



STAGES International  
UNFOLDING THE LIVING MAP OF LIFE



# Frontiers of Consciousness:

## UNFOLDING FOUR METAWARE STAGES

Course Manual

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# Introduction

Via common sense and daily experience, we know that humans continue to learn, grow and develop onwards from birth. There is also ample documentation in support of the developmental spectrum included in many models, all of which can support maturity. Simply knowing about the different developmental levels can support our growth through our own developmental continuum, and consequently this can be a deep support to our personal growth.

The STAGES Matrix has been developed through rigorous study and research over the past ten years and can aid in the progression of professional skills and knowledge as well as personal development. It is an articulation of repeating parameters, which makes up the levels of development. Using these repeating patterns, we can reach back into the past of personal, professional and systems development and see how the elements repeat at later times but with greater maturity. One can look at the patterns both in individual and group life, and see how we can heal the immature patterns and grow the beneficial ones.

It is important to note, that one stage isn't better than another, and that each stage is part of normal development. The purpose of this work is to define the stages and then discover through the assessment process, where you measure personally, and professionally. Most people will cover a range of levels, because we all have that range within us. As you go through the stage descriptions, think about how the various attributes map onto you or if you recognize those behaviors and qualities in others.

While one stage isn't better than another, it is helpful to know where you are on a developmental map, so you can navigate troublesome territory including your foray into a new stage, troubles you may have with old patterns and how you may gain appropriate skills for the level of development you most often access.

There is also growing interest in using the knowledge of development for professional areas, such as coaching, psychotherapy, business, education and more. The STAGES model can also serve as a sturdy framework on which to cultivate varied organizational and professional lives. Business and educational aspirations and the professionals that engage with these systems can benefit from understanding this universal growth process, and how this can support personal and organizational health.

Following is an explanation of the STAGES Matrix from the earliest 1.0 level, through the latest 6.5 level. This manual will give you an overview of how the STAGES Matrix reveals one way of looking at these and other areas and give you a good background for further depth.

## Development: The Spectrum of Compassion

Loevinger's 1976 ego development system is built on the work of Erik Erickson, and based on research using her Washington University Sentence Completion Test. Susanne Cook-Greuter then refined the sentence-completion test instrument as well as the level descriptions, adding the distinction of perspectives and two later level stages to Loevinger's work. In the STAGES model, Terri O'Fallon has since embedded perspectives into a new scoring system, developing underlying repeating parameters, and adding two additional later-level STAGES. The addition of parameters allows us to predict more accurately how emerging later-level STAGES might look.

Loevinger	Cook-Greuter	O'Fallon
Unified Tier 4		(Unified Stages)
MetAware Tier 3	6th	6.5 Illumined
		6.0 Universal
	5th	5.5 Transpersonal
		5.0 Construct Aware
Subtle Tier 2	4th	4.5 Strategist
		4.0 Pluralist
	3rd	3.5 Achiever
		3.0 Expert
Concrete Tier 1	2nd	2.5 Conformist
		2.0 Rule Oriented
	1st	1.5 Egocentric
		1.0 Impulsive

STAGES Developmental Levels: A Lineage

# A Bit about Perspective Taking

This diagram shows the trajectory of the developmental person-perspectives. On this diagram, each person-perspective has two stage levels: an early-entry level, and a late-exit level. People taking early-entry perspectives are learning the contours of the new perspective; the perspective is just occurring to them or happening to them. Robert Kegan says they are “had by” their perspective.

People mature from the early perspective to the late perspective, where they now “have” the perspective, and find it easy to use it as a tool. *It is no longer happening to them, but rather, they are using the perspective.*

The first Tier, is the Concrete Tier. It has two person-perspectives, the first-person perspective and the second-person perspective, with early and late manifestations of each perspective. The third- and fourth-person Subtle perspectives form the second Subtle Tier, with an early level and a late level for each of those perspectives. Likewise, MetAware fifth and sixth person-perspectives form the MetAware Tier, each of which have two stages, an early and a late one.

The STAGES Matrix diagram below responds to three questions which, when answered, give us the definition of the person-perspectives. The first question asks what Tier the perspective is in. The choices are Concrete, Subtle and MetAware (aware of awareness). The second question asks about the Social Preference. When this question is responded to we know if they prefer an Individual orientation or a Collective one. The third question asks where they are in the Learning Sequence: Receptive, Active, Reciprocal, Interpenetrative.

The responses to these three questions give us the definition of the various person-perspectives, which combines the responses to the three questions. These parameters are unique for each person-perspective

The following diagram reveals the nuances unique to the STAGES Model of human development, beginning with the first four human stages represented in the Concrete Tier.



# The STAGES Matrix & the Three Questions

Question 1: Is the object of awareness Concrete, Subtle, or MetAware?		Question 2: Is the experience Individual or Collective?		Question 3: Is the experience Receptive, Active, Reciprocal, or Interpenetrative?		
PP	TIER	SOCIAL PREFERENCE		LEARNING SEQUENCE		STAGE NAME
1.0	Concrete	Individual	Receptive	1.0 Impulsive		
1.5	Concrete	Individual	Active	1.5 Egocentric		
2.0	Concrete	Collective	Reciprocal	2.0 Rule Oriented		
2.5	Concrete	Collective	Interpenetrative	2.5 Conformist		
3.0	Subtle	Individual	Receptive	3.0 Expert		
3.5	Subtle	Individual	Active	3.5 Achiever		
4.0	Subtle	Collective	Reciprocal	4.0 Pluralist		
4.5	Subtle	Collective	Interpenetrative	4.5 Strategist		
5.0	MetAware	Individual	Receptive	5.0 Construct Aware		
5.5	MetAware	Individual	Active	5.5 Transpersonal		
6.0	MetAware	Collective	Reciprocal	6.0 Universal		
6.5	MetAware	Collective	Interpenetrative	6.5 Illumined		

The STAGES Matrix & the Three Questions

## Concrete Stages:

*1.0 Impulsive, 1.5 Egocentric. 2.0 Rule-Oriented, 2.5 Conformist*

Question 1: Is the object of awareness Concrete, Subtle, or MetAware?		Question 2: Is the experience Individual or Collective?		Question 3: Is the experience Receptive, Active, Reciprocal, or Interpenetrative?	
PP	TIER	SOCIAL PREFERENCE		LEARNING SEQUENCE	STAGE NAME
1.0	Concrete	Individual		Receptive	1.0 Impulsive
1.5	Concrete	Individual		Active	1.5 Egocentric
2.0	Concrete	Collective		Reciprocal	2.0 Rule Oriented
2.5	Concrete	Collective		Interpenetrative	2.5 Conformist



## STAGE Description: 1.0 - Impulsive

*Early First Person-perspective - Concrete | Individual | Receptive*

In the Concrete Tier, people focus on Concrete objects: what they do, see, hear, and touch, and Concrete objects that they have or want, such as car, family, marriage etc.

<b>Question 1:</b> Is the object of awareness Concrete, Subtle, or MetAware?		<b>Question 2:</b> Is the experience Individual or Collective?		<b>Question 3:</b> Is the experience Receptive, Active, Reciprocal, or Interpenetrative?	
PP	TIER	SOCIAL PREFERENCE		LEARNING SEQUENCE	STAGE NAME
1.0	Concrete	Individual		Receptive	1.0 Impulsive

1.0-Impulsive: Early First Person-perspective - Concrete | Individual | Receptive

A Concrete Individual is a flesh and blood human; the Concrete Collective is a Collective you can put a fence (Concrete boundary) around; the Concrete exterior relates to Concrete actions and Concrete physical development, such as brain development; and the Concrete interior relates to emotions you can see on the outside such as mad, sad, glad, etc., or related to rules (guilt or shame as evidenced by feeling bad about breaking a rule, hurting someone, or damaging something. ).

The basis of the repeating patterns arise in this Concrete Tier, so it is critical to recognize them for they repeat over and over.

This stage is the generally oceanic stage of experience that babies are born into. They are inside of their Individual experience of the gradual awakening of their Concrete self identity and their interior emotions: sad, glad mad, surprise, and startle.

While for the most part, babies take this 1.0 perspective, we also have adults at this level. These Individuals can include people with developmental disabilities, brain injury, or dementia, such as

Alzheimer's disease. Consequently, people can grow up from this stage, remain in this stage due to birth circumstances, and grow down into it, due to brain injury or disease.

In the 1.0 stage, Individuals:

- Learn from repeating and copying in speech and in action (echolalia)
- See Concretely from their own perspective
- Think everyone sees exactly what "they" see physically
- Are learning the contours of their physical body
- Impulsive adults are generally developmentally disabled or have had a regressive disease, but some of them still can contribute under supervision.

## Psychosocial Description: 1.0 - Impulsive

*Early First Person-perspective - Concrete / Individual / Receptive*

At 1.0, when children first enter this world, they are helpless. Their core challenge in the face of this helplessness, is to be able to develop basic trust that their core Concrete needs will be taken care of.

With basic trust, children will be able to bond to their parent(s). Bonding, or healthy attachment, is the primary task for this stage. The key parental task at this point is to provide a safe, loving and engaged environment for the child.

The child must feel safe enough that they can receive this world through their sense of sight, sound, touch, taste, smell and movement without experiencing fear. They must engage sufficiently through the senses, so they can bond to someone. This requires contact from the parents that is present, consistent, and sustained. If there is minimal presence, we create an unattached child. If contact is inconsistent, the attachment becomes anxious attachment, if it is not sustained we set up the child for insecure attachment and if strangers make more connections with the child than the parent, the child may develop indiscriminate attachment. By providing sustained presence, and consistency, parents can help the child develop healthy bonding.

## STAGE Description: 1.5 - Egocentric

*Late First Person-perspective - Concrete | Individual | Active*

Individuals at this level mature their first-person perspective. They now understand that they have a body that is theirs, and they identify with that body as “me”. However, they still can only see from their own Individual view, so often can be very confused about what is “mine” and “yours.” When they take something away from another person, they tend to have no remorse for the feelings of the other person because everything seems as if it is “mine.” If everything is there for the taking, and seems like “mine,” why the need for remorse?

Question 1: Is the object of awareness Concrete, Subtle, or MetAware?		Question 2: Is the experience Individual or Collective?		Question 3: Is the experience Receptive, Active, Reciprocal, or Interpenetrative?		
PP	TIER	SOCIAL PREFERENCE		LEARNING SEQUENCE		STAGE NAME
1.0	Concrete	Individual		Receptive		1.0 Impulsive
1.5	Concrete	Individual		Active		1.5 Egocentric

1.5 Egocentric: Late First Person-perspective - Concrete | Individual | Active

This stage focuses on the Individual rather than the Collective, so they can't easily see that others have experiences just like they do because their experience is still “all about me.” Their interior senses are still quite immature, so they can't easily predict (visualize) consequences for their behavior, nor learn from (visualize) their past.

However, adults at 1.5 have many more years of experience than children at 1.5, and have built an adequate vocabulary, so they are much more agile in life than children are. In the moment, they can see things coming and be quite cunning in their entrained responses. Individuals at this level tend to have these qualities:

- Concrete either/or choices and one-way seeing; “my” and “mine” in Concrete vocabulary.
- Either/or choices and one-way seeing; “my” and “mine” in Concrete vocabulary.
- Have their own Concrete thoughts, feelings, wants.
- Reliance on external senses. Hyper-vigilance allows for Concrete intuitive manipulation.
- Narrow first person view: Others see (only) what s/he sees; it appears to others that they “lie”. They may not know what “lying” is.
- They don’t know that others can see them in return.
- Action oriented: choices focus on having and keeping what you want.
- Fight/flight/freeze: so they don’t get caught breaking the rules.
- Feedback is interpreted as an attack (they can’t take a perspective on themselves or others).
- Can’t experience the consequences of their actions on others, so they feel no guilt or remorse for others. They only regret behaviors that cause them trouble. They don’t yet experience reciprocity so:
  - Their view is “It’s your fault/problem.”
  - May appear dominating or coercive; from their view, they get what they want and take what is already “theirs”.
  - Live parallel lives with others: talking “at” and not “with”.
  - Can’t remember (visualize, inner hearing) the past, so they don’t learn from mistakes.
  - Can’t see into the future, so can’t imagine consequences.
  - They pair events, which supports magical thinking and luck e.g., a lucky penny.
  - Ordinarily a childhood stage (“the terrible twos”) but compromised adults live here as well.
  - Can have a normal, or even high level of intelligence.

