his assumptions. He stated:

*I have become much more aware of my intentions and motives that are driven by my values and assumptions. I am much more in tune with my values, assumptions, intentions, and motives than in the past and this has made me a much more effective leader.*

**Unit #3 – changes in underlying values and assumptions.** After Energetics, the participant changed his underlying values and assumptions and became more sensitive to the emotion of self and others. He also became as a result of changing his underlying values and assumption through the Energetics training. In his quote, he shared the importance of Energetics and emotional connectedness:

*I now have a better sense of what my motives and values and assumptions are and have moved from analytical thinking and responses to emotion-based. I would not have made the connection of how important my emotional and Energetic responses are without the Energetics courses.*

Taking Energetics helped the participant become more mindful of his underlying values and assumptions change his underlying values and assumptions, change his behavior, and change his perception and approach to problem solving. He shared with the researcher his reflections from changing his underlying values and assumptions:

*Energetics helped me change my values and assumptions so that I do not take problems at face value. Energetics has helped me be more mindful of my values and assumptions and understand how my values and assumptions influence my behavior. My perception of a problem and my approach to problem solving is different than in the past.*

**Unit #4 – change in the behavior.** Prior to Energetics the behaviors and assumptions of this participant were acknowledged as being disconnected. After taking Energetics, he became aware of this disconnect and was able to change his behavior. He shared with the researcher how Energetics helped him become more aware of what he espoused and what he enacted:

*Energetics has helped me to be more aware of what am I saying, portraying, feeling, and how I communicate verbally and non-verbally. In the past, there had been a disconnect*

*between my behavior and my values and assumptions that I had never been called out on before.*

Applying the discipline of Energetics helped the participant become self-aware, create a more productive work environment, create more effective exchanges with colleagues, and change his behavior to become a better coach, mentor and leader. He also found applicability of Energetics in helping others:

*Profound! Energetics helped me to become self-aware. It has made me a better leader and a better employee. I use Energetics in the workplace to help create a more productive and effective experience. After Energetics I am able to focus on my own energy and behaving positively. Energetics has helped me to mentor people I work with and when they are afraid to ask for help, talk about a problem, reflect on their own behavior, and Energetics has helped me to coach them and relieve their anxiety so they feel comfortable coming to me for help.*

Likert data suggested that Unit #1, Unit #2, Unit #3, and Unit #4 were supported (Table 9). After conducting the semi-structured interview with Participant 4 the researcher expected high percentage increases in units 1-4. As Participant 4 referred in the semi-structured interview how much he *learned from Energetics*. The researcher was surprised with Participant 4's responses to the Likert-Scale questions, as data indicated a 25% increase across all Units, however from his responses it was not clear why. Participant 4 shared with the researcher that he *agreed* (4 on the Likert scale) that he could do units 1-4 at some level of *agreement* before taking Energetics. Participant 4 also communicated there was a wide breadth between each of the Likert units 1-4 making the difference between 4 (agree) and 5 (strongly agree) quite expansive. As

stated by Participant 4, *Energetics had a profound impact that made him a better coach, mentor and leader.*

Table 9

*Participant 4 Unit of Analysis Responses*

Units	Unit #1a. Reflective ability before Energetics.	Unit #1b. Reflective ability after Energetics.	Unit #2a. Identification ability before Energetics.	Unit #2b. Identification ability after Energetics.	Unit #3a. Ability to change values and assumptions before Energetics.	Unit #3b. Ability to change values and assumptions after Energetics.	Unit #4a. Ability to change behavior before Energetics.	Unit #4b. Ability to change behavior after Energetics.
Reported score	4	5	4	5	4	5	4	5
Percentage Change between Units a and Units b	25% Increase		25% Increase		25% Increase		25% Increase	

**Case 5.** Participant 5 was a female late-career professional who held a doctoral level degree, had a training and human resource background, and held a learning and development occupation in the health services sector. Participant 5 expressed that she *really connected* with several participants in her Energetics cohort. She also expressed to the researcher that *Energetics has changed my world* and that she *has been a student of Energetics for many years*. The following sub-sections outlined her unit-wide responses.

**Unit #1 – critical reflection of self-behavior.** The participant critically reflected on her own behavior during after the problem, she sought out information and feedback from others, and determined how to change her behavior and move forward as observed in the participant quote:

*I try and reflect critically during and after the occurrence of the problem and reflect on how to best move forward. I will talk with others involved in the problem to seek out information and feedback.*

**Unit #2 – identification of values or assumptions underlying behavior.** The participant identified that her underlying values and assumptions were subconscious and they showed up in her behavior when she interacted with others. She alluded to not being cognitively aware of the values and assumptions underlying her behavior in her statement:

*My values and assumptions are in my subconscious and while I may not be cognitively aware of them they have worked for me. I know they are there because they show up when I talk to and engage with people.*

Participating in the Energetics training helped the participant identify and solidify what she held to be truth about her own assumptions and values as stated in this quote:

*Energetics solidified that what I knew about my values and assumptions were true.*

**Unit #3 – changes in underlying values and assumptions.** Through Energetics training, the participant learned to reflect on feedback and when her behavior has contributed to a problem at work. She stated:

*I have learned to reflect on what others say when I receive feedback and when I contributed to a problem at work in some way.*

Taking Energetics helped the participant to become more aware of self, more aware of others, and a sense of power to influence her own behavior. She stated:

*Energetics gave me a greater sense of power and influence over myself. I have become better aware of self and thus better aware of others.*

**Unit #4 – change in the behavior.** During workplace problem solving the participant was quick to take personal responsibility for her behavior, and quick to seek resolution by means of changing her underlying values, assumptions, and behavior that led to the problem. She declared:



*Yes, I am very quick to take ownership and resolve it by changing my assumptions and behavior.*

Applying the discipline of Energetics helped the participant gain a deeper understanding of the problem, increase her level of self-confidence and change her behavior. Participant 5 stated:

*The Energetics courses helped me gain a deeper understanding about what was going on so that I felt confident in the power to make personal behavioral changes and make things right.*

Likert data suggested that Unit #1, Unit #2, Unit #3, and Unit #4 were supported (Table 10). The participant rated herself as 4 (agree) in all four Units prior to taking Energetics and 5 (strongly agree) in all four units after taking Energetics. This indicated a 25% increase in all four units and perhaps suggested that Participant 4 was already confident in her knowledge, skills, and abilities prior to enrollment in the Energetics Institute. Overall, the participant responses suggested a need to *fix problems, hear others out, and help others share their perspective*. She was frank in stating, *I am very automatic with problem solving at work*.

Table 10

*Participant 5 Unit of Analysis Responses*

Units	Unit #1a. Reflective ability before Energetics.	Unit #1b. Reflective ability after Energetics.	Unit #2a. Identification ability before Energetics.	Unit #2b. Identification ability after Energetics.	Unit #3a. Ability to change values and assumptions before Energetics.	Unit #3b. Ability to change values and assumptions after Energetics.	Unit #4a. Ability to change behavior before Energetics.	Unit #4b. Ability to change behavior after Energetics.
Reported score	4	5	4	5	4	5	4	5
Percentage Change between Units a and Units b	25% Increase		25% Increase		25% Increase		25% Increase	

**Case 6.** Participant 6 was a female late-career professional who held a masters degree and leadership role in education in the health services sector. After introductions between Participant 6 and the researcher, Participant 6 immediately stated *I'm going to be an outlier*. The researcher was taken aback but asked for clarification. Participant 6 then clarified by stating *Energetics was not for me*. The following sub-sections outlined her unit-wide responses.

**Unit #1 – critical reflection of self-behavior.** The participant critically reflected during times of meditation after the occurrence of the problem. She stated:

*I reflect through meditation. I do this immediately after the problem.*

**Unit #2 – identification of values or assumptions underlying the behavior.** The participant stated she treated others based on her values and assumptions, which she felt, have never caused a problem. This can be observed from her statement:

*I am not sure I know. I treat others the way I want to be treated – or based on my values and assumptions. To the extent that my underlying values and assumptions or behavior caused the problem that has never happened.*

Taking Energetics helped the participant identify and affirm the values and assumptions that she felt already existed. She stated:

*I do not think that my values and assumptions really changed much. Energetics affirmed how I felt.*

**Unit #3 – changes in underlying values and assumptions.** The participant did not change her underlying values and assumptions because she did not believe her behavior contributed to workplace problems. She stated:

*My behavior does not lead to problems and I do not deal with problems.*

Taking Energetics helped the participant understand her underlying values and assumptions. This was an interesting statement by the participant, a statement that was inconsistent with previous statements. She confirmed that Energetics training:

*It helped me to understand my values and assumptions.*

**Unit #4 – change in the behavior.** The participant did not believe that her behavior led to workplace problems therefore, she did not change her behavior after the Energetic training. She shared this statement with the researcher:

*I did not change my behaviors because my behavior does not cause or lead to problems.*

The researcher found it interesting that the participant did not believe that her behaviors caused or led to problems because her next statement declared that the Energetics training helped her change her action. The participant elaborated:

*Yes, it did by helping me change my action. I prepare differently for meetings and for difficult situations. It does not have anything to do with my values and assumptions.*

Likert-scale data suggested Unit #1 and Unit #4 were supported (Table 11). In Unit #2 and Unit #4 there is no indication of support. Specifically, the participant rated herself the same pre and post Energetics with a 4 (agree) in Unit #2 her ability to identify values and assumptions underlying behavior. In Unit #3, the participant rated herself 2 (disagree) pre and post Energetics in her ability to change values and assumptions. Data for both Unit #2 and Unit #3 indicated a zero increase. Participant 6 stressed that she *is very well established in her career* and that *her behavior does not lead to problems*, that she is *not ever part of the problem*, and that she *does not deal with problems*. She was also clearly communicated to the researcher that *values and assumptions have nothing to do with behavior*. This was a very unusual case as Participant 6 held a key leadership role with multiple direct reports and was directly responsible for critical

education programs. She also indicated that *yes* Energetics helped her *change her action* and one might suggest that action is synonymous with behavior.

Table 11

*Participant 6 Unit of Analysis Responses*

Units	Unit #1a. Reflective ability before Energetics.	Unit #1b. Reflective ability after Energetics.	Unit #2a. Identification ability before Energetics.	Unit #2b. Identification ability after Energetics.	Unit #3a. Ability to change values and assumptions before Energetics.	Unit #3b. Ability to change values and assumptions after Energetics.	Unit #4a. Ability to change behavior before Energetics.	Unit #4b. Ability to change behavior after Energetics.
Reported score	4	5	4	4	2	2	4	5
Percentage Change between Units a and Units b	25% Increase		0% No Increase		0% No Increase		25% Increase	

**Case 7.** Participant 7 was a female doctoral student who was a mid-career professional in management occupations. Participant 7 shared with the researcher that *I have always relied heavily on my own instincts, feeling that they would guide me to make decisions that served my family well.* Participant 7 was not raised in American culture. The following sub-sections outlined her unit-wide responses.

**Unit #1 – critical reflection of self-behavior.** The participant made notes when she became aware her behavior was contributing to a problem. After the occurrence of the problem she reflected critically to understand her behavior and determine if it was influenced by past experience, culture or shadow self. It can be observed by what she stated:

*I try to understand and be aware of the way I behave. I take notes if I am able to; otherwise I keep it to myself. In the moment I try to focus and not to think about it out of respect for the other people (if I am in a meeting perhaps). When I catch myself behaving poorly, I take a deep breath and jot down a quick note to come back to it for reflection.*

*On my way home I think about it, was it a reflection of myself, shadow self, did it remind me of a previous situation or something from childhood?*

**Unit #2 – identification of values or assumptions underlying the behavior.** The participant was mindful of the values or assumptions that contributed to her behavior; was mindful of if she realized they did or not contribute to the behavior; and tried to determine what mattered and what did not in terms of the matter being accomplished. She clarified in her quote:

*I ask myself if there was anything that influenced my thinking that I did not even realize led to my behavior? If I am very mindful, I am really open and accepting of everything. There are days when things bug me or they make me feel different so then I try and identify and determine what caused it – when I get to the root of my values and assumptions I ask does that really matter; do I care what that person was thinking; were we able to accomplish what we were there to accomplish?*

Simply put, Energetics training freed her from the past by shedding harmful values and assumptions that had been imposed on her since childhood, by identifying the values and assumptions that matter to her now, and changing her behavior to live the life she currently desired. Through Energetics training she has become more accountable for her life journey:

*Energetics helped me in several ways. I am able to better identify my core values that are really true rather than those that were taught or imposed on me. I am better able to put my values into perspective and I am more relaxed about what is going on around me. In a way assumptions that were taught to me like feeling sorry for someone or feeling bad about things have taught me that I am responsible for me. The discipline of Energetics has helped me to erase and file some of my past assumptions. It is my journey and*

*knowledge of Energetics, being able to truly identify my values and assumptions and then change those values and assumptions has freed me of my past.*

**Unit #3 – changes in underlying values and assumptions.** During workplace problem solving the participant was able to acknowledge and readjust the assumptions she held. She changed her behavior to honor others feeling and refrained from judgment or interference. She stated:

*If I notice in meetings that I have started defending my point of view, and/or I start to speak faster, and/or I notice energy change in self and in room, I catch myself and momentarily reflect, readjust and acknowledge values and assumptions that are in play. Through reflection I may realize that I am not honoring others' feelings or their needs and I need to stop and say that it is okay without judgment or interference.*

Taking Energetics helped the participant shed harmful underlying values and assumptions that were inherent to the culture she was raised in. She stated:

*Letting go of assumptions was really an important learning from Energetics. I had underlying values and assumptions that were inherent to the culture I was raised in. Energetics taught me how to understand and rid self of harmful underlying assumptions and values.*

**Unit #4 – change in the behavior.** Following workplace problems the participant jotted down notes to reflect on whether her behavior was a result of her values or assumptions and then changed her behavior. She stated:

*I was able to change my behaviors through reflection – when I saw that I was having difficulties working with someone I would take notes and reflect at the end of the day or when I had a chance. Through reflection I may have realized that I had been too*

*controlling so as a result, the next time I will go to that person and ask how can we work together effectively so we will both be successful? I also listen to the other person and realize their behaviors are based on their values, assumptions and perhaps out of fear or work pressure (supervisor, individual development plan). I acknowledge that it is not for me to change their behavior but for me to decipher the situation to determine why I approached the situation the way I did and what was the root cause of my behavior? I reflect on whether my behavior was a result of my values, or assumptions.*

Applying the discipline of Energetics helped the participant critically reflect at a deeper level to find the root cause and change her behavior. She stated:

*As a result of Energetics, I am able to reflect at a deeper level and see myself in a mirror. I use Energetics to reflect deeper to find the root of the situation or my behavior and address it.*

Likert-scale data suggested that Unit #1, Unit #2, Unit #3, and Unit #4 were supported (Table 12). While the changes were a 66% increase in Unit #2, Unit #3, and Unit #4, the participant indicated only a 25% increase in Unit #1 reflective ability after taking Energetics. The participant rated her ability to reflect as 4 (agree) prior to Energetics and 5 (strongly agree) post Energetics. The data suggested a high ability to critically reflect pre Energetics training. The researcher found this to be evident as the participant shared stories and examples about her very personal and deeply held values and assumptions that were culturally embedded in her upbringing. She found the most value of Energetics in *shedding these harmful values and assumptions and constructing new values and assumptions*. As a result of this very dedicated effort to shed harmful values and assumptions her *health, happiness, family, and work life have drastically improved*. She sees things in a new way and *thinks differently*; therefore her *behavior*

*has changed for the better.* The researcher found Participant 7 to be very self-aware and not afraid to take risk associated with challenging her past, her upbringing, and her deeply held beliefs. She expressed that this is something she had been working on for years and Energetics *made it all come together, has transformed her life, and is lasting.*

Table 12

*Participant 7 Unit of Analysis Responses*

Units	Unit #1a. Reflective ability before Energetics.	Unit #1b. Reflective ability after Energetics.	Unit #2a. Identification ability before Energetics.	Unit #2b. Identification ability after Energetics.	Unit #3a. Ability to change values and assumptions before Energetics.	Unit #3b. Ability to change values and assumptions after Energetics.	Unit #4a. Ability to change behavior before Energetics.	Unit #4b. Ability to change behavior after Energetics.
Reported score	4	5	3	5	3	5	3	5
Percentage Change between Units a and Units b	25% Increase		66% Increase		66% Increase		66% Increase	

**Case 8.** Participant 8 held a doctoral degree and was a mid-career professional in the legal sector. Participant 8 explained the ramifications of not following a methodical process in her occupation. She was very detail oriented, focused on the facts, and pushed socially constructed boundaries to find the truth. The following sub-sections outlined her unit-wide responses.

**Unit #1 – critical reflection of self-behavior.** When the participant faced a problem at work she followed a very methodical process of critically reflecting on the conversation, reviewing any documentation relevant to the situation, reflecting on what information was available to her, reflecting on her emotional and mental state, reflecting on her behavior and its contribution to the problem. She stated:

*When I face a problem at work the first thing I do is reflect on the conversations I had and/or go back through my emails to see if there was something I missed or misstated. I*



*then reflect on where I was mentally and emotionally then I review the information that was available to me. From there, if it was my behavior that caused the problem then I tried to figure it out through reflection and find clarity of the issue. For me, reflection is a very methodical process. I want to know all the facts surrounding the problem and the effects of my actions and all the intermediary actions that occurred before trying to resolve the problem.*

**Unit #2 – identification of values or assumptions underlying the behavior.** In a specific workplace scenario, the participant identified that she valued being treated with respect and for her professional expertise and when that value was not being acknowledged and respected by another her behavior contributed to the workplace problem. She stated:

*There was a situation that occurred when I had to work directly with a gentleman that consistently frustrated me with every interaction. Finally, I took a moment pause to reflect and ask myself, what is really bothering me about this situation and this gentleman? What I realized was this gentleman did not treat me with the knowledge and expertise that I had – he did not even approach me from a place of neutral or professional respect – he did not recognize that I was trying to help. I identified and acknowledged that I valued being treated with respect and for my expertise*

Taking Energetics helped the participant to stop and make time for critical reflection, and to identify values and assumptions that contributed to her behavior. She stated:

*Energetics taught me to ask probing questions when you get in situations at work where there is an issue or a problem and to step back for a moment and reflect. If I had not taken Energetics, I would not have stopped to identify my values and assumptions.*

*Without Energetics I do not think people can identify their values and assumptions on a conscious level.*

**Unit #3 – changes in underlying values and assumptions.** During workplace problem solving the participant changed her underlying values and assumptions by reflecting on the situation and acknowledging she was making assumptions about the person. She was then able to change her way of thinking and her behavior that contributed to the problem. She stated:

*In reflecting on a situation at work, I was making assumptions about the person and the situation that was affecting my behavior and my way of thinking. I realized those were my beliefs, assumptions, and perceptions that were interfering and being imposed on the situation.*

The participant applied Energetics to a methodical process to change her underlying values and assumptions and gain confidence to change her behavior and resolve workplace problems. She stated:

*I went through a step-by-step process of figuring out what bothered me about work situations and what I could do to resolve the situations or make them better, so I could feel confident in what I was doing. Much of this was changing my underlying values and assumptions about people and situations*

**Unit #4 – change in the behavior.** The participant continued to apply the discipline of Energetics to her methodical process to change her values, assumptions, and behavior as needed in times of workplace problem solving. She stated:

*Changing my behavior is an ongoing process. Energetics has given me the skills necessary to change my assumptions about people and situations and to change what I personally value.*

Applying the discipline of Energetics helped the participant critically reflect on her own behavior and to change her behavior. She attributes positive interactions in the workplace and a decline in workplace problems to Energetics and her own behavior change. She stated:

*Without Energetics I would not have reflected upon my own behavior. Often I assumed it was someone else that was the problem and it was very rare that I would turn it around and look at myself first and what my contributions to the problem were. After Energetics, I noticed the frequency in my workplace problems decline. Energetics helped me to sit back and analyze, decipher, and reflect on situations from a distance and place of neutral, then figure them out without blaming of self. Energetics and deciphering helped me to figure out how I contributed to the problem and what needed to be done to change my behavior. The reason I am having such good interactions in the workplace is because of Energetics and my own behavior change.*

Likert-scale data suggested that Unit #1, Unit #2, Unit #3, and Unit #4 were supported (Table 13). Participant 8 provided very detailed and specific responses that accurately addressed the questions being asked. Perhaps that is due to the nature of her profession or her methodical process, while others – like the researcher did through the interview, might find through reading her case that she seemed very self-aware and able to reflect critically about her values, assumptions, and behaviors as it related to workplace problem solving after taking Energetics. The most substantial increase, 150% in Unit #3, was an increase in ability to change her values and assumptions after taking Energetics. It was interesting to learn that Participant 6 employed her step-by-step methodical process to delve deeper into her values and assumptions and make change.

Table 13

*Participant 8 Unit of Analysis Responses*

Units	Unit #1a. Reflective ability before Energetics.	Unit #1b. Reflective ability after Energetics.	Unit #2a. Identification ability before Energetics.	Unit #2b. Identification ability after Energetics.	Unit #3a. Ability to change values and assumptions before Energetics.	Unit #3b. Ability to change values and assumptions after Energetics.	Unit #4a. Ability to change behavior before Energetics.	Unit #4b. Ability to change behavior after Energetics.
Reported score	3	5	3	5	2	5	3	5
Percentage Change between Units a and Units b	66% Increase		66% Increase		150% Increase		66% Increase	

**Case 9.** Participant 9 held a masters level degree and had an education and occupations background in education, leadership, training and development, and human resource management. She was a late-career professional who held leadership positions with and without direct reports for over 20 years. She expressed that she has had a very good education and career with many opportunities for self-improvement, personal, and professional development. Participant 9 also disclosed that she had formal training with Meyers-Briggs Type Indicator and other behavioral and personality assessments and profilers. She asked the researcher if other participants interviewed for the study were at other points in their careers, had difficult careers, or perhaps had fewer professional development opportunities. Participant 9 expressed interest in the study findings and was very willing to participate. The following sub-sections outlined her unit-wide responses.

***Unit #1 – critical reflection of self-behaviors.*** The participant critically reflected on her behavior, and the verbal and non-verbal communication that may have contributed to the problem at work. She ruminated upon whether she changed her style and behavior to complement the other persons behavior and style; she attempted to identify breakdowns in communication; and she pondered about how she could change her own behavior to avoid future breakdowns in communication. She affirmed:

*I reflect upon my behavior and I recap the situation to reflect upon my word choice, my body language, and my tone. Most of the individuals I encounter I have worked with in the past, so I kind of know how they are so I reflect on whether I adjusted my style and behavior to their behavior and their style. I reflect on whether I articulated what I was thinking and if there was a problem. Perhaps I thought something about the situation went wrong, such as with communication, I then tried to reflect on where those breaks in communication were and what I could do to change my behavior to fix it so it does not occur again.*

**Unit #2 – identification of values or assumptions underlying behavior.** The participant indicated that she valued an inclusive environment, yet once she felt she had the majority of the information in situations of workplace problem solving she would make the decision based on the assumption she was right. She stated:

*One of my assumptions is that once I feel I have the majority of the information, which for me is 80-85% of the information, I then make the decision because I assume I will be right. I value an inclusive environment so my behavior is to include as many people in making the decision as I can.*

The critical reflection exercises threaded throughout the Energetics training were paramount to the participant identifying her values and assumptions and uncovering beliefs about who she was. Through the Energetics training the participant came to understand how her values and assumptions impacted her behavior and to take control over her behavior. Understanding the connections between her values, assumptions, and behaviors helped her move forward in times of workplace problem solving, as described by the participant:

*Energetics helped me to figure out who I am and what I stand for by identifying and critically reflecting on my values and assumptions. After every Energetics exercise and every Energetics class I engaged in reflection, so it enforced the need for me to think about my values, assumptions, and interactions with others and what worked well for me, what did not work well, and for me to understand that I have control over my own behaviors and that I do not have control over others behaviors. It involved understanding that it is my values and assumptions that drive my approach and response to any given situation and those values and assumptions can help me move forward in a situation or take steps back.*

**Unit #3- changes in underlying values and assumptions.** The participant indicated that she had changed some of her underlying values and assumptions after taking Energetics and learned to trust in her new values. Moreover she expressed the value of clarifying her intentions and expectations to others in times of workplace problem solving. She conveys this through her quote:

*Energetics made me focus on the value of clarifying my intentions and expectations in work situations. Energetics also taught me that I needed to change some of my values, certainly my assumptions, and then to rely on my own personal values when I am in a workplace conflict or problem-solving situation.*

**Unit #4 – change in the behavior.** After taking Energetics the participant changed her behavior by seeking resolution with others in times of workplace conflict. Furthermore, the participant expressed the value in Energetics methods that helped her reflect on her role in workplace problem solving and methods that helped her change her behavior toward self and others. The participant shared an illustration of this in the following quote:

*There was a situation with a co-worker where it was not a good relationship. After Energetics I sought a resolution. We learned practices that helped me improve my behaviors towards myself, others, and those I had problems with. The resolution involved me changing my behaviors, reflecting on my own behavior, and reflecting on how I was contributing to the problem.*

Likert-scale data suggested Unit #1, Unit #2, Unit #3, and Unit #4 were supported (Table 14). While the change in Unit #3 was substantially higher than other units, the participant indicated only a 25% increase in Unit #1, Unit #2, and Unit #4. The participant self-reported 4 (agree) pre Energetics, and 5 (strongly agree) post Energetics training in each of Unit #1, Unit #2, and Unit #4. Participant 9 was a human resource development professional who had engaged in *countless self-improvement activities* in her career, including *formal training in Myers-Briggs Type Indicator* and other assessments. Perhaps this education and experience explained the high self-report for Unit #1, Unit #2, and Unit #4. The participants' data indicated a 66% increase in Unit #3 – ability to change values or assumptions underlying behavior. Participant 9 shared, *Energetics taught me that I needed to change some of my assumptions when I am in a workplace conflict or problem-solving situation. This is an area the participant is aware needed development.*

Table 14

*Participant 9 Unit of Analysis Responses*

Units	Unit #1a. Reflective ability before Energetics.	Unit #1b. Reflective ability after Energetics.	Unit #2a. Identification ability before Energetics.	Unit #2b. Identification ability after Energetics.	Unit #3a. Ability to change values and assumptions before Energetics.	Unit #3b. Ability to change values and assumptions after Energetics.	Unit #4a. Ability to change behavior before Energetics.	Unit #4b. Ability to change behavior after Energetics.
Reported score	4	5	4	5	3	5	4	5
Percentage Change between Units a and	25% Increase		25% Increase		66% Increase		25% Increase	

Units b				
---------	--	--	--	--

**Case 10.** Participant 10 was a female executive leader who held a doctoral degree. She was a late-career professional who had formal education and work experience with management, training and education, and human resource occupations. Participant 10 also participated in a formal journey of leadership development as it related to mindfulness, emotional regulation, and the neurosciences. The following sub-sections outlined her unit-wide responses.