## Psychosocial Description: 1.5 - Egocentric

*Late First Person-perspective - Concrete / Individual / Active*

Children at 1.5 are exploring their Individual power in the world. They explore this power in 4 categories:

- Physical
- Intellectual
- Emotional
- Social

Each Category of power can have destructive and generative elements. Children at this developmental level are pre-social but do have personal power. As a result, they will disregard social boundaries because they don't see these social boundaries. As a result, it is common for them to incidentally harm themselves (running into traffic), harm others (hitting others on the head with a toy), or harm the environment (breaking things).

The challenge for parents, is to hold a solid, safe container for the child's exploration of power in the world. This container must make it safe for the child, for others around the child, and for the overall environment, within which the child is acting out their power. Children can then safely explore all the delightful aspects of their power. This includes all the spontaneous delightful things children do, like singing, dancing, hugging,

The exploration of personal power includes five steps of empowerment:

1. Autonomy: the recognition that I have the individual ability to have choice.
2. Initiative: the capacity to take the first step to act on that choice.
3. Follow-through: the capacity to sustain the effort to make it through the trials that often get in the way.
4. Completion: the ability to actually complete the project too finish and say "this is done."
5. Celebration: the ability to rejoice in the completion of the task.



## STAGE Description: 2.0 - Rule Oriented

*Early Second Person-perspective - Concrete | Collective | Reciprocal*

Individuals at this first Collective stage make the leap from “it’s all about me” to “I see you see me” and “You are like me on the outside!” Reciprocity is born, moving from parallel play and “talking at” to “talking with.”

Question 1: Is the object of awareness Concrete, Subtle, or MetAware?				Question 2: Is the experience Individual or Collective?				Question 3: Is the experience Receptive, Active, Reciprocal, or Interpenetrative?					
PP		TIER		SOCIAL PREFERENCE				LEARNING SEQUENCE				STAGE NAME	
1.0			Concrete			Individual					Receptive		1.0 Impulsive
1.5			Concrete			Individual					Active		1.5 Egocentric
2.0			Concrete			Collective					Reciprocal		2.0 Rule Oriented

2.0-Rule Oriented: Early Second Person-perspective - Concrete | Collective | Reciprocal

At this stage, individuals learn from trial and error, inductive, experiential process, and develop an ability to do simple Concrete ordering, with the concept of fairness. Relativity of Concrete objects is understood (different shapes have the same area; two different shaped cups can hold the same amount of water). This supports an understanding of equality, fairness, and a desire to not be different from the others around them. Now they want to look like, and behave like the other people in their lives, even though some exteriors may be different.

They may often forget things, however, because their interior senses of visualization, inner auditory, and emotions are just developing. There is a developing memory of the past, for they can now remember in their “mind’s eye” what happened earlier, and hear the words of authority figures internally. This gives them the capacity to learn from their mistakes and not repeat events, which had undesired consequences.

They also begin to learn that rules keep them safe, so they can receive them from others in authority, (introjecting them.) The most difficult part for them is remembering the rules, because this aspect of their internal auditory capacities is still developing.

Their capacity to prioritize these rules, however, is limited. For example, they can easily ascribe the same punishment for a minor offense as a major one. They manage well if they have enough structure around them, and adults at this stage are greatly supported by many of our fundamentalist churches, which help them remember ethical rules and, in general, goodness. These structures serve to keep them happy and prevent them from the kind of trouble they likely encountered as an adult, at the 1.5 stage:

Main Focus: immediate needs.

- I can see you seeing me, so shyness and bashfulness often arise here.
- Both/and – “you-and-me”: Concrete reciprocity.
- Reciprocity goes two ways now: “If I hurt you, you can hurt me back.”
- You know that others can see/know things you can’t/don’t.
- Motivation: to learn what others see, you need to communicate “with.”
- Having friends.
- Beginning sense of trust.
- We can love and care for each other.
- I can learn from, and with you (beginning of rule orientation/agreements).
- Feedback: beginning of comparisons, self to other, other to self.
- New role for communication”: Talking “with” as well as “at” (both/and).
- Can’t prioritize well, so all deeds may be punished or rewarded equally.
- Fairness: one for you and one for me.

## Psychosocial Description: 2.0 - Rule Oriented

### *Early Second Person-perspective - Concrete / Collective / Reciprocal*

At around 4 to 6 years-old, children transition from a first-person perspective (everything is about me) to a second-person (“we” matters). They mature in this perspective up to, approximately, 12-14 years of age. Their challenge is to learn the basics of prosocial behavior. They learn the social skills necessary to navigate the ever increasingly complex human social world.

The foundation of pro-social skills is reciprocity. Reciprocity requires the capacity to manage presenting our self and accepting the presentation of others. All the prosocial skills spring from understanding reciprocity. Rules and roles emerge. They monitor fairness and take turns. They embrace leadership, “follower-ship,” cooperation and competition, and they learn to:

- Manage intimacy and establish boundaries
- Progress in relationship through bringing in new experiences
- Maintain a relationship by having good routines
- How to repair a relationship through feedback, acknowledgment, apologizing, atonement and making changes so they don’t cause that harm again.

At 1.5, Egocentric, children often co-opt the language of 2.0 Rule Oriented to get control. At the 2.0 Rule Oriented level they will self-adjust and be nice when someone tells them “you are not being nice”. With others at the 2.0 stage, this works well, but with someone at 1.5 Egocentric, the focus is to get what they want. They will co-opt the language of 2.0 (i.e. talk about being nice) but will not hold themselves accountable to be nice. At 2.0, they do hold themselves to that same expectation of “being nice” or “taking turns”. Behavior can be a more accurate indicator at 1.5, than language is.

When someone breaks a rule of “not being nice,” then others at 2.0 may call them out on it. “You’re not being nice,” they say. Then the child may feel attacked by the group, which is “not being nice” to them. But if Concrete bullies are allowed to dominate the playground, the beauty of 2.0 friendship sharing and caring gets destroyed by the 1.5 bully. Learning to defend themselves and others when people aren’t, being nice is a critical part of the 2.0 process.

The parents' challenge is to provide the social exposure for children to explore their social self. The balance parents must navigate, is to provide social experiences with enough freedom that the 1.5 Egocentric can explore their own social skills and enough boundaries that they don't intrude on the 2.0 Rule Oriented boundaries. Children at this stage are particularly vulnerable to peer pressure, so managing the social environment is important. However, over-controlling the exchanges within this environment also limits their social growth. This balance between managing the social environment and providing the necessary freedom for the child at this stage to discover their own social self, needs systematic adjustment as our child grows from 6 to around 14 years old. Finding and adjusting the balance between these two poles, is the art of parenting during this stage of development.

## STAGE Description: 2.5 - Conformist

*Late Second Person-perspective - Concrete | Collective | Interpenetrative*

From knowing the difference between a major infraction and minor one, individuals at this stage begin to prioritize rules. Preserving one's status and approval as a group member is realized by following rules and social norms and avoiding major, or minor, rule violations. This is because tension in relationships is experienced as a threat in that one is either "in", or "out" of a group accordingly.

Question 1:

Is the object of awareness  
Concrete, Subtle,  
or MetAware?

Question 2:

Is the experience  
Individual or  
Collective?

Question 3:

Is the experience  
Receptive, Active,  
Reciprocal, or  
Interpenetrative?

PP	TIER	SOCIAL PREFERENCE	LEARNING SEQUENCE	STAGE NAME
1.0	Concrete	Individual	Receptive	1.0 Impulsive
1.5	Concrete	Individual	Active	1.5 Egocentric
2.0	Concrete	Collective	Reciprocal	2.0 Rule Oriented
2.5	Concrete	Collective	Interpenetrative	2.5 Conformist

2.5 Conformist: Late Second Person-perspective - Concrete | Collective | Interpenetrative

Interpenetration supports Conformists to become excessively agreeable; they find it difficult to criticize or reprimand those outside of their immediate circle. They protect the accepted norms, avoid rocking the boat, and defend the group as well as themselves from any outside influences or attacks that might upset the oneness with the group. Thus, they collectivise any previous Individual experiences to the group, so they tend to not question authority, and accept group norms, rules, policy and ideas without examination because such questioning would be felt as Individualistic. Thus, they keep doing what they do well, but they feel uncomfortable when they are found wanting in any way by anyone, for their primary focus is to Interpenetrate with their group.

Much of the Conformist focus is to make a positive impression and if need be, to save face. This requires loyalty to the group. Conformists also appreciate status symbols, badges, appreciation certificates, etc.,



and money as symbols of fitting into their group. As well, a Conformist will tend to feel that policy, rules and norms prescribe every possible action, and that there is little room for Individual creative risk-taking. They generally will not confront superiors on behalf of anyone else, as they don't want to jeopardize their own standing in the group.

Interpenetration: You are me, and I am you, Concretely.

- I can visualize myself next to you, seeing what you see (I see you see me).
- Main Focus: belonging to own family, group, nation, belief system.
- Hierarchy of rules which contribute to bureaucracy.
- Time frame: today and the past—follows tradition and cannot yet visualize Subtle things they haven't seen, so can't yet project into the future.
- Space: ethnocentric—anyone outside of your identified group threatens the Interpenetrative nature of the group, so they...
- Deflect feedback that threatens loss of face and are unable to give Individual feedback to others.
- Mature interior senses make memory reliable, so they can delay gratification and anticipate consequences like guilt and shame—Collective emotions are motivators.
- Can't question group norms—they follow rules strictly.
- Symbols, status, appearance, material goods, reputation and prestige assures them that they are fitting into the group.
- Committed to routines, order, stability as a means of safety—the “tried and true”, based on the past, which can be known.

## Psychosocial Description: 2.5 - Conformist

*Late Second Person-perspective - Concrete / Collective / Interpenetrative*

At the 2.0 Rule oriented level, children are highly susceptible to peer pressure. As children move into their teen years, they may begin to develop a later second person-perspective. They may move from allowing others to define the rules for them, to adopting underlying principles that define the rules in the first place. At 2.0 Rule Oriented, individuals follow other members of the group, accepting the rules that these members define, even if that leader does not behave according to a previously accepted set of rules.

In contrast, at 2.5 individuals begin to establish principles, which makes them less susceptible to peer pressure, as they have internalized (Interpenetrated) the principles from which their behavior is conducted. This internalization of principles makes their behaviors more stable and solid, creating an internalized foundation for making choices in the world.

It is this internalization of principles, that allows a person to persevere in the face of social pressure to do otherwise. This also allows a person to rebel against tyranny, if the tyranny goes against a core principle. These individuals now follow principles and principled people. People that share core principles are “in-group”. In-group people will tend to look alike, dress alike, act alike, speak alike and feel alike. They will defend each other, even to the death if need be.

This capacity requires one to shift from being “had by” the reciprocal relationship, to being able to observe the dynamic of the reciprocity itself. By doing this, we can see which Reciprocal patterns are “good” and which are “bad”. This is the process of internalizing the principles, the process of Interpenetration.

These principles grow to become more important than the spontaneous exchange with peers. Peer pressure begins to recede behind the power and stability of principles. The parents’ job, is to provide continued exposure to a principled lifestyle which may include theology/philosophy. The balance for a parent at this point, is to provide enough exposure and modeling of a principled lifestyle, without becoming so dogmatic that the child does not feel any freedom for self-development and self-exploration of their own emerging principles.