***Unit #1 – critical reflection of self-behavior.*** The participant described her process for critical reflection of self-behavior as having removed herself from the workplace problem, posed a question to herself about the role her behavior played in the problem, allowed her unconscious mind to ruminate on the question, and then returned to the question at a later time. The participant shared that through this process, further reflections of self-behavior surfaced that she needed to heed. She described this process and further considerations in this quote:

*I reflected on my own behavior when I faced a problem at work by stepping back from the situation and thinking about it. I have learned that I need to pose a question to myself about my own behavior then move onto something else and come back to the question later. Later, when I come up with ideas, I reflect on the pros and cons of the situation, the potential outcomes, the different people and styles, and my behavior.*

***Unit #2 – identification of values or assumptions underlying behavior.*** After taking the Energetics training the participant was more adept at understanding and identifying the values and assumptions underlying her behavior. She shared that taking Energetics helped her become a better leader as she is now more mindful, has increased her ability to regulate her emotions, improved her critical reflection skills, and increased the depth and breadth of critical reflection.



She shared the positive implications of identification of the values and assumptions underlying her behavior in the following statement:

*After completing the Energetics courses, I have been more self-reflective and more aware of my underlying values and assumptions. Energetics has helped me to be a better leader, regulate my emotions, and be more mindful. Energetics significantly helped me to reflect – reflecting to be, reflecting to focus, reflecting to understand what is happening to me, and to decipher situations. Energetics helped me understand and identify my values and assumptions.*

**Unit #3 – changes in underlying values and assumptions.** After taking the Energetics courses the participant held herself accountable for her own behavior and thus changed harmful underlying values and assumptions that had not served her well. In the following quote, the participant shared an example about judgment as a change in underlying values and assumptions:

*Energetics changed my values. I was very judgmental and that was a major value for me that I changed. Through Energetics I looked at myself and I learned to be responsible for my behavior and myself. Energetics helped me to change my values and assumptions so they are useful, not harmful, and through Energetics I have become much more accountable.*

**Unit #4 – change in the behavior.** Prior to taking the Energetics courses the participant was aware she needed change her behavior. She described however, being considerably more successful making behavior change after Energetics. She recounted how after Energetics she was more skilled in use of self-as-instrument, more adept at adjusting her behavior in the moment, had increased confidence, and had become more thoughtful. These suggested that her changes in behavior improved workplace problem solving. In the following quote, she described the



	Energetics.	Energetics.			assumptions before Energetics.	assumptions after Energetics.	before Energetics.	after Energetics.
Reported score	3	5	2	4	2	5	3	5
Percentage Change between Units a and Units b	66% Increase		100% Increase		150% Increase		66% Increase	

**Case 11.** Participant 11 was a mid-career professional whose occupation included management and human resource responsibilities. She held a masters level degree and described her working days as *hectic* and of *never being able to complete her own agenda*. She recounted stories of a tendency to *get wrapped up in things at work that others were involved in*. She also shared that *when situations, or problems, arise she wondered why a person would do that – such as, how they were communicating, how they were making decisions, and how they were approaching conflict*. The following sub-sections outlined her unit-wide responses.

***Unit #1 – critical reflection of self-behaviors.*** The participant commonly practiced critical reflection at home after the occurrence of workplace problems. Through critical reflection she attempted to look at the situation holistically and uncover what impact her behavior had on the problem. She described critical reflection of self-behaviors in the following quote:

*Reflection is not usually immediate for me it happens after the fact and often when I am at home. I may reflect on why someone or something frustrated me at work. I may reflect on why that person may not be looking at what I, or the company, has done or put into a project. Through reflection I try to figure out what impact my behavior had on the situation or problem.*

***Unit #2 – identification of values or assumptions underlying behavior.*** After taking Energetics that participant was more deliberate with the identification process. As part of the

process to identify the values or assumptions underlying her behavior, she would down tempo, regulated her breathing, and focused on interpreting the situation to understand the values or assumptions that previously caused her to react without pause. In the following statement, the participant shares the identification process, the values she holds, and how she has become more mindful of the values and assumptions underlying her behaviors:

*Taking Energetics helped me slow down, learn to recognize and identify the values and assumptions that I have. Energetics helps me to take time to breathe, decipher, and to stop making knee jerk reactions and decisions. I value staying positive, reminding others to stay positive, and I value helping others learn not to make judgments. Since Energetics, I have noticed that I judge others but have become much more quick to reel back and deal with the situation at hand. I try to be very mindful when reflecting on my assumptions and how they contributed to my behavior.*

**Unit #3 – changes in underlying values and assumptions.** The participant acknowledged that prior to the Energetics training, her predetermined solutions made her part of the workplace problem. After taking the Energetics training the participant was focused on changing the values and assumptions underlying her behavior that impacted her communication as described in the following statement:

*In the past, I focused on my pre-described solution and that made me part of the problem. I am now working on my communication and behavioral skills that stem from my values and assumptions.*

**Unit #4 – changes in the behavior.** Although the participant did not specifically state what behaviors changed, she alluded to changed behavior and increased confidence as a result of application of the discipline of Energetics. In the following quote, the participant shared an

illustration that behavior change grew her confidence and led to increased credibility and support at work:

*Applying the discipline of Energetics made behavior change a lot easier for me. I had to become more fully present; and being fully present or fully with it is a lot of work. I make a concerted effort to bring my subconscious to the present and change my behavior.*

*The reflection exercise helped me build my self-confidence and having confidence helps me get buy-in from the others (peers, senior leaders, subordinates). I know that I appear, and am, more credible when I am self-confident.*

Likert-scale data suggested Unit #1, Unit #2, Unit #3, and Unit #4 were supported (Table 16). While there was a substantial increase of 66% in Unit #3 – ability to change values and assumptions data indicated a 25% increase in Unit #1, Unit #2 and Unit #4. The participant self-reported 4 (agree) pre-Energetics training, and 5 (strong agree) post-Energetics training in Unit #1, Unit #2 and Unit #4 which suggested a high ability in each of the three units prior to Energetics training. Perhaps, a background in human resources provided her experiences in these unit categories.

Table 16

*Participant 11 Unit of Analysis Responses*

Units	Unit #1a. Reflective ability before Energetics.	Unit #1b. Reflective ability after Energetics.	Unit #2a. Identification ability before Energetics.	Unit #2b. Identification ability after Energetics.	Unit #3a. Ability to change values and assumptions before Energetics.	Unit #3b. Ability to change values and assumptions after Energetics.	Unit #4a. Ability to change behavior before Energetics.	Unit #4b. Ability to change behavior after Energetics.
Reported score	4	5	4	5	3	5	4	5
Percentage Change between Units a and Units b	25% Increase		25% Increase		66% Increase		25% Increase	

**Case 12.** Participant 12 held a doctoral level degree and was a late-career professional nearing retirement. Participant 12 was quick to share with the researcher that she was *strategic* and a *big picture visionary thinker* so she *saw patterns in her behavior that others may not*. She professed to be *very intuitive* and to *have gone with her gut feeling* when it came to workplace problem solving. The following sub-sections outlined her unit-wide responses.

***Unit #1 – critical reflection of self-behavior.*** The participant did not reveal specific illustrations of critical reflection of self-behavior during the conversation with the researcher. She did however; allude to a changed critical reflection process after the Energetics training in which she examined assumptions, negative feelings, priorities, and values that affected self-behavior in workplace problem solving as interpreted from the following quote:

*When I reflect now, after taking Energetics, I ponder on “does it really matter?” I think that has helped me be better at letting go of assumptions and negative feelings. I do a quick gut check and later reflect to understand what my priorities and values are as it relates to the situation?*

***Unit #2 – identification of values or assumptions underlying behavior.*** After the Energetics training the participant found her values to be more discernible. She was quite contented in her ability to identify values underlying her behavior but remained somewhat challenged in the identification of her assumptions as illustrated in the following quote:

*I am able to identify my values pretty quickly and comfortably – my values have not changed much but they have become clearer. I needed to step away from a situation or problem and reflect, as I am not good at checking my assumptions in the moment. It takes me more time and more energy and I find they are harder to identify. Energetics helped me clarify my way and trust my way.*

**Unit #3 – changes in underlying values and assumptions.** An unexpected response to Unit #3 questions was this participant felt safer after taking the Energetics courses. She believed Energetics helped her; perhaps because she gained awareness of the underlying assumptions that she needed to change. In the following quote, she provided this illustration and alluded to her underlying assumptions being masked prior to Energetics:

*After Energetics I feel safer. My values have not changed but I am making progress with my assumptions. My eyes are open more and I see my assumptions through a wider lens. I was pretty deep in the closet about my assumptions. Energetics did help me.*

**Unit #4 – changes in the behavior.** The participant used Energetics methods to absolve deep-rooted wounds and change her behavior in the workplace. She shared new insights about her values, assumptions, and behavior with the researcher in the following statement:

*After Energetics, I began a new job and I began seeing things through new eyes. I saw how I behaved in the past and how my values and assumptions contributed to my problems, so now the things that I was doing before I am not doing in this job. In the past, I was never the reason for the problem! Energetics helped me to purge deep wounds, eliminate the garbage in my life, and...I have become very positive as a result.*

Likert-scale data suggested that Unit #1, Unit #2, Unit #3, and Unit #4 were supported (Table 17). While the changes were substantially higher in other Units, data indicated only a 25% increase in Unit #1 – critical reflection of self-behaviors. Participant 12 indicated a high level of ability to critically reflect prior to Energetics as indicated in her response of 4 (agree) pre-Energetics training. The most substantial increase was Unit #4 – changes in the behavior. This could be in part due to Participant 12's participation *in other interventions and therapy that have helped* her change behavior. This was an interesting case, as some of the participant

responses to open-ended questions did not align with the Likert-Scale data. Due to the holistic nature of a case study, it is evident if you read through all four units it can be presumed there is a clear occurrence of double-loop learning.

Table 17

*Participant 12 Unit of Analysis Responses*

Units	Unit #1a. Reflective ability before Energetics.	Unit #1b. Reflective ability after Energetics.	Unit #2a. Identification ability before Energetics.	Unit #2b. Identification ability after Energetics.	Unit #3a. Ability to change values and assumptions before Energetics.	Unit #3b. Ability to change values and assumptions after Energetics.	Unit #4a. Ability to change behavior before Energetics.	Unit #4b. Ability to change behavior after Energetics.
Reported score	4	5	2	4	2	4	2	5
Percentage Change between Units a and Units b	25% Increase		100% Increase		100% Increase		150% Increase	

**Case 13.** Participant 13 was a mid-career professional who held a doctoral level degree. Participant 13 shared with the researcher that she was well read on the topics of intuition, meditation, healing, and Energetic abilities. The following sub-sections outlined her unit-wide responses.

***Unit #1 – critical reflection of self-behavior.*** The participant engaged in critical reflection of self-behavior holistically as illustrated in her response. Meaning, she reflected on the situation, problem prevention, problem perpetuation, and self-behavior mistakes made. She stated:

*I reflect consciously, I am a really reflective person so I think about the situation, what role I played, how I could have prevented the problem, how I perpetuated the situation and if I did, and I tried to pinpoint the spot where it went wrong.*

***Unit #2 – identification of values or assumptions underlying behavior.*** The participant attributed her ability to identify the values and assumptions underlying her behavior to



Energetics. Through Energetics the participant became increasingly proficient at identifying the values and assumptions at the root of workplace issues. Furthermore, the participant shared that identification of values or assumptions underlying behavior was used for problem prevention as mentioned in her quote:

*I try to understand my values and assumptions, to differentiate them, and identify and acknowledge them when they show up. Energetics helped me to get the problem or situation out of my head by looking beneath the surface to the root of the issue, which was a reflection of my values and assumptions. I attribute the ability to look at the root issue and reflect on my values and assumptions to Energetics. Energetics helped me identify my values and assumptions in an effort to prevent problems from happening in the first place.*

**Unit #3 – changes in underlying values and assumptions.** The participant was quick to share that while it is atypical for her values to change, the application of the discipline of Energetics improved her ability to detect values that had been hidden. Changes in underlying assumptions seemed equally difficult for the participant to articulate. Prior to taking Energetics the participant allowed her assumptions to guide her behavior. After taking Energetics, the participant responded to workplace problems by employing preventative behaviors and limiting reactions to assumptions in the moment. She shared the following illustration with the researcher:

*My values do not typically change, but something may conflict with a value I did not know I had, so then I step back and apply Energetics so I can learn about and recognize the value. I also place much more value on emotions like empathy. Some of my assumptions have changed, I know it but I cannot always articulate it. I used to act in*

*alignment with my assumptions, but now I am quick to recognize my assumptions and I understand why I behave the way I do. I am trying to behave in a more preventative way versus reacting to assumptions in the moment.*

**Unit #4 – changes in the behavior.** Energetics had a resounding impact on the participant and her ability to preemptively change her behavior.