## Subtle Stages:

*3.0 Expert, 3.5 Achiever, 4.0 Pluralist, 4.5 Strategist*

In this second Tier, individuals focus more on Subtle objects, such as complex thinking and feelings, the future and planning for it, and later classes of Subtle objects such as assumptions, interpretations, judgments etc. They can now take third and fourth person perspectives.

Question 1: Is the object of awareness Concrete, Subtle, or MetAware?		Question 2: Is the experience Individual or Collective?		Question 3: Is the experience Receptive, Active, Reciprocal, or Interpenetrative?	
PP	TIER	SOCIAL PREFERENCE		LEARNING SEQUENCE	STAGE NAME
1.0	Concrete	Individual		Receptive	1.0 Impulsive
1.5	Concrete	Individual		Active	1.5 Egocentric
2.0	Concrete	Collective		Reciprocal	2.0 Rule Oriented
2.5	Concrete	Collective		Interpenetrative	2.5 Conformist
3.0	Subtle	Individual		Receptive	3.0 Expert
3.5	Subtle	Individual		Active	3.5 Achiever
4.0	Subtle	Collective		Reciprocal	4.0 Pluralist
4.5	Subtle	Collective		Interpenetrative	4.5 Strategist

The Subtle poles definitions are as follows:

- Subtle Individual: one's interior self
- Subtle Collective: contexts, including complex adaptive systems
- Subtle Interior: Subtle thinking, feelings, assumptions, judgments etc
- Subtle Exterior: awareness of interior physical body functioning, Subtle energies and systems

## STAGE Description: 3.0 - Expert

*Early Third Person-perspective - Subtle | Individual | Receptive*

The first stage in the Subtle Tier is 3.0 Expert and is a repeat of the 1.0 Impulsive stage but now they are engaged with Subtle objects as well as Concrete ones. This Stage generally begins in early adulthood, when the brain and Subtle senses have developed well enough so that they can begin to visualize things they have never seen before (beginning outcome orientation). The beginning maturity of the Beta brain wave supports a focus on Subtle objects. In contrast to the 2.5 Conformist stage, the 3.0 stage has an Individual focus and rather than coming from a Concrete Collective orientation.

Question 1: Is the object of awareness Concrete, Subtle, or MetAware?		Question 2: Is the experience Individual or Collective?		Question 3: Is the experience Receptive, Active, Reciprocal, or Interpenetrative?	
PP	TIER	SOCIAL PREFERENCE		LEARNING SEQUENCE	STAGE NAME
1.0	Concrete	Individual		Receptive	1.0 Impulsive
1.5	Concrete	Individual		Active	1.5 Egocentric
2.0	Concrete	Collective		Reciprocal	2.0 Rule Oriented
2.5	Concrete	Collective		Interpenetrative	2.5 Conformist
3.0	Subtle	Individual		Receptive	3.0 Expert

3.0 Expert: Early Third Person-perspective - Subtle | Individual | Receptive

This Tier is a Subtle repetition of the Concrete Tier. Thus, the Expert is exploring the contours of a new Individual Subtle self, and rather than echolalia and Concrete copying of the 1.0, they are now looking for Subtle Experts to emulate, and they select people who generally are well known in their field, or command respect.

The 3.0 Expert is very particular in areas where outputs need to be exact, since they can now bring into view, Subtle analysis that goes beyond Concrete operations and reasoning. Thus, these individuals tend

to be quite successful in professions such as engineering, architecture, medicine, dentistry, and accounting, where they can begin to predict Concrete outcomes using Subtle abstractions, such as probabilities. Uniqueness and Individualism is now a focus, so they have a belief in the superiority of their own technical abilities. This kind of focus can take a long time, so work is a central theme. If one doesn't find "the answer", one can look to the expertise that can be found from authoritative sources (manuals, laws, books and authorities in the field). Because of this, 3.0 Experts often seek to attain the perfectionist standards of those who teach them. In contrast, they are critical of unfamiliar ways of handling a situation, because Subtle hierarchies and categorization may be difficult for them. In addition, their Collective sensibilities are still located with the Conformist Collective, and while they do what they can to reform it to Individual standards, conformity still has a strong influence on many of them. Thus, they rely on established explanations and procedures, while they simultaneously defend against having their professional knowledge questioned. Qualities that arise out of these repeating combinations of traits are: they are often excellent in their specialization, are very detail oriented, and take pride in doing their jobs well.

Because of their focus on details, the 3.0 Expert is far more agile with effectiveness and technical prowess than with efficiency. They may work for unnecessary perfection while missing deadlines in service of making something endlessly perfect. This supports the tendency to micromanage in order to make sure things are perfect, and this quality may affect their ability to be a team player. This also makes it difficult for them to prioritize among competing efforts or to grasp the bigger picture.

On the positive side this strong desire to seek improvements and to find perfection plays a vital role in the development of products, techniques and services and handling the day to day running of its affairs.

Still being influenced by the Conformist Collective, the 3.0 Expert resents feedback in general, especially from those not of a higher specialization status than themselves. They are also critical of others in their own field of expertise, with a tendency to overstep boundaries and give unsolicited advice.



A summary of the 3.0 Expert Qualities are below:

- Through learning the contours of their Subtle self, early metacognition arises.
- Can project self into other's shoes and imagine what the other is experiencing beyond what they themselves would experience, if there.
- Orients to the past, present and months into the future, however not likely more than 2-3 years.
- Go beyond Concrete comparisons, to "All humans are human alike on the inside", so human rights begin to appear.
- Being an expert in your craft means the capacity to use Subtle symbols of symbols. This arises out of Concrete reasoning, which matures to the recognition of Subtle objects on the reasoning process.
- They can own their own Subtle ideas but have trouble prioritizing them.
- Sees only one side of an argument (usually theirs) at any given time.
- Can't prioritize the Subtle, so all of one's ideas are valuable—don't throw any of them away.
- If they analyze enough the right answer will appear—thus 110% perfectionism. This sometimes results in analysis paralysis.
- True to their Conformist Collective, they take feedback personally, defend their position, and dismiss feedback from non-experts.
- Entrepreneurial
- Work hard—they tend to take over and/or micromanage.
- Due to perfectionism, not often good team player.

## Psychosocial Description: 3.0 - Expert

*Early Third Person-perspective - Subtle / Individual / Receptive*

At 3.0 Expert, we are exploring our unique self. We begin to realize that for all the conformity at 2.5 Conformist, we cannot completely conform. The result is a feeling of a facade, a mask that we wear in public, when deep down inside we are not exactly that which we present ourselves to be. This cognitive dissonance resolves by moving into the 3.0 Expert level and accepting that, despite all our attempts at perfect conformity, we are on some level a unique, separate, and different human being.

This acceptance provides the freedom to acknowledge to ourselves, that our unique self that is not exactly the conformist self we present in public. This self-acknowledgment begins to provide the freedom to explore our unique emotions, our unique thoughts, our unique passions and impulses. We do not abandon our principles, but we reassess from a new perspective—the perspective of this unique Individual.

Instead of condemning ourselves to a life of guilt over trifles, we now alter some of the principles to allow for our uniqueness and even celebrate them. We may do this by altering our foundational platform (religion, for example) or by discarding it in favor of a different one (perhaps a more open religion or philosophy).

This capacity to see our unique selves, our unique skills, and our unique passions allows us to choose a profession that supports us to be more successful, versus just following a traditional path toward a vocation. As a result, we become technical experts. The need to be perfect in the eyes of God and group, now convert to being perfect in our chosen field (not necessarily a vocation). The energy that was put into perfecting our social conformity now finds a new home in perfecting our unique special skills.

This loosening of the Conformist grip on ourselves can be very unsettling. As a result, to deal with this Subtle existential anxiety, we may rely on expert advice to help guide us through this disorienting time. The expert advice operates like a cradle for the mind. At 1.0 Impulsive we cradle our children Concretely in our arms. At 3.0 Expert we are cradled in the arms of the masters that go before us. This comfort provides the safety and security necessary to trust the new Subtle self being born into this world. In this

safety and security, we can now develop Subtle attachment and Subtle bonding. In this Subtle world that we have no skills to negotiate, there is someone there to guide us and make it all ok. This gives us the freedom to be exposed for who we are.

## STAGE Description: 3.5 - Achiever

*Late Third Person-perspective - Subtle / Individual / Active*

The 3.5 Achiever is an up-shift of the 1.5 Egocentric level with several qualities repeating. First, a kind of Subtle one-way-seeing arises, where the Achiever can see the Subtle in others but aren't as able to see Subtle reciprocity—that is, they don't yet have the awareness that others can see them back, resulting in a form of Subtle one-way-seeing. This prompts them to subtly “talk at” people rather than “with” them and often brings them to a lifestyle of parallel living with others, each doing their own thing, similar to the parallel play of the 1.5 Egocentric level. They also become interested in ownership of Subtle things, such as ideas, brands, copyrights on their writing, patents, and also defend themselves in Subtle ways using lawyers and legal recompense.

Question 1: Is the object of awareness Concrete, Subtle, or MetAware?				Question 2: Is the experience Individual or Collective?				Question 3: Is the experience Receptive, Active, Reciprocal, or Interpenetrative?			
PP		TIER		SOCIAL PREFERENCE		LEARNING SEQUENCE		STAGE NAME			
1.0		Concrete			Individual			Receptive		1.0 Impulsive	
1.5		Concrete			Individual			Active		1.5 Egocentric	
2.0		Concrete			Collective			Reciprocal		2.0 Rule Oriented	
2.5		Concrete			Collective			Interpenetrative		2.5 Conformist	
3.0		Subtle			Individual			Receptive		3.0 Expert	
3.5		Subtle			Individual			Active		3.5 Achiever	

3.5 Achiever: Late third-person perspective - Subtle | Individual | Active

3.5 Achievers are now readily able to visualize the Subtle and to prioritize. This combination supports their one-way drive to goals and outcomes in the future so they are concerned with successful plans and outcomes around achieving their goals further into the future as idealized in the five-year plan.

They welcome feedback, when it supports the achievement of their goals. As well, Achievers believe deeply in linear cause and effect and objective rationality. From their point of view, predictable patterns and laws govern the natural world, including the behavior of people. These can be researched, made explicit and applied to influence and control outcomes. Thus, results are secured by relying on an objective “scientific” approach and by applying one’s personal conviction and energy to refining the knowledge base.

- Subtle either/or choices, for “me”! One-way seeing supports focused attention as a mature state.
- Subtle one way seeing (“It’s about Subtle me”): They can’t see that others can see them subtly. As a result:
- They live parallel lives with those around them. Balancing work, home and play is sometimes difficult, for these activities often require reciprocity.
- Attention and focus is on their own Individual priorities.
- Can project self into other’s shoes and imagine what they will be experiencing.
- The above supports strategic thinking - thinking about thinking and feeling; planning, analysis (metacognitive processes).
- Time frame: multiple years (five years or more) into future which allows for deductive reasoning, and supports:
- Hypothesizing or goal setting.
- Subtle self is fore-grounded—we are all subtly alike: exterior facets of humanity aren’t as critical as the Subtle self, thus social justice on all outside differences appears.
- They can prioritize their Subtle ideas, so effectiveness and efficiency are more important than perfection (80/20 rule).
- Scientific approaches are seen as a magical answer to everything including progress: the perfectibility of humankind through the scientific method.

- Accepts Individual feedback, especially if it helps them to achieve their Individual goals and to improve.
- Values teamwork aiming at achieving their Individual aims.
- Struggles with balancing work, family, play.

## Psychosocial Description: 3.5 - Achiever

*Late Third Person-perspective - Subtle / Individual / Active*

At the 3.5 Achiever level, we arise from the Subtle cradle of the masters into the full power of our own Subtle self. An echo of our 1.5 Egocentric Concrete self, we see all the same issues repeat. While we have mastered Concrete boundaries, now we do not see Subtle boundaries. As a result, we can crash through other's Subtle boundaries completely unaware of the damage of our escapades. We explore our Subtle power using the four categories we learned at the 1.5 Egocentric stage: physical power, intellectual power, emotional power and social power. Now, however, we operate these forms of power in the Subtle field. We learn about body language and how to use that to influence people. We learn about skilled argumentation, to advance our goals. We learn how to master our emotions in a similar vein by learning feedback loops of how thoughts affect emotions. We learn social skills of the rich and famous, so we too may be rich and famous. Just like the 1.5 Egocentric, we can do all these in delightful ways and in intrusive ways.

Since our parents have much less control over us at this point, it is the society and culture which needs to set limits on our intrusiveness. As a result, we get into culture wars between the 3.5 Achiever that wants to be free, and the 4.0 Pluralist Collective that expects politically correct behavior. Just like parents who created tools to set boundaries on our socially inappropriate behaviors Concretely, now society is creating tools to set boundaries on Subtle intrusions that harm people through inappropriate use of Subtle power.

Also, just like the 1.5 Egocentric had a process for maximizing empowerment, so too does 3.5 Achiever. They develop a new Subtle autonomy that allows them to act outside of previous social conventions. As a result, they can take new steps to initiate goals and aims that were previously unseen. They can follow



through, complete and celebrate. By seeing into the future and seeing Concrete systems, they can make complex strategic plans. These plans may be used to help society or not, but from a 3.5 perspective it is all about creating and executing my plan for success. Anyone who gets in the way of “my plan” is considered out of line, in the same way a parent is seen by their 1.5 child when a parent says “no” to them.

The 3.5 Achiever may support social justice or personal profit. It is not the content that determines the level, it is the way they conceptualize what they do. This 3.5 Achiever level encompasses parents, business persons, students, hippies or oil executives et al.

Having some distance from the conformist perfectionism they begin to look for what makes something good enough. They become a little more functionalist and a little less perfectionistic.

This functionalism allows them to expand their awareness a bit. With this expansion, they can see the overall picture and not get bogged down in the myriad minute details. As a result, they become better managers of whatever it is they manage, from money, to families, from business to NGOs. They now have the perspective they need to be able to operate independently, and successfully. Now rather than being “had by” the perspective, they “have” it. That does not mean they have the skills, rather they can see that they need them. As a result, they are likely to engage in professional skill building trainings. It is the power, the perspective and the skills all coming together that makes for a more successful experience at 3.5 Achiever.

## STAGE Description: 4.0 - Pluralist

*Early Fourth Person-perspective - Subtle / Collective / Reciprocal*

The 4.0 Pluralist stage is a Collective up-shift of the 2.0 Rule Oriented stage where reciprocity in humans arises for the first time. However rather than Concrete reciprocity, Subtle reciprocity arises at 4.0 Pluralist. They are able to step back from the one-way Subtle seeing of the Achiever, developing Collective awareness of their own and other's unexamined assumptions, interpretations, and judgments of earlier stages. Importantly they are aware that others can, Reciprocally, see these areas in them as well.

Question 1: Is the object of awareness Concrete, Subtle, or MetAware?				Question 2: Is the experience Individual or Collective?				Question 3: Is the experience Receptive, Active, Reciprocal, or Interpenetrative?			
PP		TIER		SOCIAL PREFERENCE		LEARNING SEQUENCE		STAGE NAME			
1.0		Concrete		Individual		Receptive		1.0 Impulsive			
1.5		Concrete		Individual		Active		1.5 Egocentric			
2.0		Concrete		Collective		Reciprocal		2.0 Rule Oriented			
2.5		Concrete		Collective		Interpenetrative		2.5 Conformist			
3.0		Subtle		Individual		Receptive		3.0 Expert			
3.5		Subtle		Individual		Active		3.5 Achiever			
4.0		Subtle		Collective		Reciprocal		4.0 Pluralist			

4.0 Pluralist: Early fourth person perspective - Subtle, Collective, Reciprocal

All of the .0 even numbered stages are stepping into a new perspective, and their work is to explore these new arising perspectives and their qualities. At first they just experience the perspective but can't name or prioritize the attributes or qualities. As they move through the stage they begin to put labels on categories and begin to prioritize them. Moving into the 4.0 Pluralist level is beginning this process.

There is a shift in insight from the 3.5 Achiever level to the 4.0 Pluralist level. The 3.5 Achiever can see and often predict what another person will do, but they are unable to notice that others can see and predict what they will do. In this transformation, there is a shift from this one-way-seeing to reciprocal seeing: the 4.0 Pluralist realizes that others can see their subtle interiors in return and they become very curious about Reciprocal sharing of feedback, thoughts and ideas because they want to know what others are seeing in them. With time, they discover that often others see things in them, which they themselves are ignorant of and likewise they can see subtle nuances in others in return. Their curiosity increases and they find it important to learn about themselves from what others are seeing that they don't yet know. Vulnerability and courage grow stronger as a result.

Their fourth person perspective expands and they realize that their own prior sense of objectivity is but a small part of reality: any observer is always filtering what is being observed through their own understandings. Variables cannot be isolated and boundaries between self and other are interdependent. Life is more ambiguous and less predictable than imagined previously; everything is relative to one's context. (This is an up-shift from the 2.0 Rule Oriented Concrete relativity of volume and area).

The new Subtle Collective that arises at this stage is the "Contextual", which they experience and can describe but can seldom name yet. It is the first stage that explores not only what one believes, but also the multiple situations and circumstances (contexts) in which those beliefs come about. Experiencing variable circumstances helps them see how they and others have been formed by these environments beyond Individual reasoning capacities and efforts of the earlier 3.5 stage. However at this stage they need the contextual experiences before they can categorize them and cannot yet prioritize them (some contexts are more beneficial than others).

In addition, the experience of Subtle energies, Subtle synchronicities, Collective consciousness, and the adaptable Individual flowing with the group may be experienced. The Pluralist uses these experiences to unearth hidden social and cultural assumptions and to make these visible to themselves and to others.

Because the 4.0 Pluralist tends not to prioritize or categorize, they tend to reduce the hierarchical relationships between themselves and those they supervise, recognizing the importance of two-way Reciprocal relationships to support learning. When giving feedback they are willing to see their part in the

process and go beyond policy to recognize creativity. This supports growth and development where everyone's thoughts and opinions are often taken into account. Because goal orientation isn't prioritized over relationship, meetings can sometimes become less organized, long and unwieldy with little progress toward decision-making.

Pluralists may have an allergy to Achievers who are very focused on linearity and goal orientation—nonetheless society will function even better with the combination of the three levels; Expert with their technical capacity for details, Achievers with their focus on goal orientation, and Pluralists with their Reciprocal approaches to co-creativity which can bring about an adaptability in the system that is unprecedented. However, none of these levels are likely to see the benefit of the other two views yet and culture clashes between them are common:

Qualities of the 4.0 Pluralist are

- Subtle both/and. You, and me: Reciprocity.
- Can stand in the contextual shoes of another; sees how others are socially constructed by their contexts and complex adaptive systems.
- Space: sentient centric. Context aware causes them to protect the environment and living things.
- Can't easily prioritize contexts, thus has horizontal views.
- Time: parent and children's lifetime; 10+ years forward and back; oriented to the present.
- Process is more important than goal orientation.
- Appreciate feedback even when it is painful, because they understand that others can see aspects of themselves that they themselves can't.
- Can accept that people are also different on their interiors, so LGBT rights arise.
- Awareness of the Subtle arises allowing them to widen the Achiever focus to see assumptions, judgments, ambiguities, and interpretations.

## Psychosocial Description: 4.0 - Pluralist

### *Early Fourth Person-perspective - Subtle / Collective / Reciprocal*

At the 4.0 Pluralist people become Subtle, prosocial human beings. This occurs when Subtle reciprocity arises and they can see the Subtle self in others and the Subtle Other sees your Subtle self. As a result, they begin to background the 3.5 Achiever Individual self in favor of the Subtle 4.0 Pluralist Collective self. This stage is an upshift of the 2.0 Rule oriented stage. Just like 2.0, 4.0 Pluralist is “had by” the Reciprocal cycle (they are in it more than observing it). When they submit themselves to the Subtle Reciprocal dynamic they gain depth of intimacy and being.

Just like in the 2.0 Rule Oriented stage, where they became focused on Concrete rules and roles, now the 4.0 Pluralist become focused on Subtle rules and roles. Instead of suppressing Individual independence, their focus is to identify “who you really are”. The new “rule” is to discover the Subtle self without suppression, and they can’t do that without reciprocity with others because others can see in you what you can’t see in yourself. As a result, Individuals engage with Collective tools that help them identify who they are deep within. The new roles, instead of being Concrete functional ones that suppress the Individual, are Subtle functional roles that accentuate the Individual through reciprocity with others. Instead of functional roles like housekeeper and bread-winner they explore archetypes like warrior and lover.

As people move deeper into understanding their Subtle self they realize all of us have a warrior and a lover; all of us have this same basic human consciousness. In this way, we are all alike. In this way, we begin to accept others. We support human rights-not just Individual freedoms-but human rights to dignity, regardless of whether they are the same on the inside or the outside. A common belief arises that everyone should seek and believe in basic dignity for all human beings and stick together.

At the 4.0 Pluralist level, the Subtle rule is: “Respect the dignity of every human being.” The second subtle rule is: Protect the dignity of every human being.” In this way, all human beings are respected. And if your belief isn’t to respect all human beings, then you get called out on it. And if you still don’t respect all human beings, then the 4.0 Pluralist will often treat you without dignity or equality.

Out of this cradle of respecting the dignity of all people, the deep authentic self emerges. We respect the dignity for all externally and we respect the dignity for all internally. The internal Collective which has been suppressed since 2.0 socialization, comes out of hiding. We still have the skill to not express that which should not be expressed in certain public settings, but we create settings where it is okay to express our various genuine truths or voices. This open culture allows for more hidden voices to emerge both internally and externally. As a result, we become increasingly more tolerant, understanding, respectful and even celebratory about diversity, both internally and externally. We realize each of our sub-personalities is valuable and every person on earth is valuable. The core lesson of 4.0 is deep honesty, complete openness and the result is the discovery of deep authentic selves and a more open society.



## STAGE Description: 4.5 - Strategist

*Late Fourth Person-perspective - Subtle / Collective / Interpenetrative*

The 4.5 Strategist is an up-shift of the 2.5 Conformist level in the Concrete Tier, but rather than holding Concrete views, their views are Subtle. While the 4.0 Pluralist has difficulty naming categories, and prioritizing amongst different contexts, developmental levels, and assumptions, 4.5 Strategists, in contrast, are able to prioritize among competing commitments, opinions and beliefs based on their priorities. Thus, they tend to value those perspectives that are developmental, people oriented, inclusive of other levels of development, dynamic, and which foster continuous learning. Because they see the value of all developmental levels even as they may clash, they try to develop behaviors and speech that can be experienced positively by all levels. This brings on a sheen of “sanitation” to their behavior and expression in their attempt to invite all levels into their field.

Question 1: Is the object of awareness Concrete, Subtle, or MetAware?				Question 2: Is the experience Individual or Collective?				Question 3: Is the experience Receptive, Active, Reciprocal, or Interpenetrative?					
PP		TIER		SOCIAL PREFERENCE				LEARNING SEQUENCE				STAGE NAME	
1.0		Concrete			Individual			Receptive			1.0 Impulsive		
1.5		Concrete			Individual			Active			1.5 Egocentric		
2.0		Concrete			Collective			Reciprocal			2.0 Rule Oriented		
2.5		Concrete			Collective			Interpenetrative			2.5 Conformist		
3.0		Subtle			Individual			Receptive			3.0 Expert		
3.5		Subtle			Individual			Active			3.5 Achiever		
4.0		Subtle			Collective			Reciprocal			4.0 Pluralist		
4.5		Subtle			Collective			Interpenetrative			4.5 Strategist		

4.5 Strategist: Late Fourth Person Perspective - Subtle, Collective, Interpenetrative

This is an Interpenetrative stage, so they take an outside view of systems and contexts and see their intersections, and so have the capacity to construct them as opposed to being socially constructed by them, as is the 4.0 Pluralist. Thus, 4.5 Strategists want to know how the different systems they are engaged in (organizations, family, society) interact with each other. They can consider the nested developmental systems in any system and can see how even disparate systems interconnect systemically.