*After taking Energetics I have the ability to see where situations and problems are headed, so I can change my behavior preventatively. For me it has been a profound change in behavior including how I act and how I see situations, other people, problems, and myself. Energetics has really resonated with me.*

Likert-scale data suggested Unit #1, Unit #2, Unit #3, and Unit #4 were supported (Table 18). While the changes were substantially higher in other Units, the participant indicated only a 25% increase in critical reflection of self-behaviors after Energetics. Participant 13 shared with the researcher that she was a *critically reflective person who made a conscious effort to reflect*. Therefore, a pre-Energetics score of 4 (agree) and increase of 25% is appropriate for Unit #1. A plausible explanation of the more substantial 66% increase in Unit #2, Unit #3, and Unit #4 was shared by the participant, *my beliefs and ways of knowing aligned well with Energetics*, this was perhaps an indicator of her openness to Energetics and to change which reflected in the data.

Table 18

*Participant 13 Unit of Analysis Responses*

Units	Unit #1a. Reflective ability before Energetics.	Unit #1b. Reflective ability after Energetics.	Unit #2a. Identification ability before Energetics.	Unit #2b. Identification ability after Energetics.	Unit #3a. Ability to change values and assumptions before Energetics.	Unit #3b. Ability to change values and assumptions after Energetics.	Unit #4a. Ability to change behavior before Energetics.	Unit #4b. Ability to change behavior after Energetics.
Reported score	4	5	3	5	3	5	3	5
Percentage Change between Units a and	25% Increase		66% Increase		66% Increase		66% Increase	

Units b				
---------	--	--	--	--

**Case 14.** Participant 14 held a doctoral level degree and was a late-career professional approaching retirement. In his career, he held leadership roles and was responsible for direct reports and their professional development. He graduated from the Energetics Institute and also conducted postgraduate-level research on Energetics, values and assumptions, single-loop, and double-loop and triple-loop learning. He stated that he was *well qualified* and *deeply prepared* to respond to the researchers questions for the study. The following sub-sections outlined his unit-wide responses.

***Unit #1 – critical reflection of self-behaviors.*** The participant had a process of restricting critical reflection of self-behaviors to the problem, and expressed personal motives of reflections and contributions as well. This can be gleamed from his statement:

*I go through the reflection process for my own sake. When reflecting I bound the situation and work to decipher the problem and my contributions to that problem.*

***Unit #2 – identification of values or assumptions underlying behavior.*** As observed in the participant statement, his values and assumptions were *transformed* through Energetics. He stated:

*My values and prior assumptions have transformed, evolved, transcended, and have explained a number or peculiarities in my thinking that suddenly became clearly defined.*

***Unit #3 – changes in underlying values and assumptions.*** The participant suggested that change in his underlying values and assumptions may be needed to treat others with respect. This was observed in his statement:

*I have a responsibility to change my underlying assumptions and values and to treat the people with a high regard. This means I often need to change my assumptions and perhaps my values.*

**Unit #4 – changes in behavior.** The participant used self-as-instrument to make change in behavior and engage with others as suggested in his statement:

*Energetics helped me profoundly in changing my behavior. Energetics helped because it gave me tools to engage with people.... As a practitioner, I use Energetics by preparing self first before working with clients or interacting with colleagues. This changes my behavior....*

Likert-scale data suggested Unit #1, Unit #2, and Unit #3 were supported (Table 19).

Data indicated a 25% increase in Unit #1, Unit #2, and Unit #3 and no increase in Unit #4. A no increase in Unit #4 was surprising since the participant specifically stated during the interview *Energetics helped me profoundly in changing my behavior.* As evidenced in the participants' quotes and Likert-scale data, there were inconsistencies and contradictory evidence. This can be observed in the participant statements *I have always been able to change my behavior* and through Energetics *I experienced transformational learning.* Perhaps it was difficult for the participant to distinguish between Energetics training and Energetics research; either way Energetics did appear to foster double-loop learning with Participant 14.

Table 19

*Participant 14 Unit of Analysis Responses*

Units	Unit #1a. Reflective ability before Energetics.	Unit #1b. Reflective ability after Energetics.	Unit #2a. Identification ability before Energetics.	Unit #2b. Identification ability after Energetics.	Unit #3a. Ability to change values and assumptions before Energetics.	Unit #3b. Ability to change values and assumptions after Energetics.	Unit #4a. Ability to change behavior before Energetics.	Unit #4b. Ability to change behavior after Energetics.
Reported score	4	5	4	5	4	5	5	5
Percentage	25%		25%		25%		0%	

Change between Units a and Units b	Increase	Increase	Increase	No Increase
------------------------------------	----------	----------	----------	-------------

**Case 15.** Participant 15 held a masters level degree and was a late-career professional. She was self-employed and worked with many sectors of business in the occupation of education, training, development, and continuous improvement. With a high regard for life, self-awareness, and self-improvement she underwent various types of therapy and both formal and informal education in disciplines that have similarities to Energetics. The following sub-sections outlined her unit-wide responses.

***Unit #1 – critical reflection of self-behavior.*** The participant used journaling and self-reflection frequently to gain awareness of self-behavior. She The participant alluded to a deeper level of awareness and critical reflection as aided by Energetics and observed in her statement:

*I reflect often and I do so by holding up a mirror so I can see how I behave. This area of reflection and having an awareness of my own behavior has really changed for me. Prior to Energetics I would get upset or crabby about problems or people and now I spend time journaling during (if possible) and after an event. Then I reflect on the situation to determine why I behaved the way I did.*

***Unit #2 – identification of values or assumptions underlying behavior.*** Energetics helped the participant identify values, assumptions and beliefs underlying her behavior. She succinctly stated:

*Yes, it did. It helped me to work on identify my values, beliefs, assumptions, and changing them energetically.*

***Unit #3 – changes in underlying values and assumptions.*** After taking Energetics, the participant had a new perspective of work and of the world that resulted from changed

underlying values and assumptions. The participant explained the paradigm shift she experienced in this quote:

*Yes, I have changed my underlying values and assumptions and Energetics has caused me to shift my lens, such as; the way I see myself, the way I see others, the way I view my work, and the way I see the world. I shift the paradigm around the problem and you have to change your assumptions to do this. I certainly changed my assumptions about perspectives and lenses.*

**Unit #4 – change in the behavior.** After taking Energetics, the participant was able to reflect at a deeper level and make change in the behavior. She suggested change in the behavior has made her a better OD practitioner and person:

*Energetics made it easier to reflect and explore a deeper part of myself, including my Energetic levels, and change what was not working for me. It gave me the tools, skills, and methods to make the changes in my behavior. This has made me a better person and a better practitioner.*

Liker-scale data suggested Unit #2, Unit #3, and Unit #4 were supported (Table 20).

While there were increases in other Units, data indicated no increase in Unit #1 – critical reflection of self-behaviors. The Likert data was not consistent with the response to the open-ended question for the Unit wherein Participant 13 stated *this area of reflection and having an awareness of my own behavior has really changed for me* after taking Energetics. Even a small increase of 25% would have been expected based on the open-ended response. Perhaps the years Participant 13 has spent journaling, reading, and reflecting made her confident in her reflective ability before taking Energetics to the point that she perhaps moved from a low-level 5 before Energetics to a high-level 5 after Energetics. If the area of reflection really changed for her, then

there was support of Unit #1. Another interesting Likert statistic was the 100% increase in Unit #2 – identification of values and assumptions underlying the behavior and a 33% increase in Unit #3 – ability to change values and assumptions. After reviewing the percentages it made sense, identification was often easier than change. In Unit #2 – identification of values and assumptions underlying the behavior her reported score was 2 (disagree) before Energetics and 4 (agree) after whereas in Unit #3 – changes in underlying values and assumptions her reported score was 3 (neutral) before and 4 (agree) after Energetics. What this meant is that before taking Energetics, she self-reported being better able to change her values and assumptions than being able to identify them. The researcher suggests that this is inconsistent with her responses to open-ended questions and not highly probable – meaning – one has to ask themselves is it truly possible to change something if you cannot identify it?

Table 20

*Participant 15 Unit of Analysis Responses*

Units	Unit #1a. Reflective ability before Energetics.	Unit #1b. Reflective ability after Energetics.	Unit #2a. Identification ability before Energetics.	Unit #2b. Identification ability after Energetics.	Unit #3a. Ability to change values and assumptions before Energetics.	Unit #3b. Ability to change values and assumptions after Energetics.	Unit #4a. Ability to change behavior before Energetics.	Unit #4b. Ability to change behavior after Energetics.
Reported score	5	5	2	4	3	4	2	4
Percentage Change between Units a and Units b	0% No Increase		100% Increase		33% Increase		100% Increase	

**Case 16.** Participant 16 was a late-career professional who held a doctoral level degree. She has held various leadership positions. At the time of the interview she held a senior leadership position with a group of direct reports and very broad base of constituents. The core focus of her leadership role was on relationship development within a very wide variety of

organizations and people in terms of sectors, demographics, psychographics, and physical location. The following sub-sections outlined her unit-wide responses.

***Unit #1 – critical reflection of self-behaviors.*** The participant divulged a step-by-step process for critical reflection of self-behaviors. This consisted of problem analysis, data gathering, questioning, observation, and ultimately reflection and action. This process can be observed in her statement:

*When I critically reflect I do a number of things; I look at the problem and try and get enough (pertinent) information as I can; I ask lots of questions to fill the holes in my own understanding of the situation; I try to get the lay of the land; I pay attention to my reactions and emotions and let those percolate if I can; I judge the severity of the problem to see if it needs immediate attention or not; I try and determine what single and double-loop learning is happening; I surmise the situation, reflect, and garner additional support, resources, and reflect on how to act.*

***Unit #2 – identification of values or assumptions underlying behavior.*** After Energetics the participant had the ability to identify the values and assumptions underlying her behavior, discern her motivations, and to be more mindful of the values and assumptions impacting her interactions. In her quote she explained:

*Energetics provided me with the skills and knowledge to have a high ability to describe what leads to my behavior. I know my frame of reference and I know my filters, biases, assumptions, and values. I can discern what is motivating me to act, which is my assumptions and values, and this is fairly consistent. Energetics allowed me to be more balanced and calm. This usually makes me more mindful of my interactions and what values and assumptions are driving these interactions.*



**Unit #3 – changes in underlying values and assumptions.** The participant identified changes in underlying values and assumptions, she succinctly stated:

*I have used Energetics to switch my assumptions. I have a greater belief about the assumption that what you put out into the universe comes back to you and I value this belief. I now value and believe that everything; people, the environment, etc is interconnected and I focus on wholeness.*

**Unit #4 – changes in the behavior.** The participant employed Energetics for emotional regulation and other internal factors that may not have been easily observed by others. After Energetics she has been more aware of her behavior, more mindful, and made changes in her behavior. She described Energetics to be beneficial as a workplace employee and as a practitioner as observed in her statement:

*My behavior changes may not always be readily visible to others, as I have focused on internal changes and ways to manage my emotions. I have been pretty successful employing Energetics and I am very aware when I do not. It helped me learn to be more mindful of my behavior. It also gave me many more practitioner tools for my toolkit. I am aware of my behavior more often on a personal level and I have seen a dramatic change in my behavior.*

Likert-scale data suggested Unit #1, Unit #2, Unit #3, and Unit #4 were supported (Table 21). While there was a significant increase in all other Units, there was only a slight increase of 25% in Unit #1 – critical reflection of self-behaviors, a skill that Participant 16 *felt confident* in to a certain degree before taking Energetics. Data indicated the most significant increase of 150% in Unit #4 –changes in the behavior after taking Energetics whereas she was still working on her ability to change the values and assumptions underlying her behavior. Energetics helped

Participant 16 *take a step back from the situation and detach from situations and workplace problems*. Perhaps through the act of detaching she was not giving herself the opportunity to change the values and assumptions underlying her behaviors.