An up-shift from the 2.5 Conformist, the 4.5 Strategist understands Subtle projections and upon reflections can identify their own and others' projected material on others. Thus, feedback from all sources is seen as necessary to identify their hidden shadows and to help them grow in self-knowledge and understanding of the world. Therefore, they value others' perspectives as part of a more complete picture, still seeking illustrations that will confirm or dis-confirm the assumptions, attributions, evaluations, judgments, interpretations, ambiguities, paradoxes, complicities and projections embedded in the feedback.

Strategists can co-create and work in collaboration with others to reach outcomes, not based on goals but realized by following their ethical principles.

- Interpenetration: You are me, and I am you; ability to see Subtle projections.
- Sees social construction of reality and can prioritize and create contexts.
- Development and maturing the authentic self is a basic ground of life.
- Developmental rights arise.
- Time frame: past and future generations
- Space: Sentient/Planet-centric. Prioritizes contexts for the benefit of humanity, the planet and all living things.
- Awareness matures and evolves ethical principles. They can adaptively zoom out with awareness and zoom in with focusing.
- Embraces paradox, and projections; looks for guiding principles/values upon reflection.
- Creates developmental contexts that support transformative experiences.
- Seeks feedback as essential to development

## Psychosocial Description: 4.5 - Strategist

*Late Fourth Person-perspective - Subtle / Collective / Interpenetrative*

At 4.5 Strategist, we begin to expand our consciousness sufficiently to step outside of the Subtle Reciprocal dynamic. As a result, we can observe the patterns that operate therein. By observing these patterns, we begin to derive Subtle principles that seem to explain the pattern dynamics of the Subtle human mind and the interactions of these minds in system dynamics. This provides a great deal of power and wisdom, in helping to shape human systems internally and externally.

By being able to shape the systems of interaction, we can now move from simply supporting the honest expression of each human being and offering dignity for each human condition, to creating systems where this dignity become a predictable outcome of the system dynamic we create. This leads to significant efficiencies and change. Whether we are working with internal systems in psychotherapy or external systems in families or businesses, by seeing how the system itself produces the results, for better or for worse, we can make efficient changes to the system to create better outcomes.

When done successfully, the results are magnificent: internally, we can come to a place of deep internal peace. This is different from an earlier peace we may be able to get. The reason is that earlier peace arises by releasing a thought or an emotion. From 4.0 we embrace it and from 4.5 we integrate it into an internal system that leads to sustainable peace of mind, not just a temporary relief from monkey mind that we try to push away.

Externally, we can make families, businesses, and social groups operate in much more enjoyable and efficient ways. One of the hallmarks of 3.5 is efficiency. One of the hallmarks of 4.0 is depth. At 4.5 we marry these two into efficient systems that simultaneously support depth of human experience.

Empathy expands again, not just for the dignity of each human being, but also the system dynamics that lead to those conditions. Some suffering is necessary for human development, and some suffering is completely pointless. Understanding when to allow suffering for growth and when to eliminate pointless suffering becomes an important distinction that arises at this developmental level.

There are three categories of skills we use to address systems: deletion, alteration and addition. Deletion allows us to understand how to take out an element of a system that is dysfunctional. Addition allows us to put one in that is functional. Alteration allows us to change a part of a system that is worth keeping but needs a shift to make it work better.

These are the same skills we can use at 2.5 in Concrete dynamics such as automotive parts and with people with Concrete behaviors. But now we can do it with Subtle patterns using Subtle interventions to create small or enormous changes that affect both the Subtle and the Concrete worlds.

As we understand these systems that exist internally and externally, we begin to understand how systems change through time. We see how we have changed through time and we begin to have compassion for ourselves for the mistakes we made throughout our history, because even though we can see better solutions now, we couldn't see better solutions then. It is our history and our ability to take expanded perspective that are allowing this wisdom for better ways of handling things. As a result, developmental recognition and developmental rights emerge. By having acceptance and compassion for people at all developmental levels, as well as all our current and historical selves, at all developmental levels, we are able to make peace with an even broader swath of humanity.

By understanding these systems, we can now construct internal systems that allow us to come to a greater internal peace. We can also reconstruct systems that will bring others in other systems to a greater peace.

## MetAware Stages:

*5.0 Construct Aware, 5.5 Transpersonal, 6.0 Universal, 6.5 Illumined*

The MetAware stages add the capacity to observe and work with very Subtle and empty objects as well as Concrete and Subtle objects. The poles are as follows:

- MetAware Individual: witness or awareness of awareness
- MetAware Collective: Universal
- MetAware Interior: Emptiness, illusion
- MetAware Exterior: form, fullness, immanence

Question 1: Is the object of awareness Concrete, Subtle, or MetAware?		Question 2: Is the experience Individual or Collective?		Question 3: Is the experience Receptive, Active, Reciprocal, or Interpenetrative?		
PP	TIER	SOCIAL PREFERENCE		LEARNING SEQUENCE		STAGE NAME
1.0	Concrete	Individual	Receptive	1.0 Impulsive		
1.5	Concrete	Individual	Active	1.5 Egocentric		
2.0	Concrete	Collective	Reciprocal	2.0 Rule Oriented		
2.5	Concrete	Collective	Interpenetrative	2.5 Conformist		
3.0	Subtle	Individual	Receptive	3.0 Expert		
3.5	Subtle	Individual	Active	3.5 Achiever		
4.0	Subtle	Collective	Reciprocal	4.0 Pluralist		
4.5	Subtle	Collective	Interpenetrative	4.5 Strategist		
5.0	MetAware	Individual	Receptive	5.0 Construct Aware		
5.5	MetAware	Individual	Active	5.5 Transpersonal		
6.0	MetAware	Collective	Reciprocal	6.0 Universal		
6.5	MetAware	Collective	Interpenetrative	6.5 Illumined		



## STAGE Description: 5.0 - Construct Aware

*Early Fifth Person-perspective - MetAware / Individual / Receptive*

Construct Aware is the second up-shift from Impulsive 1.0 and Expert 3.0. Here a new self arises; a MetAware self and is a shift from the Subtle Tier to the MetAware Tier. This is one of the most difficult developmental transformations because there are so few people at this and later levels to build connections with.

Question 1: Is the object of awareness Concrete, Subtle, or MetAware?		Question 2: Is the experience Individual or Collective?		Question 3: Is the experience Receptive, Active, Reciprocal, or Interpenetrative?		
PP	TIER	SOCIAL PREFERENCE		LEARNING SEQUENCE		STAGE NAME
1.0	Concrete	Individual	Receptive	1.0 Impulsive		
1.5	Concrete	Individual	Active	1.5 Egocentric		
2.0	Concrete	Collective	Reciprocal	2.0 Rule Oriented		
2.5	Concrete	Collective	Interpenetrative	2.5 Conformist		
3.0	Subtle	Individual	Receptive	3.0 Expert		
3.5	Subtle	Individual	Active	3.5 Achiever		
4.0	Subtle	Collective	Reciprocal	4.0 Pluralist		
4.5	Subtle	Collective	Interpenetrative	4.5 Strategist		
5.0	MetAware	Individual	Receptive	5.0 Construct Aware		

5.0 Construct Aware: Early Fifth Person Perspective - MetAware, Individual, Receptive

This new identity manifests as the shift to awareness as one's identity, rather than the authentic Subtle 4.5 self. Awareness, observing itself and all the objects arising within it begins to arise. Because awareness is so wide at this stage, at first the Construct Aware person may feel disoriented and may have trouble getting a coherent sentence out of their mouth since awareness is beyond thought. All of the material in their awareness continues to interrupt thinking and speaking. As well, disorientations may



drive people to move, break up relationships and look for new work before they realize that all this is, perhaps, unnecessary—it is a part of shedding the Subtle skin of the previous Tier and one is momentarily blind to what is beginning to arise.

As they mature into this stage, the 5.0 person can see the recursive patterns of development, the social construction of reality, projections in the moment that arose at the previous stage, and how all this plays out historically in addition to their own story. They begin to see how we reify and make Concrete our own Individual constructions and stories through our words and their assumed definitions and boundaries. In seeing all of this in the moment, they are able to be incredibly agile, to see things that other people can't yet see, and to turn things inside out, upside down, in various unusual and paradoxical ways to move processes forward.

An upshift of the 1.0 and 3.0, this is a non-hierarchical stage, where prioritization at the MetAware level is minimal. In addition, it is an Individual stage, marinating in the newly awakening MetAware self. This moves the understanding of the social construction of reality from the 4.0 and 4.5 Collective, to a new understanding of how the Individual creates their own constructions of meaning-making.

Construct Aware Individuals:

- Explore the early contours of their MetAware self.
- Have a historic time frame.
- Have an earth related space frame.
- Begin to see and dis-identify with the Subtle ego as "me".
- Thus, they have a beginning concern about hubris.
- Sees the mind's constructions of word definitions and boundaries.
- Accepts that feedback is a useful construct.
- Sees Subtle projections in the moment.
- Begins to develop conscious awareness in the moment in their walking around waking life.
- Sees recursive processes naturally.

## Psychosocial Description: 5.0 - Construct Aware

### *Early Fifth Person-perspective - MetAware / Individual / Receptive*

At the previous 4.5 Strategist, there is an understanding of how reconstructing systems internally and externally can have profound shifts upon the way people experience their lives. They can see that all their lives have been constructed by systems and the contextual. With just one step back, at 5.0 Construct Aware they begin to see ultimately that all our experiences with meaning and subtle boundaries are created by our mind within those systems. They begin to look at *how* the mind itself constructs the experiences they have. With this dawning awareness, they begin to let loose historical patterns that control their mind and begin to experiment with their subtle boundaries, at times pushing them far out to create an expansive, peaceful open field,

However, the Concrete and Subtle worlds often intrude upon this peace. They still need to survive and they may still have families to take care of, jobs to go to, and partners to attend to. Unable to live in two worlds at once, they may revert to 4.5 Strategist to survive successfully. On the other hand, they may dive full force into the calling of 5.0 Construct Aware and abandon family, business, and partner for the guaranteed and easily accessed expansiveness of a 5.0 life. Some choose a third route which is to hold the tension between the two until a resolution occurs that allows adaptability of both views to merge. They may work less, and they may bring their 5.0 experience into family life, creating a more in-depth presence than they could before.

At this point they see that the external world and the internal self, are reflections of each other even more intimately and immediately. Projections and perceptions of the external world are immediately seen within and the interior wonders are seen beyond. Awareness expands, often beyond the boundaries of the physical body and they feel themselves accessing a new self-identity.

As they are birthed into this world of awareness, and as they live there for a spell, the experience that this is their new identity begins to solidify. The entire Concrete and Subtle worlds become simplistic illusions, and distractions from a deeper truth.

1.0 Impulsive was birthed out of a womb that held us, into this big open world. Our job was to learn how to trust in this foreign environment where there seems like there is nothing to hold us. The 3.0,] Expert, was birthed out of the Concrete world (where they could hold Concrete things in their hand), into the Subtle world where they could hold non-Concrete things in their mind. Then there was another birthing into a vast world that required another level of trust. At 5.0 Construct Aware, all the Concrete experiences and all the Subtle experiences they have had their whole life come tumbling down into a basket of illusions, and they are thrust into awareness with no up or down, and nothing there to hold them. They again must develop trust that this vastness, with no earth beneath their feet will, despite all logic, hold them. Like magic, it does hold them, and can put them in a state of awe, wonder, delight, and if they are courageous enough, a sense of blissful humbleness. Being guided by a developmental psychotherapist can bring this possibility into play. Often without guidance, however this stage can feel disconcerting, confusing and tiring until the new identity is stabilized.

## STAGE Description: 5.5 - Transpersonal

*Late Fifth Person-perspective, MetAware / Individual / Active*

The 5.5 Transpersonal stage is the second up-shift from the Concrete 1.5 egocentric stage and the Subtle 3.5 Achiever stage, and thus it has many of the same qualities of these stages, but at a very Subtle level. This includes one-way seeing at the MetAware level, frequently with a feeling that others can't see them in return from that view.

Question 1: Is the object of awareness Concrete, Subtle, or MetAware?				Question 2: Is the experience Individual or Collective?				Question 3: Is the experience Receptive, Active, Reciprocal, or Interpenetrative?			
PP		TIER		SOCIAL PREFERENCE		LEARNING SEQUENCE		STAGE NAME			
1.0		Concrete		Individual		Receptive		1.0 Impulsive			
1.5		Concrete		Individual		Active		1.5 Egocentric			
2.0		Concrete		Collective		Reciprocal		2.0 Rule Oriented			
2.5		Concrete		Collective		Interpenetrative		2.5 Conformist			
3.0		Subtle		Individual		Receptive		3.0 Expert			
3.5		Subtle		Individual		Active		3.5 Achiever			
4.0		Subtle		Collective		Reciprocal		4.0 Pluralist			
4.5		Subtle		Collective		Interpenetrative		4.5 Strategist			
5.0		MetAware		Individual		Receptive		5.0 Construct Aware			
5.5		MetAware		Individual		Active		5.5 Transpersonal			

5.5 Transpersonal: Late Fifth Person Perspective, MetAware, Individual, Active

This is an Active Individual stage where (sometimes fierce) ownership arises again, and at this stage it often relates to owning creative and unusual constructions in their field of passion that they have developed. Beginning their early move into this stage, extraordinary capacities to bend, twist, redefine, construct, reconstruct, prioritize/categorize constructions, and to see unusual connections between very

disparate paradigmatic fields occur, and these can be amalgamated together in such a way that there is an entirely new form created such that the initial fields/models are unrecognizable. 5.5 Transpersonal Individuals “have” their Individual constructs rather than being “had by” them, and they can see how these constructions reify into form, however unconscious and unintended by most people. They can see how they can develop these constructions consciously for their own benefit as well as for the benefit of humanity or for a planetary cause.

Their uncanny and unusual capacity to prioritize endless elements of the areas of their interests, supports them to make wholly new, rare and elegant models or other creations. This kind of creating often feels magical to them (an up-shift from the magic of 1.5 and of 3.5), with a promise of solving many of the struggles humanity is suffering from. Protection of this kind of property has not arisen yet. Indeed the 5.0 and 5.5 Transpersonal levels still have their feet in the Subtle Collective since they haven’t yet matured to the MetAware Collective stages yet, so they tend to use Subtle approaches to ownership, such as intellectual property protections.

Many people at this level burn-out on being taught; they want to do the teaching themselves at this level, so may put forth offerings related to their passions with the intention of sharing their own knowledge and understandings.

As well, in the mature part of this stage, there is a recognition of the timeless which supports a letting go into a larger view.

- MetAware either/or thinking- MetAware choices and one-way seeing at the 5.5 level. May not feel deeply seen by others.
- Owns the MetAware self: conscious awareness.
- Sees two sides of most any polar pair and chooses the side/polar opposite they identify with.
- Can prioritize constructs, integrate them, combine them, categorize them.
- Meta-model building around a passion: combine multiple models of varying perspectives into new models, experiences or other representations of these new creations. These creations can be interior (such as psychotherapy approaches) or exterior (such as global systems).
- Have historic time frame.
- Have an earth space frame, and its place amongst the system.
- Clearly aware of the Subtle ego: concern about hubris/arrogance.
- Feedback is seen in terms of projections, shadow and hubris.
- Witnessing in the moment in waking life is a natural spiritual practice.
- Identifies with Awareness as their view.
- Late Transpersonal begins to let go of their constructions into emptiness through the recognition of the timeless.



## Psychosocial Description: 5.5 - Transpersonal

*Late Fifth Person-perspective, MetAware / Individual / Active*

As people move into 5.5, after drifting in the Receptive field of Construct Aware, they find footing among the expansiveness. Somehow, they can walk here, can talk here, and can engage in lively activity. It is a different walking, a different communicating and a different “doing”, but they discover new versions of how it can be done.

Just like 1.5 Egocentric is a spontaneous whirlwind of endless energy rampaging throughout the house; just like 3.5 Achiever is a spontaneous powerhouse of activity ravaging the earth for better or worse; the 5.5 Transpersonal experiences pure energy in their passions exploding throughout the vastness.

Just like in 1.5 Egocentric and in 3.5 Achiever experiences at their levels, the 5.5 Transpersonal does not yet see the boundaries of their Subtle Tier Collective. They crash through boundaries in the MetAware yard, enjoying spontaneous play in the gardens of awareness which travels at much higher speeds than Subtle thought and Concrete locomotives.

Often, in this stage, people can get quite narcissistic, feeling they have reached the apex of human capacity. This can be a conundrum since the MetAware Collective is so rare that it isn't readily available to set boundaries on any possible 5.5 narcissism. Therefore, it is very important for any kind of narcissistic shadow to be confronted before they get to this stage, for most people at this stage don't have access to a 6.0 MetAware Collective. In the few cases that we have witnessed this partnership, the 6.0 MetAware Collective, which is often only one or two people, sets boundaries upon them by giving insightful information when it is discovered that the 5.5 Transpersonal believes their elevated self-assessment. Often, just like in 1.5 Egocentric and in 3.5, Achiever, this adjustment happens when they have crossed some serious boundaries. In the meantime, it can be a wild and spontaneous world of discovery. The wonder of butterflies at 1.5 Egocentric and the wonder of strategic plans at 3.5 Achiever are specks of dust in the exploration of a horizontal multi-verse of mind wanderings (often experienced as a hierarchical multi-verse) of the 5.5 Transpersonal mind.

Just like at 3.5 Achiever, if the 5.5 Transpersonal does not carry with them some vestige of ethics from the earlier Tiers they can be highly destructive in home, business and in the world in general. However, this stage as a check for this narcissistic tendency by the recognition of their Subtle ego, which brings humility, and a deep concern for hubris, and this combination of ethics and recognition of Subtle ego tendencies will usually check the tendencies of narcissism.

As they turn their attentions back to earthly musings, the experience of exploring at the speed of awareness becomes a powerful tool for change in the previous Subtle and Concrete worlds where experience travels at the speed of Subtle thought or Concrete locomotives. As a result, the 5.5 Transpersonal can be very quick. If they have embedded a solid sense of ethics and have had the courage to experience the humbleness sitting in the MetAware vastness then they are primed to be able to produce some positive changes in a complex world.

## STAGE Description: 6.0 - Universal

*Early Sixth Person-perspectives - MetAware / Collective / Reciprocal*

The 6.0 Universal is a second shift, up from the 2.0 Concrete Rule-Oriented and the 4.0 Subtle Pluralist, and has many of the same qualities, but on the MetAware level. At this level the Individual MetAware witness is back-grounded to the MetAware Collective, and for the first time, there is only one Collective: the Universal which holds everything Concrete, Subtle and very Subtle (the material world, the Subtle world of all life and the MetAware world of mind and awareness).

Question 1: Is the object of awareness Concrete, Subtle, or MetAware?				Question 2: Is the experience Individual or Collective?				Question 3: Is the experience Receptive, Active, Reciprocal, or Interpenetrative?			
PP		TIER		SOCIAL PREFERENCE		LEARNING SEQUENCE		STAGE NAME			
1.0		Concrete		Individual		Receptive		1.0 Impulsive			
1.5		Concrete		Individual		Active		1.5 Egocentric			
2.0		Concrete		Collective		Reciprocal		2.0 Rule Oriented			
2.5		Concrete		Collective		Interpenetrative		2.5 Conformist			
3.0		Subtle		Individual		Receptive		3.0 Expert			
3.5		Subtle		Individual		Active		3.5 Achiever			
4.0		Subtle		Collective		Reciprocal		4.0 Pluralist			
4.5		Subtle		Collective		Interpenetrative		4.5 Strategist			
5.0		MetAware		Individual		Receptive		5.0 Construct Aware			
5.5		MetAware		Individual		Active		5.5 Transpersonal			
6.0		MetAware		Collective		Reciprocal		6.0 Universal			

6.0 Universal: Early Sixth Person Perspectives - MetAware, Collective, Reciprocal

Since this is a non-hierarchical stage, priorities and categories don't make much sense, so these worlds are usually seen as an inseparable One, and when one experiences being in reciprocity with the Universe, a deep sense of Oneness often arises where all previous levels and views seem minuscule to the vastness and eternity of this infinite Universe that is beyond all of manifestation and definition. Unification states often arise at the first part of this stage and later, on the emptiness side of this level. Sometimes there is an experience of the backgrounding of self to this wholeness which is their new Collective, is everything, and isn't separate from the ocean of the timeless and boundless. Awareness ripples out infinitely:

- Reciprocity between the Universe and timeless boundless awareness.
- Unification experience with the whole of the Universe, manifestation, existence.
- May lose the witnessing self in the whole; the MetAware witnessing Individual is backgrounded to the whole of all existence.
- The Whole of the Universe may be experienced as coming through them, as them.
- Both/and consciousness begins to integrate emptiness and fullness, and Individual and Collective.
- The Universal Collective (whole) manifests Individual awareness identity, rather than agency being in a person. Experience is experienced as fluid and seamless.
- All-at-once "wholes" may come into consciousness without any effort or thought.
- Universal and energetic flows and vibrations create the base of later prioritizing and categorizing: living in the moment.
- May be poetic and use unusual metaphors to express where words fail, (as do other earlier and later levels).
- Universal Love/compassion without an object matures.

## Psychosocial Description: 6.0 - Universal

*Early Sixth Person-perspectives - MetAware / Collective / Reciprocal*

***Much of this description is expressed as metaphor since this is a very rare stage and people have difficulty finding words for their experience here.***

As the 5.5 Transpersonal Individual moves into 6.0, the experience of timelessness beacons a deeper reciprocity with the 'MetAware' field signals. As they listen deeply, these signals become the new interpersonal communication with the open field. Intimacy with the MetAware Collective experience deepens and just as in 2.0 Rule Oriented, where they can lose themselves within the embrace of a friend or lover; just like in 4.0 Pluralist, where they can lose themselves in the presence of people in their contextual field; at 6.0 Universal they lose the Individual Construct Aware-self they have identified with, in the allure of the field of boundless changeless awareness. Drifting in this interactive embrace of MetAware be-ing-ness, brings a new depth of intimacy that is so enticing that they willingly surrender their 5.5 Transpersonal Individuality to live in what may be experienced as oneness between the vast Universe and a grain of sand.

The 6.0 Universal Individual may feel themselves, and the entire universe emerging, each moment as a miracle of nothingness being birthed into something-ness from the simple kiss of consciousness upon the sweet cheek of empty vibration. A deep appreciation arises whether witnessing a sunset or a cesspool. It matters not the appearance for the appreciation is in the miracle itself. The source and the outcome may be directly experienced as one; a manifest presence alive within this sea of empty vibration. There may be a recognition that from this place of abundance, they come into this world; from this place of vast awareness, they observe the entire universe; from this place of abundance, they touch into the vibration preceding the thoughts of human mind, for it is here, as the vibration forms into thought that the ultimate outcome of the Concrete and Subtle worlds emerge. Touch the vibration, alter the thought, recreate the world. Boundless awareness flows freely among those who apprehend the mind before it appears from the ether.