Table 21

*Participant 16 Unit of Analysis Responses*

Units	Unit #1a. Reflective ability before Energetics.	Unit #1b. Reflective ability after Energetics.	Unit #2a. Identification ability before Energetics.	Unit #2b. Identification ability after Energetics.	Unit #3a. Ability to change values and assumptions before Energetics.	Unit #3b. Ability to change values and assumptions after Energetics.	Unit #4a. Ability to change behavior before Energetics.	Unit #4b. Ability to change behavior after Energetics.
Reported score	4	5	3	5	2	4	2	5
Percentage Change between Units a and Units b	25% Increase		66% Increase		100% Increase		150% Increase	

**Summary of Participant Case-by-Case Responses.** Sixteen participant case-by-case responses were presented in this section. Each case represented a single participant in the research study and provided a description and analysis of the single case. The researcher relied on both Likert-Scale responses and open-ended and probe responses from the semi-structured interview for collecting data from each case. Likert scale responses were used to determine whether there was any evidence in support of the posited theory. Of the sixteen cases, thirteen provided clear supportive evidence. Of the remaining three, two cases reported highest pre-Energetics score for any of the four Units and therefore no increase was plausible to report. Therefore, it was just one case that did not indicate any evidence in support of theory. Aggregate data is presented in Table 22.

Table 22

*Aggregate Participant Ratings*

ID#	Unit #1. Ability to reflect critically on own behavior.				Unit #2. Ability to identify underlying values or assumptions that contributed to the problem.				Unit #3. Ability to change underlying values and assumptions that led to behavior.				Unit #4. Ability to change behaviors that contributed to the problem.				Theory Supported
	Unit #1a. Reflective ability before Energetics.	Unit #1b. Reflective ability after Energetics.	Percentage Increase	Unit Supported (Yes/ No)	Unit #2a. Identification ability before Energetics.	Unit #2b. Identification ability after Energetics.	Percentage Increase	Unit Supported (Yes/ No)	Unit #3a. Ability to change values and assumptions before Energetics.	Unit #3b. Ability to change values and assumptions after Energetics.	Percentage Increase	Unit Supported (Yes/ No)	Unit #4a. Ability to change behavior before Energetics.	Unit #4b. Ability to change behavior after Energetics.	Percentage Increase	Unit Supported (Yes/ No)	
1	4	5	25%	Yes	2	5	150%	Yes	2	4	100%	Yes	2	5	150%	Yes	Yes
2	2	5	150%	Yes	2	4	100%	Yes	2	4	100%	Yes	2	5	150%	Yes	Yes
3	3	5	66%	Yes	3	5	66%	Yes	2	4	100%	Yes	3	4	33%	Yes	Yes
4	4	5	25%	Yes	4	5	25%	Yes	4	5	25%	Yes	4	5	25%	Yes	Yes
5	4	5	25%	Yes	4	5	25%	Yes	4	5	25%	Yes	4	5	25%	Yes	Yes
6	4	5	25%	Yes	4	4	0%	No	2	2	0%	No	4	5	25%	Yes	No
7	4	5	25%	Yes	3	5	66%	Yes	3	5	66%	Yes	3	5	66%	Yes	Yes
8	3	5	66%	Yes	3	5	66%	Yes	2	5	150%	Yes	3	5	66%	Yes	Yes
9	4	5	25%	Yes	4	5	25%	Yes	3	5	66%	Yes	4	5	25%	Yes	Yes
10	3	5	66%	Yes	2	4	100%	Yes	2	5	150%	Yes	3	5	66%	Yes	Yes
11	4	5	25%	Yes	4	5	25%	Yes	3	5	66%	Yes	4	5	25%	Yes	Yes
12	4	5	25%	Yes	2	4	100%	Yes	2	4	100%	Yes	2	5	150%	Yes	Yes
13	4	5	25%	Yes	3	5	66%	Yes	3	5	66%	Yes	3	5	66%	Yes	Yes
14	4	5	25%	Yes	4	5	25%	Yes	4	5	25%	Yes	5	5	0%	No	No
15	5	5	0%	No	2	4	100%	Yes	3	4	33%	Yes	2	4	100%	Yes	No
16	4	5	25%	Yes	3	5	66%	Yes	2	4	100%	Yes	2	5	150%	Yes	Yes
Average	3.75	5	33.30%	Yes	3.06	4.49	65%	Yes	2.69	4.44	53.02%	Yes	3.13	4.88	59.10%	Yes	Yes

**Cross-Case Analysis**

While the case-by-case analysis provided evidence for the overall support for the posited theory, cross-case analysis provided a general pattern within data that revealed **how** Energetics led to increase in the various Units that in turn created double loop learning.

Unit #1 questions assessed participant’s ability to reflect critically on their own behavior that may have contributed to the problem. Barring one case; all other reported a 25% or greater increase in their ability to reflect critically after taking Energetics. In this case, the participant had reported the highest possible level of critical reflection ability before the Energetics and therefore no increase was reported. One participant reported a 150% increase. While the average of participants’ reported pre-Energetics ability to reflect critically was 3.75, they reported a post-Energetics training average of 5. The range of pre-training capability to reflect critically was between 2 and 5, whereas the range of post-training capability to reflect critically was 5 for all participants. Participants who supported the researcher’s theory in this unit said their ability to reflect critically on their own behavior increased after taking the Energetics courses as indicated by the data presented in Table 23. All participants together reported an average of 33.3% increase, much higher than the 25% cut-off determined for theory-support in this research.

Table 23

*Unit #1 – Ability to Reflect Critically on Behavior*

Likert Scale Response Options	Unit #1a. Reflective ability before Energetics.					Unit #1b. Reflective ability after Energetics.					Number of Participants who fully supported the unit	Percentage increase	Unit supported Yes or No
	1 Strongly Disagree	2 Disagree	3 Neither Agree nor Disagree	4 Agree	5 Strongly Agree	1 Strongly Disagree	2 Disagree	3 Neither Agree nor Disagree	4 Agree	5 Strongly Agree			
Number of Responses	0	1	3	11	1	0	0	0	0	16	16	33.30%	Yes

Several general patterns emerged from the data pertaining to Unit 1. First of all, *seeking a common ground* emerged as a general outcome of critical reflection. Participants reached a

common ground through *open-mindedness, mindfulness, attention to reactions*, and with an increased awareness for *communication breakdown*. Energetics helped participants in developing ways for seeking feedback about their behavior/communication from others and also for becoming more *aware* of the word choices, body language, tone of the conversation etc. This increase in attention to their own and others' behavior helped participants assess and let go of their biases that had a profound impact on the situation. Notably, participants developed this ability to critically reflect after the moments of conflict/disagreement were over. In other words, participants became able to revisit the situation and assess theirs and others behavior neutrally and objectively with an open mindedness to reinitiate the communication. As one of the participants noted: “...*After reflection, I may elect to email the person I had the problem with to share some initial thoughts and ask if we can meet and discuss the situation further.*”

Unit #2 questions assessed participant's ability to identify underlying values and assumptions that contributed to the behavior. Barring on case, all other cases indicated a 25% or greater increase. Four cases reported a 100% increase whereas one of the cases reported a 150% increase after taking Energetics. Regardless of the quantitative variation in increase across cases, all cases shared an underlying shift in their ability to identify their existing values and assumptions as a result of the Energetics.

Participants overall reported a 65% gain in their ability to identify underlying values or assumptions that contributed to the problem (Table 24). While the average of their reported pre-Energetics ability to identify was 3.06, they reported a post-Energetics training average of 4.49. The range of pre-training capability to identify was between 2 and 4, whereas the range of post-training capability to identify was either 4 or 5.

Table 24

*Unit #2 – Ability to Identify Underlying Values or Assumptions that Contributed to the Problem*

Likert Scale Response Options	Unit #2a. Identification ability before Energetics.					Unit #2b. Identification ability after Energetics.					Number of Participants who fully supported the unit	Percentage increase	Unit supported Yes or No
	1	2	3	4	5	1	2	3	4	5			
	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree			
Number of Responses	0	5	5	6	0	0	0	0	5	11	16	65%	Yes

One of the general patterns emerged from data revealed that the Energetics helped participants explore the *root cause* of their values and assumptions. Participants reported that this exploration enabled them to identify their *core values*, which provided *clarity to existing values*. Participants generally shared that Energetics helped them understand how their assumptions were shaped by their past experiences. Participants commonly shared that Energetics helped them consciously learn about their assumptions and values, which, they reported, operated at a *subconscious level* and needed awakened *deciphering*. Participants also shared how Energetics helped them regulate their emotions—which in turn, helped them better identify their values and assumptions.

One of the participants reported no change in Unit #2 and rated agree (4) before taking Energetics on the Likert scale and agree (4) after taking Energetics on the Likert scale. This participant specifically stated, *“I do not think that my values and assumptions really changed much. Energetics affirmed how I felt. I knew I did things a certain way but I did not know why. I balance at work multiple times daily and in different situations.”* Further interaction during the interview indicated that this participant through life events and experiences had developed good critical reflection abilities and while no increase was reported in identification of assumptions, it was clear that the participant became more aware of her own abilities and thus Energetics affirmed and solidified her critical reflection and values identification abilities.

Unit #3 questions addressed participant’s ability to change their underlying values and assumptions. Barring one, all other 15 cases indicated a 25% or greater increase. Five cases indicated a 100% increase in ability after taking Energetics; and two of the cases indicated a 150% increase in ability after taking Energetics. All participants together reported an average of 53% increase, much higher than the 25% cut-off determined for theory-support in this research (Table 25). While the average of their reported pre-Energetics ability to change underlying values and assumptions was 2.69, they reported a post-Energetics training average of 4.44. The range of pre-training capability to change underlying values and assumptions was between 2 and 4, whereas the range of post-training capability to change underlying values and assumptions was between 2 and 5.

Table 25

*Unit #3 – Ability to Change Underlying Values and Assumptions*

Likert Scale Response Options	Unit #3a. Ability to change values and assumptions before Energetics.					Unit #3b. Ability to change values and assumptions after Energetics.					Number of Participants who fully supported the unit	Percentage increase	Unit supported Yes or No
	1 Strongly Disagree	2 Disagree	3 Neither Agree nor Disagree	4 Agree	5 Strongly Agree	1 Strongly Disagree	2 Disagree	3 Neither Agree nor Disagree	4 Agree	5 Strongly Agree			
Number of Responses	0	8	5	3	0	0	1	0	6	9	15	53.02%	Yes

A general pattern that emerged from the data indicated that participants stressed an increase in their ability to look at their assumptions and values through a *wider lens*, which led them to have a deeper understanding of self. Participants commonly held that they proactively sought feedback from others about their behaviors (and others reactions to their behaviors) which provided them unprecedented insights in to their own behavior, the assumptions underlying this behavior, and provided an opportunity to change their assumptions based on the *feedback* received from others. Another pattern that emerged from participant data was a shift in participants’ analysis of others from being an analytical to later become reflective in nature,

which involved a holistic understanding of others. This change in analytical frame of reference helped participants change their values and assumptions about others and about themselves. It was more aptly expressed by one of the participants:

*“Energetics changed my values and assumptions in a pretty big way! At a pretty core level I would say...”*

Unit #4 questions addressed participant’s ability to change behaviors that contributed to the problem. Barring one, all other cases reported at least a 25% increase in their ability to change their behavior. The only case that did not report any change was the one where the participant reported a highest possible score on Likert-scale question even before taking the Energetics, which left no room for reporting any potential increase. Four of the cases indicated a 150% increase and one case indicated a 100% increase. Overall 88% of the cases indicated support of #1 with an average of 59% increase (Table 26).

Table 26

*Unit #4 – Ability to Change Their Behavior*

Likert Scale Response Options	Unit #4a. Ability to change behavior before Energetics.					Unit #4b. Ability to change behavior after Energetics.					Number of Participants who fully supported the unit	Percentage increase	Unit supported Yes or No
	1 Strongly Disagree	2 Disagree	3 Neither Agree nor Disagree	4 Agree	5 Strongly Agree	1 Strongly Disagree	2 Disagree	3 Neither Agree nor Disagree	4 Agree	5 Strongly Agree			
Number of Responses	0	5	5	5	1	0	0	0	2	14	16	59.10%	Yes

Participants linked their ability to change their behavior to the increase in their preparedness to change their behavior as a result of Energetics. They commonly expressed an increase in their self-confidence, self-awareness, and an enabling effect of Energetics for their effectiveness at work. Participants also shared that they experienced several other subtle changes in their behavior—changes that were hard to notice both to them and to others but had profound



impact on their behavior. One such underlying change included a *fundamental change in participants' interaction with others*.

**Cross-Case Findings Summary.** Overall, the researcher found evidence in support of her posited theory with a 33.30% increase in unit #1 – ability to critically reflect on own behavior; with a 65% increase in unit #2 – ability to identify underlying values or assumptions that contributed to the problem; with a 53.02% increase in unit #3 – ability to change underlying values and assumptions that led to behavior; and an increase of 59.10% in unit #4 – ability to change behaviors that contributed to the problem.

Interview data suggested that while there were significant thematic overlaps across the four Units, the flow of the behavioral change largely followed from Unit 1 through Unit 4. Change in behavior phenomenon was fundamentally reported to be linked with critical reflection, identification of value or assumptions, and a subsequent change in values or assumptions. Since these elements together lead to the occurrence of double-loop learning, this study provided preliminary evidence that Energetics helps in fundamental change in behavior and fosters double-loop learning.

## **Chapter V: Discussion**

The researcher tested her theory that application of skills and concepts learned from the discipline of Energetics fosters the process of double-loop learning. The data collected from 16 participants, who were graduates of the Energetics institutes, were used to test this theory. This chapter includes a summary of significant findings, discussion and theoretical and applied implications, significance of the study, limitations of the study, and recommendations for future research.

### **Summary of Findings**

The most significant finding from the research was the overall support of the posited theory that the discipline of Energetics fosters double-loop learning. Each individual unit was empirically supported by the interview data as well as by the Likert-type data. There were few cases where posited/expected increase within different units was not reported due to high pre-Energetics levels scores. Interview data in such cases, however, suggested that participants gained in many more ways than Likert-type scale could capture. In their stories, participants clearly revealed how critical reflection formed the basis for the identification of theirs and others' basic assumptions and values. This identification brought about changes in their own basic assumptions and helped them understand their core assumptions and values. The process finally led to a change in their behavior. The researcher assumes that the process of behavior change is not a linear process and is an outcome of a number of simultaneously occurring, complex cognitive phenomena. Therefore, it is possible that participants changed in some subtle ways, and they did not link this change to the fact of taking Energetics classes.

### **Discussion**

This study is critical in both a theoretical and practical sense. On the theoretical side, the data generated and insights gained through this study add to the current body of knowledge on Energetics and subtle energies. Specifically, research on Energetics and subtle energies has been conducted in medicine and therapy (Oschman, 2000, 2003, 2008, 2009, 2010; Srinivasan, 2010; Tiller, 1993, 2004), understanding and conception of the universe (Anderson, 2003; Braden, 2010) and to a lesser extent in organizations (Cross, Baker & Parker, 2003; Schiuma, Mason & Kennerley, 2007; Spoth, 2006) and for OD practitioners (Heorhiadi & Conbere, 2008). While theories are not absolute, evidence shows that application of the discipline of Energetics fosters double-loop learning. If “new organization development approaches urge that we replace prevalent mechanistic, materialist; profit orientated, and function based paradigm with an integrated, dynamic and systemic vision of a sustainable learning community that reflects universal values and global consciousness” (Karakas, 2009) and “any organization at any given time can be characterized by a specific energy state” (Schiuma, Mason, & Kennedy, 2007) then perhaps OD practitioners who gain certification in Energetics training may be better prepared to help today’s organizations. Research on Energetics and double-loop learning has centered on a relatively untapped model in OD. It offers a new way for OD practitioners to create positive change in the lives of people and organizations. Research suggests that offering training and consulting programs on Energetics might help OD practitioners be more effective. For example, as Heorhiadi and Conbere (2008) suggested, “the use of Energetics can save a client valuable time and resources by avoiding OD interventions that will not be a solution for their problems, or by maximizing the efficiency when interventions are made” (p. 39). This study also expands on the existing scholarship in the field of double-loop learning by linking it to the Energetics field. By proposing and testing a theory about Energetics and double-loop learning, this study helps

working professionals better understand the value of (i) the discipline of Energetics, including, (ii) critical-reflection, (iii) self-as-instrument of change, and (iv) organizational learning.

This study contributes to the knowledge of OD practitioners in two ways. In order to be an OD practitioner an individual has to be self-aware and self-reflective. This will be discussed in the following sub-sections beginning with self-as-instrument of change.

**Self-as-Instrument of Change.** Knowing self, developing high self-awareness, using self-as-instrument of change, and understanding the use of self are all important concepts that have been researched, analyzed, and discussed in books and peer-reviewed journal articles for decades. These key concepts can be found threaded into countless leadership development programs and have also been taught in different variations at the masters and doctoral levels at universities that span the globe. In fact, the concept “self-as-instrument of change” is at the heart of Organization Development. This begins with OD practitioners understanding that they cannot work completely separate from their client organization. The moment that an OD practitioner begins to communicate with members of the organization, that practitioner begins to make a difference in the organization. That practitioner becomes an “instrument of change.” It is up to the practitioner to be aware of self and others and intentionally use this awareness to advance the work with the client. This is using self-as-instrument of change. “Self-as-instrument is a core concept in OD” (Heorhiadi & Conbere, 2008), and one cannot be a successful OD practitioner and agent of change if one does not understand oneself as the “tool” and how that tool should be used. OD practitioners must stay in tune with self and much of that means continuing to revisit, reaffirm, or renew personal values, and manage personal biases and assumptions that stem from these values.

**Organization Development Practitioner Competencies.** Having an awareness of one’s

personal values and being able to manage personal biases is so important in the field of Organization Development that they can be found on the OD Network website as competencies under the heading Self-Awareness. To be specific, it is stated on the OD Network website that an effective OD practitioner can clarify personal values and manage personal biases. Clarifying personal values, managing personal biases and cultivating self-awareness involve risk. What stops one from taking this risk? Perhaps a lack of courage, presence of power relations, culture or upbringing, education or lack of, fear of then having to behave authentically, or perhaps an unease with what might be revealed through a heightened self-awareness.

**Self-as-Instrument and Double-Loop Learning.** It becomes difficult to distinguish how one could be an effective OD practitioner and use self-as-instrument appropriately without continually engaging in double-loop learning. The two concepts are so tightly interwoven that perhaps self-as-instrument cannot exist without double-loop learning. In fact, Heorhiadi & Conbere (2008) are “convinced that not knowing self as energetic being leads to incomplete knowledge of self and incomplete ability to work with or relate to people, other energetic beings” (p. 38) thus suggesting that Energetics is a necessary element for effective use of self-as-instrument of change. Through use of self-as-instrument one would reflect critically to detect a mismatch or inequality and consciously change the underlying values to intentionally change the behaviors of self. This is precisely the skill and concepts participant’s learned from the discipline of Energetics that fostered double-loop learning. Essentially, the whole self constitutes a person’s identity including their values, thoughts, feelings, perceptions, attitudes, and beliefs (Hanson, 2007). How an OD practitioner projects self or manages self-as-instrument is critical to the relationship with client organizations. Projection of self is an intervention and can positively or negatively impact organizations. OD practitioner image of self can be projected in many ways,

some of which are reflected in behaviors that may be blind spots or subconscious behaviors a practitioner is not aware of. Energetics training attempts to surface these behaviors and what lies beneath to a conscious level. It can be difficult for practitioners to move beyond simple surface level reflection of self as image, but if one can, critical reflection becomes very powerful because attention is directed to the root of the problem (O'Neil & Marsick, 2007). Such as with Energetics training wherein participants critically reflect on self-behavior and the errors and mismatches in self-behavior driven by their governing values and assumptions. It is stated by O'Neil (et. al, 2008) that "creating situations for reflection and critical reflection are two of the most important interventions to help promote learning" (p. 14) and Energetics training was designed to create these situations. To be effective professionally, an OD practitioner must be consciously aware of self and the image one portrays. Often times, an OD practitioner cannot stop to reflect so having the ability to reflect-in-action; described by Schön (1983; 1987) as a combination of thinking and acting while not stopping to think, nor rushing to find a solution is necessary to be a reflective OD practitioner. The ability to reflect critically on self-behaviors, cultivate self-awareness and manage self-as-instrument is critical for those wanting to become more effective in the role of OD practitioner as it enables them to learn about themselves and understand the complexity of self. Exploring self and engaging in critical reflection about the past, present, and future can be a catalyst for learning. The best practitioners not only seek out feedback to know themselves better and to understand opportunities for improvement, but as a discipline, Energetics allows practitioners to critically reflect and deal consciously with who one is as a person by surfacing governing values and assumptions, isolating their preferences and detecting errors or mismatches between behavior and intention so they can make corrections and position themselves for success. OD practitioners trained in Energetics tend to be more self-

aware, and mindful of their own behavior, errors and mismatches. They have the willingness and skill set to make change – all of which are necessary for effective use of self-as-instrument of change. Energetics fosters increased awareness of self, and “greater self-awareness enables one to make more informed choices arrived at independent of external forces and pressures” (Hanson, 2000). These skills are critical within the setting of modern day learning organizations.

**Energetics Training.** Energetics fosters double-loop learning and “gives a practitioner more ability to understand self” (Heorhiadi & Conbere, 2008, p. 37). Furthermore, “knowledge of one’s Energetic self results in (a) improved personal health and (b) increased Energetic sensitivity which helps in work with groups or individuals” (Heorhiadi & Conbere, 2008, p. 38). This, of course does not happen overnight but rather the process of understanding self and double-loop learning begins when participants freely elect to enroll in Energetics training. Generally, those who enter into Energetics training have a desire and willingness to change self-behaviors and/or understand self. Through Energetics training participants learn how to detect error and critically reflect on their governing assumptions or values that drive self-behaviors. Through critical reflection activities built into Energetics training participants discover their errors or mismatches between their intentions and actual consequences of the self-behavior that are produced by inconsistencies in the governing values underlying the strategies of action they use to actualize their values (Argyris, 1997). Through critical reflection and identification participants in this study changed their governing values or assumptions thus changed their behavior. Argyris and Schön (1974; 1978) described a change in governing values that lead to counterproductive behavior as double-loop learning. Therefore, application of the skills and concepts learned from the discipline of Energetics fosters the process of double-loop learning.

**Organizational Learning.** On the other hand, OD practitioners are increasingly concerned for fostering double-loop learning in organizations as a vehicle to create learning organizations. According to Argyris (1995) “learning occurs whenever errors are detected and corrected, or when a match between intentions and consequences is produced for the first time” (p. 20). In many organizations, a correction to the behavior is made and single-loop learning occurs (Argyris, 1995) and may be reinforced by managers or professional development programs. Single-loop learning creates old solutions based on traditional thinking and existing patterns of behavior. Another way to correct errors is to change the underlying values or assumptions (e.g. master program) that causes the behavior or action; this is double-loop learning (Argyris, 1995). OD practitioners are increasingly concerned about fostering double-loop learning as a means to create a sustainable and resilient learning organization. Organizational learning begins with employees, leaders and OD practitioners who have the ability to engage in critical reflection of self-behaviors and manage self-as-instrument. This is consistent with Argyris (2004) who suggested that, “practitioners in organizations become more reflective about the impact of their actions and policies on producing learning that perseveres” (p. 507). This often requires a paradigm shift focusing on how self-behaviors are viewed by individuals, managers and organizations. This shift in paradigm may only occur through the process of double-loop learning and the desire to correct errors by surfacing and changing an individual’s governing values or assumptions. This is a difficult task for OD practitioners. Kotter (2005) wrote, “the single biggest challenge in managing change is not strategy, structure, or culture, but just getting people to change their behavior” (p. 3). Participants in this study shared stories and examples that supported the theory that the discipline of Energetics fosters double-loop learning and real behavior change. In many instances, change of self-behaviors through double-loop



learning translated to increased productivity and effectiveness in the workplace, all which are important elements of a learning organization. OD practitioners might use the principles of Energetics to foster double-loop learning in employees and leaders as a starting point in cultivating a learning organization.

**Summary of Discussion.** An individual should consider their values and personal biases in order to develop effective OD intervention techniques. This study established that, Energetics enable participants to become more mindful, aware, and cognizant of themselves, others, and the contexts surrounding them. Energetics provides valuable complementary training background for practitioners and enhances the effectiveness of other OD techniques. Organization Development practitioners can apply Energetics to OD in self as instrument, diagnosing the client, and intervening with the client (Heorhiadi & Conbere, 2008). While learning is not a linear process, it is suggested that OD practitioners and leaders in organizations who choose to apply the discipline of Energetics should first begin by seeking understanding and awareness of ones own Energetic state and next through a critical examination of self-behaviors. Through critical reflection, values and assumptions underlying self-behaviors that contributed to the problem may be uncovered. Once the master program or underlying values and assumptions are identified, leaders and practitioners can apply their new Energetics skill set to change their master programs or underlying values or assumptions that led to the counterproductive behavior and thus, make lasting change to self-behaviors that contributed to the problem. This is the process of double-loop learning fostered through Energetics training. The process of double-loop learning may also be accomplished through methods, such as therapy, meditation, and leadership development programs. The key difference between these methods and the discipline of Energetics is this – through Energetics training practitioners learn how to discern the movement of subtle energy

within one's own self, discern subtle energies in others, and gather information that they may not otherwise have, and or confirm other observations (Heorhiadi & Conbere, 2008). Heorhiadi & Conbere (2008) suggest "practitioners who are trained in Energetics can be more flexible in shaping Energetic events, and thus in helping organizations sustain positive change" (p. 39). Leaders and OD practitioners should bear in mind that however double-loop learning is fostered, it is key to the development of a learning organization (Argyris, 1995). This research focused on exploring whether Energetics helped foster double-loop learning. The answer is affirmative.