## STAGE Description: 6.5 - Illumined

*Late Sixth Person-perspectives - MetAware / Collective / Interpenetrative*

The Illumined level is the second up-shift from the 2.5 Concrete, Conformist level and the 4.5 Subtle Strategist level and it has many of the same qualities but on a MetAware level. This is a Collective, Interpenetrative, prioritizing level that fore-grounds the Universal Collective (the material world, the world of life and the world of mind/awareness). At this level projections upon reflection come up. The way this manifests at the Illumined level is that for the most part the unification of emptiness and fullness arises and matures through this stage as interpenetration. One projects emptiness into fullness and fullness into emptiness on a Universal Collective plane.

Question 1: Is the object of awareness Concrete, Subtle, or MetAware?		Question 2: Is the experience Individual or Collective?		Question 3: Is the experience Receptive, Active, Reciprocal, or Interpenetrative?		
PP	TIER	SOCIAL PREFERENCE		LEARNING SEQUENCE		STAGE NAME
1.0	Concrete	Individual	Receptive	1.0 Impulsive		
1.5	Concrete	Individual	Active	1.5 Egocentric		
2.0	Concrete	Collective	Reciprocal	2.0 Rule Oriented		
2.5	Concrete	Collective	Interpenetrative	2.5 Conformist		
3.0	Subtle	Individual	Receptive	3.0 Expert		
3.5	Subtle	Individual	Active	3.5 Achiever		
4.0	Subtle	Collective	Reciprocal	4.0 Pluralist		
4.5	Subtle	Collective	Interpenetrative	4.5 Strategist		
5.0	MetAware	Individual	Receptive	5.0 Construct Aware		
5.5	MetAware	Individual	Active	5.5 Transpersonal		
6.0	MetAware	Collective	Reciprocal	6.0 Universal		
6.5	MetAware	Collective	Interpenetrative	6.5 Illumined		

6.5 Illumined: Late Sixth Person Perspective - MetAware |Collective | Interpenetrative



Prioritization and categorizing are no longer a struggle and one can experience the nested worlds within the Universe. The Illumined person backgrounds Individuality to the Collective; but this is a stage that begins to shift into the next Unified Tier, so the Unification beyond the oceanic experience is forming with the witness arising as a mere location. reflecting a mirror like understanding of the relative world with the vastness of the timeless-boundless.

Upon reflection, they can see the projections of the entire world of the human mind on the other worlds (matter and life), and recognize that all these assumptions are constructed by the world of mind itself; projections that are readily identified within the world of mind itself. For example, the projection that the whole of humanity's sciences have on the animal world and the world of matter are really reflecting through the world of mind and the particular distinctions and interpretations that it can make because of the limitations of the senses.

- Interpenetration: All emptiness and fullness interpenetrates non-dually, and is seen by a silent witness as a location upon reflection.
- Sees construction of all reality by Mind and can prioritize worlds/different universes created by Mind.
- Universal evolution.
- Eternity and infinity are no longer confused with the timeless boundless.
- Interpenetration of universal Individual and universal Collective, emptiness and fullness.
- Capacity to create Meta Visions that encompass and describe one Whole.

## Psychosocial Description: 6.5 - Illumined

*Late Sixth Person-perspectives - MetAware / Collective / Interpenetrative*

***Much of this description is expressed as metaphor since this is a very rare stage and people have difficulty finding words for their experience here.***

The 6.5 Illumined begins and, to a great degree, completes the process of integrating the Concrete, Subtle and MetAware Tiers into an integrated nesting of “all” and “one”. The 2.5, Conformist steps out of being ‘had-by’ peer pressure by seeing Concrete dynamics and developing principles to stand on that will make the cycle of life better. The 4.5 Strategist steps out of being ‘had-by’ their socially transmitted political correctness by understanding system dynamics and addressing systems issues instead of getting into conflict with people who don’t support their political correctness. The 6.5 Illumined steps out of being subsumed in the “one” with understanding MetAware (awareness) processes that point to unification.

At 6.0 Universal, they swam in boundless changeless awareness and at 6.5, Illumined they witness the ever-present ocean of their awareness and everything that arises within it. Non-hierarchical vibrancy that is experienced at 6.0 Universal, is seen within a sea of awareness at 6.5 where the integration of the Concrete, Subtle and MetAware come together within this ocean. All distinctions and wholes are nested in an integrated manner. 6.0 Universal experiencing ‘all’, grows up to integrating ‘all and one’ at 6.5.

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# Appendix

## STAGES Theoretical Primer

There are many ways to develop a theory. One way is to ground yourself in your life and the lives of research participants, noticing patterns, categories and trajectories, and develop a theory based on experience. We see this in the developmental models developed by Loevinger, Cook-Greuter, Kegan and others. We can be quite sure that these models are sturdy, because they come out of real experiences and aren't simply entrancing ideas made up by the mind.

A second way to develop theory is to study multiple theories each of which are hopefully based on direct experience and to develop a theory that ties together all these other theories. This meta-theory is likely to be sound because it is based on others' grounded experiences, even though the experiences may not be personal.

A third approach is to develop a sound meta-theory from day-to-day observational research. After gathering much relevant data, often through years of research, one can arrive at an overarching meta-theory. A major benefit of this approach is that any new data coming from subsequent observations can be sifted through the meta-theory, which can act as a scoring mechanism for all incoming data. This brings an additional layer of soundness to the developmental model: from the ground up and from the top down. Fischer's work, and the Lectica developmental system are examples of this approach.

The STAGES theory is a combination of the first two approaches and a variation of the third. It incorporates the Integral Meta-theory of Ken Wilber, with personally grounded and documented experience that was researched through Jane Loevinger and Susanne Cook-Greuter's Sentence Completion Test.

Wilber integrated over 100 developmental models to arrive at his four quadrant Integral meta-model, bringing a soundness to the trajectory of development in four areas: the interior of an Individual, the exterior of the Individual, the interior of a Collective and the exterior of a Collective. All four of these areas

have a developmental trajectory that resulted from the integration of these 100+ models. The Loevinger lineage was included in this meta-model.

The Sentence Completion Test, has been utilized as a grounded data collection approach for over 30 years, supported by hundreds of research studies, thus being a well-documented developmental approach for many years through the work of Loevinger, Torbert and Cook-Greuter.

By sifting the data of the Loevinger lineage, through the theory of the Integral Frame by Ken Wilber, the STAGES model allows for the scoring of the grounded data through a meta-theory, which is similar to the third approach described above. The primary difference is that the theory and the data were derived separately, even as the Integral model already incorporates the Loevinger lineage. The Integral meta-theory is particularly relevant because it integrates multiple developmental models in addition to the Loevinger lineage and offers a four-quadrant approach to sifting the developmental data.

## Taking a Microscope to the Integral Model

Below is Ken Wilber's elegant Integral Model. The upper pole represents the Individual. The lower pole represents the Collective. The right pole represents the Exterior, and the left pole represents the Interior. These two polar pairs intersect so that there are four quadrants into and through which we can peer, supporting different ways to categorize our perspectives and experiences. Looking from the center point of the diagram we see the Concrete Big Bang represented, before which we have no information. Each quadrant shows the resultant trajectory that arose out of that mysterious event.

The trajectories in each quadrant resulted from the integration of and categorization of over 100 developmental models, placed carefully in the appropriate quadrant. The trajectories begin at the big bang and move through time past the present day and into the possible future.

# Wilber's Four Quadrants

However this view is so all encompassing that we sometimes can't get a very useful understanding of how the spaces in this model represent our own personal embodied experiences.

To aid ourselves in working with this model related to personal experience, Terri developed a more granular view by simply drawing lines to put borders around the Concrete views, the Subtle views, the MetAware views and the Unified views.

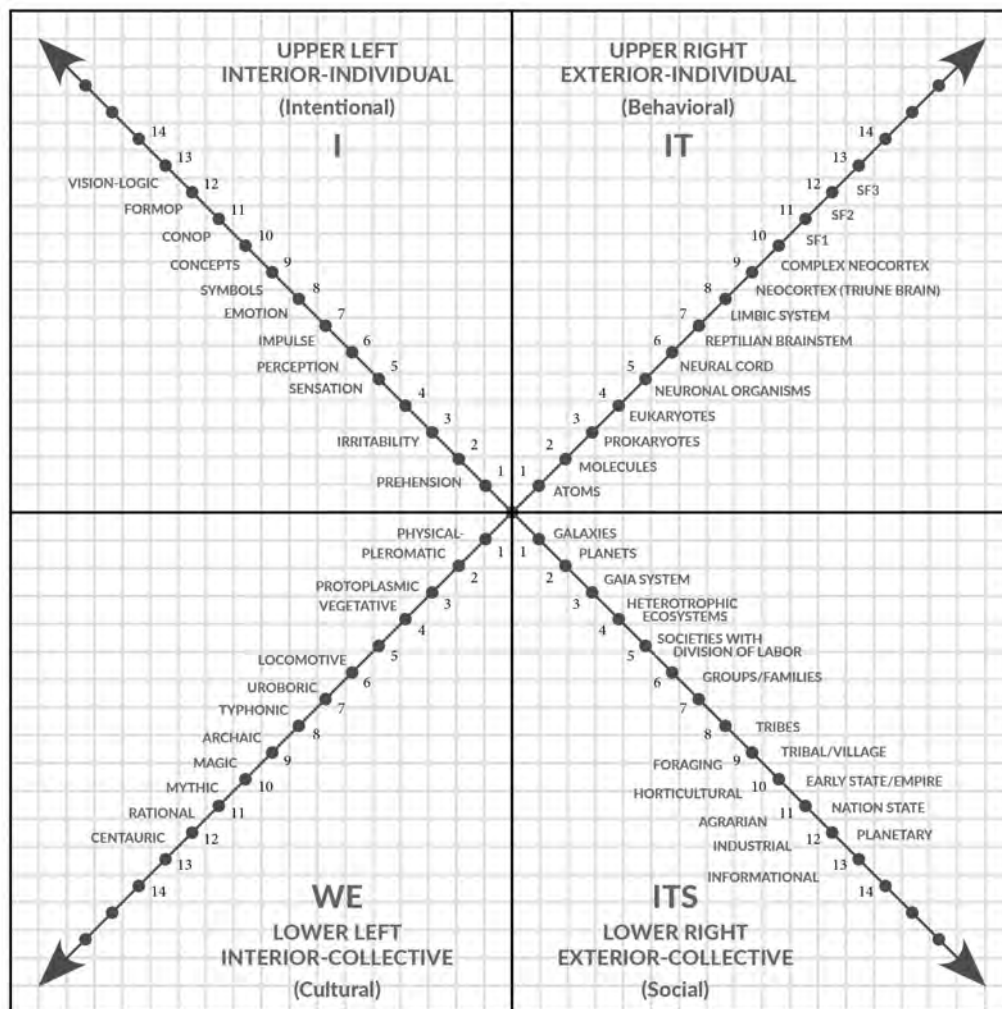


Figure 1. The Four Integral Quadrants



## Wilber's Four Quadrant Model

Next Terri realized that the poles themselves would be specific to these sub-quadrants. Thus, there would be a Concrete Individual/Collective and Interior/Exterior, a Subtle Individual/Collective and Interior/Exterior, and a MetAware Individual/Collective and Interior/Exterior. The more granular poles for each of these sub-quadrants would allow us to more fully use this symbolic map to gaze at our actual experiences in a more grounded way.

The following map identifies these more granular views.