### **Significance of the Study**

This research charts a new direction by uncovering the phenomena underlying behavior change through Energetics. Through this study evidence was found to support the posited theory that Energetics helped participants critically reflect on their behavior (and on others' behavior). This reflection influenced the basis for their behavioral changes. Notably, Energetics profoundly affected participants in two ways: first, participants were nearly unanimous in reporting that they learned to become more mindful of the situation, the behavioral dynamics and of the assumptions held for others and for the context. An increase in their mindfulness transformed how they viewed their relationships and communicated with others. Finally, participants' self-confidence increased and helped them approach any situation with an open mind and professional poise. These fundamental shifts characteristically reformulated the behavior and a state of mindfulness led participants to reflect on their behavior—a phenomenon that led to double-loop learning.

### **Limitations and Future Research**

The reach of this study has been limited by several factors. All data captured was self-report. Findings, from a conveniently selected sample may not capture the trends of a wider

population. Therefore, Energetics has the potential to impact different sets of participants in different ways. Notably, because the cases for this study represent a well-educated segment of the population, the results of this study may have been hindered by their academic preparedness and knowledge of self to begin with. Future studies may show how Energetics affects the process of double-loop learning in participants with varying intellectual and analytical capabilities.

While the aim of this study was to develop preliminary evidence to examine how Energetics fostered double-loop learning, further evidence should be collected, using a quantitative methodology that involves a larger sample. When conducting future research it will be important to consider the implications to the study the variables such as the content of Energetics courses, instructor and delivery of content. Also, this study was based on self-reports of participants after they received the Energetics training. Future insights might come from conducting a before-after Energetics examination; connections between Energetics and the field of Neuroscience; the impact of Energetics on other groups, such as children; and the impact of self-aware people on OD interventions. And perhaps future research may be designed to seek evidence of a correlation between Energetics and self-as-instrument.

## **Conclusion**

A key goal in modern business is to generate critically reflective people who can help build learning organizations. Creating and sustaining a learning organization may be achieved by fostering a double-loop learning process among its employees. The double-loop learning process, in turn, requires employees to become both self-reflective and capable of critically examining assumptions underlying their own values, decisions, and actions that led to certain outcomes.

In this study, the researcher found evidence that the application of the discipline of Energetics fostered the process of double-loop learning. Through the review of literature the

researcher also shared evidence that double-loop learning is fundamental for individual and organizational learning and development. Further, the data and insights gained from this research adds to the growing body of scholarship on an important topic – how to cultivate a culture of learning in modern organizations. Perhaps this is a winning way to a positive culture; one that has a strong positive belief in people, that embraces Energetics and double-loop learning, and fosters the development of critically reflective people. This positive culture may be the key to more effective leadership, increased resilience and agility, and an organization that sustain higher levels of growth and profitability over their competitors for an extended period of time.

## Reference List

- Albanese, C. L. (1999). The subtle energies of spirit: Explorations in metaphysical and new age spirituality. *Journal of the American Academy of Religion*, 67(2), 305-325.
- Algeo, J. (1987). *Reincarnation explored*. Wheaton, IL: The Theosophical Publishing House.
- Amis, J., Slack, T., & Hinings, C. R. (2002). Values and organizational change. *The Journal of Behavioral Science*, 38(4), 436-465.
- Anderson, M. (2003). Our growing understanding of subtle energies and their function in the evolving universe. *World Futures*, 59, 83-104. doi: 10.1080/02604020390108898.
- Argyris, C. (1975, April). Dangers in applying results from experimental social psychology. *American Psychologist*, 469-485.
- Argyris, C. (1976). Single-loop and double-loop models in research on decision making. *Administrative Science Quarterly*, 21(4), 363-375.
- Argyris, C. (1993). *Knowledge for action: A guide to overcoming barriers to organizational change*. San Francisco, CA: Jossey-Bass.
- Argyris, C. (1995). Action science and organizational learning. *Journal of Managerial Psychology*, 10(6), 20-26.
- Argyris, C. (1998). Manager, workers and organizations. *Society*, 35(2), 343-346. doi: 10.1007/BF02838160
- Argyris, C. (1999). *On organizational learning* (2<sup>nd</sup> ed). Malden, MA: Blackwell Business.
- Argyris, C. (2000). *Flawed advice and the management trap: How managers can know when they're getting good advice and when they're not*. New York, NY: Oxford.
- Argyris, C. (2002). Teaching smart people how to learn. *Reflections*, 4(2), 4-15.
- Argyris, C. (2003). A life full of learning. *Organization Studies*, 24(7), 1178-1192.

- Argyris, C. (2004). Reflection and beyond in research on organizational learning. *Management Learning, 35*(4), 507-509.
- Argyris, C., & Schön, D. (1974). *Theory in practice*. San Francisco, CA: Jossey-Bass.
- Argyris, C., & Schön, D. (1978). *Organizational learning*. Reading, MA: Addison-Wesley.
- Barge, J. K., & Oliver, C. (2003). Working with appreciation in managerial practice. *Academy of Management Review, 28*(1), 124-142.
- Bennis, W. G. (1969). *Organization development: Its nature, origins and prospects*. Reading: MA, Addison-Wesley.
- Bokeno, R. M. (2003). Introduction: Appraisals of organizational learning as emancipatory change. *Journal of Organizational Change Management, 16*(6), 603-618.
- Braden, G. (2007). *The divine matrix: Bridging time, space, miracles and belief*. New York, NY: Hay House.
- Braham, B. J. (1996). *Creating a learning organization*. London, England: Kogan Page.
- Brookfield, S. (1988). *Developing critically reflective practitioners: A rationale for training educators of adults. Training educators of adults: The theory and practice of graduate adult education*. New York, NY: Routledge.
- Brookfield, S. D. (2000). The concept of critically reflective practice, in Wilson, A. L., & Hayes, E. R. *Handbook of adult and continuing education*. San Francisco, CA: Jossey-Bass.
- Brookfield, S. D. (2005). *The power of critical theory: Liberating adult learning and teaching*. San Francisco, CA: Jossey-Bass.
- Cashman, K. (1998). *Leadership from the inside out: Becoming a leader for life*. Minneapolis, MN: TCLG, LLC.
- Cheung-Judge, M. (2001). The self-as-instrument: A cornerstone for the future of OD. *OD*

- Practitioner*, 33(3), 11-16.
- Clawson, J. G. S. (2008). Leadership as managing energy. *International Journal of Organizational Analysis*, 16(3), 174-181.
- Cooperrider, D. L., Sorensen, P. F. Jr., Yaeger, T. F., & Whitney, D. (2001). *Appreciative inquiry: an emerging direction for organization development*. Champaign, IL: Stipes Publishing, LLC.
- Cross, R., & Baker, W., & Parker, A. (2003). What creates energy in organizations? *MIT Sloan Management Review*, 44(4), 51-56.
- Daft, R. L., & Lengel, R. H. (2000). *Fusion leadership: Unlocking the subtle forces that change people and organizations*. San Francisco, CA: Berrett-Koehler.
- Denton, J. (1998). *Organizational learning and effectiveness*. London, England: Routledge.
- Drury, L. O'C. (2009). Energetic particles in the universe; how does nature beat CERN? *Plasma Physics and Controlled Fusion*, 51(1), 1-7.
- Dubin, R. (1978). *Theory building*. New York, NY: The Free Press.
- Eden, D., & Feinstein, D. (2008). *Energy medicine: Balancing your body's energies for optimal health, joy, and vitality*. New York, NY: Penguin Group.
- Emery, M. (1993). *Participative design for participative democracy*. Canberra: Center for Continuing Education. Australian National University.
- Fink, A. (2009). *How to conduct surveys: A step-by-step guide* (4<sup>th</sup> ed). Thousand Oaks, CA: SAGE Publications, Inc.
- Fredrick, M. N. (2008). Consensus building, dialogue and spirituality principles of the learning organization paradigm: Implications for Kenya's public service reform agenda. *Journal of Third World Studies*, 25(2), 153.

- Fredrick, M. N. (2009). HRD's role in identifying, measuring, and managing knowledge assets in the intangible economy. *Advances in Developing Human Resources, 11*(3), 399.
- Gall, M. D., Gall, J. P., & Borg, W. R. (2003). *Educational research: An introduction*. Boston, MA: A & B Publications.
- Garratt, B. (1995). Helicopters and rotting fish: Developing strategic thinking and new roles for direction-givers. In Garratt, B. (Ed.). *Developing strategic thought: Rediscovering the art of direction-giving*. London, England: McGraw-Hill.
- Gerber, R. (2001). *Vibrational medicine*. Rochester, VT: Bear & Company.
- Ghaly, M., & Teplitz, D. (2004). The biologic effects of grounding the human body during sleep as measured by cortisol levels and subjective reporting of sleep, pain, and stress. *The Journal of Alternative and Complementary Medicine, 10*(5), 767-776.
- Glavas, A., Jules, C., & Van Oosten, E. (2006). Use of self in creating a culture of collaboration. In S. Schuman (Ed.), *Creating a culture of collaboration*. San Francisco, CA: Jossey-Bass.
- Greene, J. & Haidt, J. (2002). How (and where) does moral judgment work. *Trends in Cognitive Science, 6*(12), 517-523.
- Hanson, P. G. (2000). The self as an instrument for change. *Organization Development Journal, 18*(1), 95-105.
- Hay, L. L. (1984). *You Can Heal Your Life*. Carlsbad, CA: Hay House.
- Heorhiadi, A., & Conbere, J. P. (2008). Energetics and OD. *OD Practitioner, (40)*1, 36-39.
- Horrigan, B. J., & Horrigan, D. J. (2007). A conspiracy of miracles: Qi, spirit-mind-body, and the transformation of healthcare. *Explore, 3*(1), 47-54.
- Hoyrup, S. (2004). Reflection as a core process in organisational learning. *The Journal of Workplace Learning, 16*(8), 442-454.



- Jamieson, D. W., Auron, M., & Shechtman, D. (2010). Managing use of self for masterful professional practice. *OD Practitioner*, 42(3), 4-11.
- Jordan, J., Mullen, E., & Murnighan, J. K. (2011). Striving for the moral self: The effects of recalling past moral actions on future moral behavior. *Personality and Social Psychology Bulletin*, 37(5), 701-713.
- Karakas, F. (2009). New paradigms in organization development: Positivity, spirituality, and complexity. *Organization Development Journal*, 27(1), 11-26.
- Keating, C., Robinson, T., & Clemson, B. (1996). Reflective inquiry: A method for organizational learning. *The Learning Organization*, 3(4), 35-43.
- Kim, D. H. (1993). The link between individual and organizational learning. *Sloan Management Review*, 35(1), 37-58.
- Korth, S. J. (2000). Single and double-loop learning: Exploring potential influence of cognitive style. *Organizational Development Journal*, 18(3), 87-98.
- Kotter, J. P. (2005). Change leadership. *Leadership Excellence*, 22(12), 3-4.
- Lipshitz, R., Popper, M., & Friedman, V. J. (2002). A multifacet model of organizational learning. *The Journal of Applied Behavioral Science*, 38(1), 78-98.
- Lynham, S. A. (2002). Quantitative research and theory building: Dubin's method. *Advances in Developing Human Resources*, 4(3), 242-276.
- Marquardt, M. J., & Kearsley, G. (1999). *Technology-based learning: Maximizing human performance and corporate success*. Boston, MA: St. Lucie Press.
- McCormick, D., & White, J. (2000). Using one's self-as-instrument for diagnosis. *Organization Development Journal*, 18(3), 49-61.
- McMillan, J. H. (2008). *Educational research: Fundamentals for the consumer*. Boston, MA:

Pearson Education, Inc.

- McTaggart, L. (2007). *The Intention Experiment*. New York, NY: Simon & Schuster.
- Mezirow, J. (2000). *Learning as transformation*. San Francisco, CA: Jossey-Bass.
- Mirvis, P. H. (1996). Historical foundations of organizational learning. *Journal of Organizational Change Management*, 9(1), 13-31.
- Nagendra, H. (2009). Beyond quantum physics. *International Journal of Yoga*, 2(1), 1.
- O'Neil, J., & Grady, H., & Ward, R. (2008). Action learning: Using reflection for learning, development, and performance improvement. *OD Practitioner*, 40(3), 13-18.
- O'Neil, J., & Marsick, V. J. (1994). Becoming critically reflective through action reflection learning. *New Directions for Adult and Continuing Education*, 63(17).
- Organizational Development Network. (2012). <http://www.odnetwork.org/>
- Oschman, J.L. (2000). The electromagnetic environment: Implications for bodywork part I environmental energies. *Journal of Bodywork and Movement Therapies*, 4(1), 56-67.
- Oschman, J.L. (2000). The electromagnetic environment: Implications for bodywork part II Biological effects. *Journal of Bodywork and Movement Therapies*, 4(2), 137-150.
- Oschman, J. L. (2003). Letter to the editor. *Journal of Bodywork and Movement Therapies*, 7(1), 63-65.
- Oschman, J. L. (2008). Perspective: Assume a spherical cow: The role of free or mobile electrons in bodywork, energetic and movement therapies. *Journal of Bodywork and Movement Therapies*, 12(1), 40-57.
- Oschman, J. L. (2009). Charge transfer in the living matrix. *Journal of Bodywork and Movement Therapies*, 13(1), 215-228.
- Oschman, J. L. (2010). Our place in nature: Reconnecting with the earth. *The Journal of*

- Alternative and Complementary Medicine*, 16(3), 225-226.
- Pedler, M., Burgoyne, J., & Boydell, T. (1991). *The learning company: A strategy for sustainable development*, 2<sup>nd</sup> ed. London, England: McGraw-Hill.
- Reynolds, M. (1998). Reflection and critical reflection in management learning. *Management Learning*, 29(2), 183-200.
- Rigg, C. & Trehan, K. (2008). Critical reflection in the workplace: Is it just too difficult. *Journal of European Industrial Training*, 32(5), 374-384.
- Riley, K. (2006). The Butterfly Effect. *Business Communication Quarterly*, 69(4), 369-373.
- Romme, A. G. L., & Van Witteloostuijn, A. (1999). Circular organization and triple loop learning. *Journal of Organizational Change*, 12(5), 439-453.
- Schein, E. H. (1988). *Process consultation volume I: Its role in organization development*. Reading, MA: Addison-Wesley.
- Schein, E. H. (1996). Three cultures of management: They key to organizational learning. *Sloan Management Review*, 38(1), 9-20.
- Schön, D.A. (1983). *The reflective practitioner*. New York: Basic Books.
- Schön, D.A. (1987). *Educating the reflective practitioner*. San Francisco: Jossey-Bass.
- Schuiuma, G., & Mason, S., & Kennerley, M. (2007). Assessing energy within organizations. *Measuring Business Excellence*, 11(3), 69-78.
- Senge, P. M. (1990). *The Fifth Discipline: The art and practice of the learning organization*. London, England: Century Business.
- Shelton, C. K., & Darling, J. R. (2001). The quantum skills model in management: A new paradigm to enhance effective leadership. *Leadership & Organization Development Journal*, 22(6), 264-273.

- Smith, K. (1990). On using the self-as-instrument: Lessons from a facilitators experience. In J. Gillette & M. McColum (Eds.), *Groups in context: A new perspective on group dynamics*. Reading, MA: Addison-Wesley.
- Snell, R., & Chack, A. M. (1998). The learning organization: Learning and empowerment for whom? *Management Learning*, 29(3), 337-364.
- Spoth, J. (2006). Working with energy in organizations. In B. B. Jones & M. Brazzel (Eds.), *The NTL handbook of organization development and change* (pp. 424-439). San Francisco, CA: Pfeiffer.
- Starkey, K. (1998). What can we learn from the learning organization? *Human Relations*, 51, 531-546.
- Strinivasan, T. (2010). Energy medicine. *International Journal of Yoga*, 3(1), 1.
- Taylor, C. (2011). Literature, moral reflection and ambiguity. *Philosophy*, 86(1), 75-93.
- Taylor, F. W. (1911). *The Principles of Scientific Management*, New York, NY, USA
- Taylor, S. S. (2008). Theatrical performance as unfreezing ties that bind at the academy of management. *Journal of Management Inquiry*, 17(4), 398.
- Taylor-Piliae, R. E., & Haskell, W. L., & Waters, C. M., & Froelicher, E. S. (2006). Change in perceived psychosocial status following a 12-week Tai Chi exercise program. *Journal of Advanced Nursing*, 54(3), 313-329.
- The Arbinger Institute. (2002). *Leadership and self-deception: Getting out of the box*. San Francisco, CA: Berrett-Koehler.
- Thogersen, J. (2008). Social norms and cooperation in real-life social dilemmas. *Journal of Economic Psychology*, 29, 458-472.
- Tiller, W. A. (1993). What are subtle energies? *Journal of Scientific Exploration*, 7(3), 293-304.

- Tiller, W. A. (2004). A personal perspective on energies in future energy medicine. *The Journal of Alternative and Complementary Medicine*, 10(5), 867-877.
- Watkins, K., & Marsick, V. (1993). *Sculpting the learning organization: Lessons for the learning organization*. San Francisco, CA: Jossey-Bass.
- Wilber, K. (2005). Toward a comprehensive theory of subtle energies. *Explore*, 1(4), 252-270.
- Wilhelm, W. (2006). Learning organizations: What do they really do? *Leadership Excellence*, 23(3), 17-18.
- Wilson, L., & Wilson, H. (1998). *Play to win: Choosing growth over fear in work and life*. Austin, TX: Bard Press.
- Yeo, R. K. (2005). Revisiting the roots of learning organization: A synthesis of the learning organization literature. *The Learning Organization*, 12(4), 368-382
- Yeo, R. K. (2008). How does learning (not) take place in problem-based learning activities in workplace contexts? *Human Resource Development International*, 11(3), 317-330.
- Yin, R. K. (1992). The case study method as a tool for doing evaluation. *Current Sociology*, 40(1), 121-137.
- Yin, R. K. (1993). *Applications of case study research*. Thousand Oaks, CA; SAGE Publications, Inc.
- Yin, R. K. (2009). *Case study research: Design and methods*. Thousand Oaks, CA: SAGE Publications, Inc.
- Zimmerman, A. Z. (2009). Conflict in common-sense moral psychology. *Utilitas*, 21(4), 401-423.

*Appendix A*

## Email Recruitment Letter to Energetic Institute Graduates

April 13, 2012

Dear Energetics Institute Graduate,

My name is Kelly La Venture and I am a doctoral student at the University of St. Thomas. Research for my dissertation has begun, and I would like to invite you to participate in *How the Discipline of Energetics Fosters Double-Loop Learning: Lessons from Multiple Positivistic Case Studies*.

This study will attempt to prove that the discipline of Energetics fosters double-loop learning.

If you agree to be a participant in this study, you will be asked to participate in a sixty-minute interview. Participation in the study is completely voluntary. There are no financial benefits. I would sincerely appreciate your consideration to participate.

The identity of all participants will be kept confidential; information that is collected as a part of the study will be confidential and will be used in a manner that protects your privacy and identity. In my dissertation and in any follow-up reports that I publish, I will not include information that will make it possible to identify you in any way.

Please consider participating in this study. The next step is to simply contact me at [lave4639@stthomas.edu](mailto:lave4639@stthomas.edu). If you elect to participate in an interview or focus group, we will talk further by email or telephone about consent forms and setting up convenient times to meet (in-person, by phone, or Skype). If you have questions about the study or your participation, please contact me.

Thank you for considering this request; I look forward to your participation in this study.

Sincerely,

Kelly La Venture  
Doctoral Candidate  
University of St. Thomas  
Lave4639@stthomas.edu

*Appendix B*

Informed Consent Form

INFORMED CONSENT FORM  
UNIVERSITY OF ST. THOMAS

HOW THE DISCIPLINE OF ENERGETICS FOSTERS DOUBLE-LOOP LEARNING:  
LESSONS FROM MULTIPLE POSITIVISTIC CASE STUDIES  
[(IRB#XXXXXX)]

Dear Participant:

You are invited to participate in a research study that will attempt to prove *How the Discipline of Energetics Fosters Double-Loop Learning: Lessons from Multiple Positivistic Case Studies*.

You are eligible to participate in this study because you are a graduate of the Energetics Institute in good standing. You can decide not to participate.

The following information is provided in order to help you make an informed decision whether or not you would like to participate. If you have questions please do not hesitate to ask. Kelly La Venture, Doctoral Candidate of Organization Development, University of St. Thomas, is conducting the study. My research advisor is Dr. Alla Heorhiadi, Professor in the College of Applied Professional Studies, University of St. Thomas.

**Project:** *How the Discipline of Energetics Fosters Double-Loop Learning: Lessons from Multiple Positivistic Case Studies*.

**Purpose of the Project:** This study will attempt to prove that the discipline of Energetics fosters double-loop learning.

**Procedures:** If you agree to be a participant in this study, you will be asked to do the following: (a) Participate in an interview or focus group of 60 minutes. (b) Allow the interview to be audio recorded. (c) Allow the researcher to take written notes during the interview.

**Risks and Benefits of Participating in the Study:** The study has some potential risks. Information will be gathered about your perspectives regarding Energetics. Your answers will be kept confidential and you will be given a pseudonym to protect your identity. All data will be kept confidential and secure in locked file cabinets or a password protected data file. In the event that a transcriber is employed, she will be asked to sign a confidentiality agreement.

**Confidentiality:** The records of this study will be kept private. I will not share the information that I collect with you, nor anyone else. In any sort of report or article that I publish, I will not include information that will make it possible to identify you in any way. Audiotapes or printed copies of transcriptions will be kept in a locked file cabinet in my home. Voice recordings will be erased and/or destroyed within one month of the end of my study when my dissertation is

approved for publication, which is anticipated to be August 2012. Electronic copies of the transcription will be saved on a password-protected personal computer. Your identity will be protected by use of a code known only to myself. All materials will be destroyed following the completion of my successful doctoral dissertation.

**Compensation:** There is no financial compensation for participating in this study.

**Opportunity to Ask Questions:** You may ask questions concerning this research and have those questions answered before agreeing to participate or during the study. Or you may call Kelly La Venture at any time, (715) 302.2670 or email [lave4639@stthomas.edu](mailto:lave4639@stthomas.edu) or Dr. Alla Heorhiadi at (651) 962-4457 or [aheorhiadi@stthomas.edu](mailto:aheorhiadi@stthomas.edu). If you have questions about your rights as a research participant that have not been answered by the investigator or report any concerns about the study, you may contact the University of St. Thomas Institutional Review Board.

**Freedom to Withdraw:** You are free to decide not to enroll in this study or to withdraw at any time without adversely affecting their or your relationship with the investigator or with the University of St. Thomas. Your decision will not result in any loss of benefits to which you are otherwise entitled.

**Consent:** If you wish to participate in this study, you will be interviewed.

You are voluntarily making a decision whether or not to participate in this research study. Your signature certifies that you have decided to participate having read and understood the information presented. You will be given a copy of this consent form to keep.

\_\_\_\_\_  
Signature of Participant

\_\_\_\_\_  
Date

I hereby give consent to audio record my interview.

\_\_\_\_\_  
Signature of Participant

\_\_\_\_\_  
Date

In my judgment I am voluntary and knowingly giving informed consent and possess the legal capacity to give informed consent to participate in this research study.

\_\_\_\_\_  
Signature of Participant

\_\_\_\_\_  
Date



*Appendix C*

## Interview Protocol

**Process included the following:**

1. Thanked the graduate for participating in the research study.
2. Reviewed the focus of the study: How the Discipline of Energetics Fosters Double-Loop Learning: Lessons from Multiple Positivistic Case Studies.
3. Explained the recording technology, reason for recording (efficiency in capturing information) and reiterated the confidentiality plan.
4. Reviewed the consent form, asked for questions, asked for audio recording, and verified signatures on consent form.
5. Asked the questions.
6. Thanked the participant, asked if there were additional information, which they would like to share, and explained the approximate timeframe for the publication of the dissertation.
7. Informed them of voluntary withdraw at any time during interview, and if elected to withdraw, nothing from interview was to be used.
8. Confidentiality means that I did not share your responses with anyone else.

**Open-ended questions**

1. Please describe how you reflect critically on your own behavior when you face a problem at work.
2. Thinking about how you solve problems at work, please describe your ability to identify your values and assumptions that led to your behavior.  
Probe: how did taking Energetics change our ability to identify your values and assumptions?
3. Please describe how during workplace problem solving you are able to change your values or assumptions if you discovered that these led to behaviors that were part of what created the problem.  
Probe: how did taking Energetics change your values and assumptions?

4. Please describe how during workplace problem solving you were able to change your behaviors after you discovered that these were part of what created the problem.  
Probe: how did taking Energetics change your ability to change your behaviors?

**Likert questions:**

- 1 = Strongly disagree  
2 = Disagree  
3 = Neither agree nor disagree  
4 = Agree  
5 = Strongly agree

- 1a. I was able to reflect critically on my behavior before completing the Energetics courses.

1      2      3      4      5

- 1b. I was able to reflect critically on my behavior after completing the Energetics courses.

1      2      3      4      5

- 2a. Before taking Energetics, during workplace problem solving, I was able to identify the values and assumptions that led to my behavior.

1      2      3      4      5

- 2b. After taking Energetics, during workplace problem solving, I was able to identify the values and assumptions that leads to my behavior.

1      2      3      4      5

- 3a. Before taking Energetics, during workplace problem solving, I was able to change the values and assumptions that led to my behavior.

1      2      3      4      5

- 3b. After taking Energetics, during workplace problem solving, I am able to change the values and assumptions that leads to my behavior.

1      2      3      4      5

- 4a. Before taking Energetics, during workplace problem solving, I was able to change my behaviors that contributed to the problem.

1      2      3      4      5

4b. After taking Energetics, during workplace problem solving, I was able to change my behaviors that contribute to the problem.

1      2      3      4      5