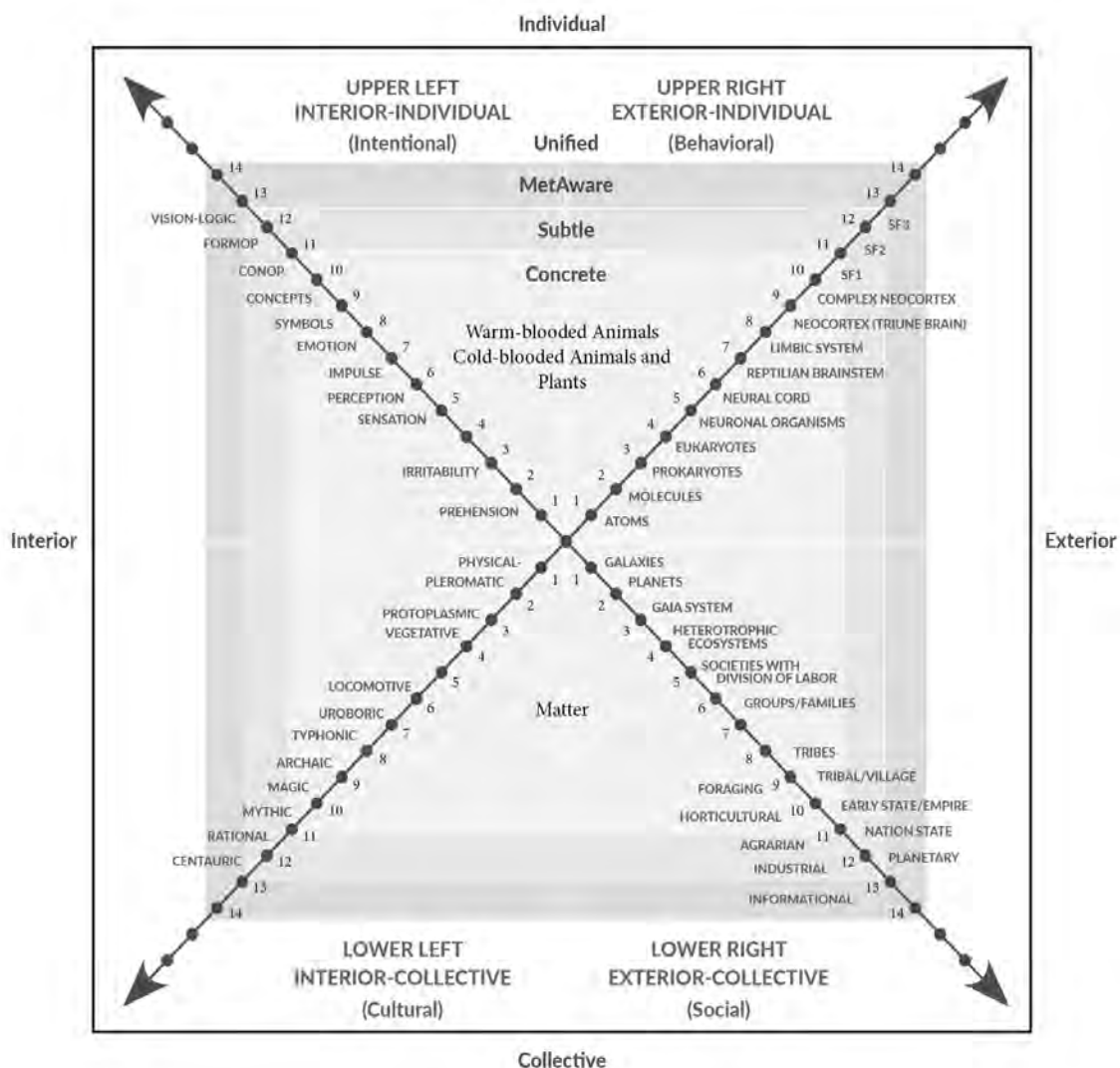


Figure 2. The Integral Model divided into sub quadrants

# Wilber's Integral Model

As helpful as this granularity is, it still leaves out a very large part of Wilber's theory; the insides and the outsides, known as the zones.

The eight zones added a large developmental component to the granular approach to the quadrants for it added another polar pair to make three: The Individual and the Collective (top and bottom poles), the Interior and the Exterior (left and right poles) and the Insides and the Outsides (the zones).

The STAGES model works with these three polar pairs depicted by the model below.

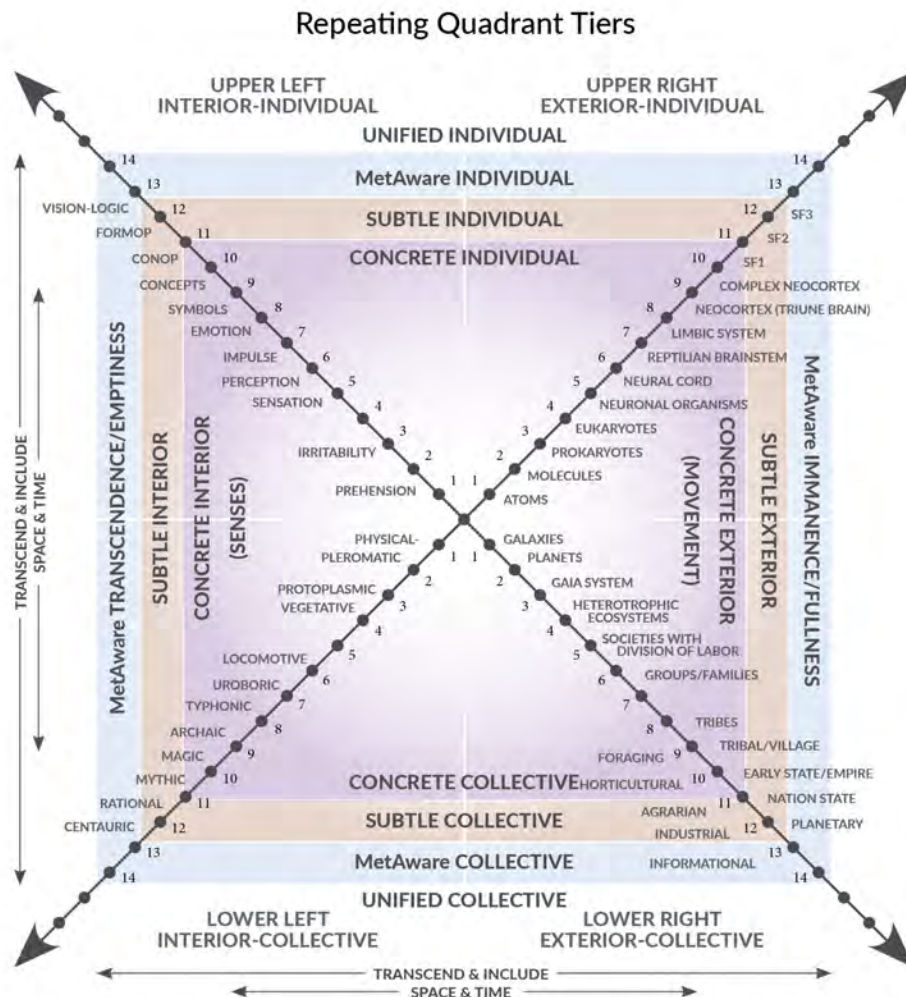


Figure 3. Integral Sub-quadrant Poles

## Wilber's Quadrants with Zones

The next task was to put these three polar pairs all together where the zones would all show up in every one of the sub-quadrants on the granulated Integral MAP.

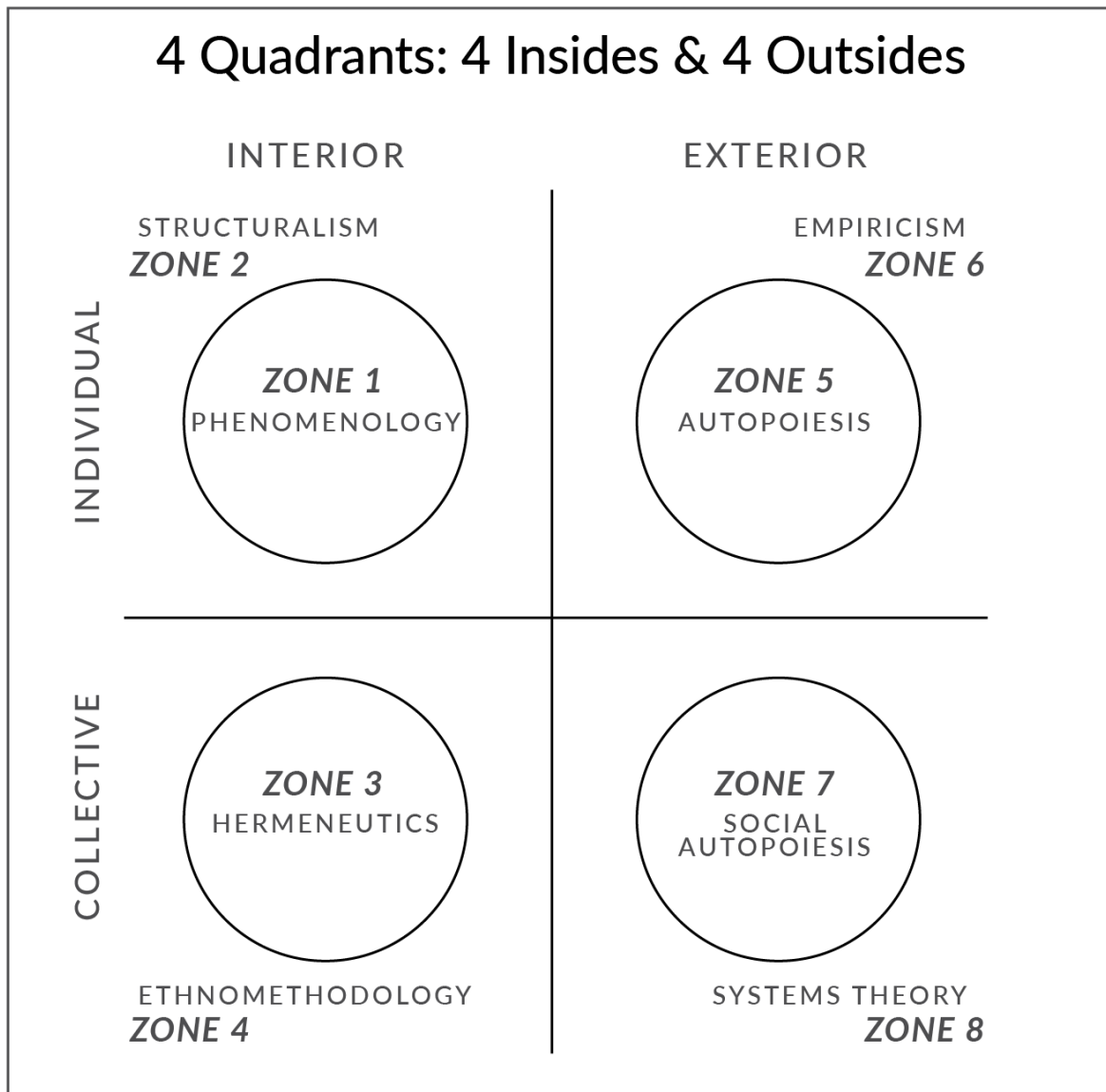


Figure 4. Wilber's 8 Zones

## The Integral Sub-Quadrants in One MAP

In this map we see the Concrete quadrants, which are formed by their three sets of Concrete poles (Individual/Collective, the top and bottom poles of the Concrete quadrants; the Interior/Exterior, the right and left poles of the Concrete quadrants, and the Insides/outside, which are represented by the spaces inside of and outside of the circles on the map.

This repeats for each of the sub-quadrants; the Concrete Sub-quadrants, which have Concrete poles; the Subtle Sub-quadrants, which have Subtle poles and the MetAware Sub-quadrants, which have MetAware poles.

We can isolate each of these sub-quadrants, which help us to understand the boundaries of the different spaces; what each space represents; and if they are empty, what might be represented there.

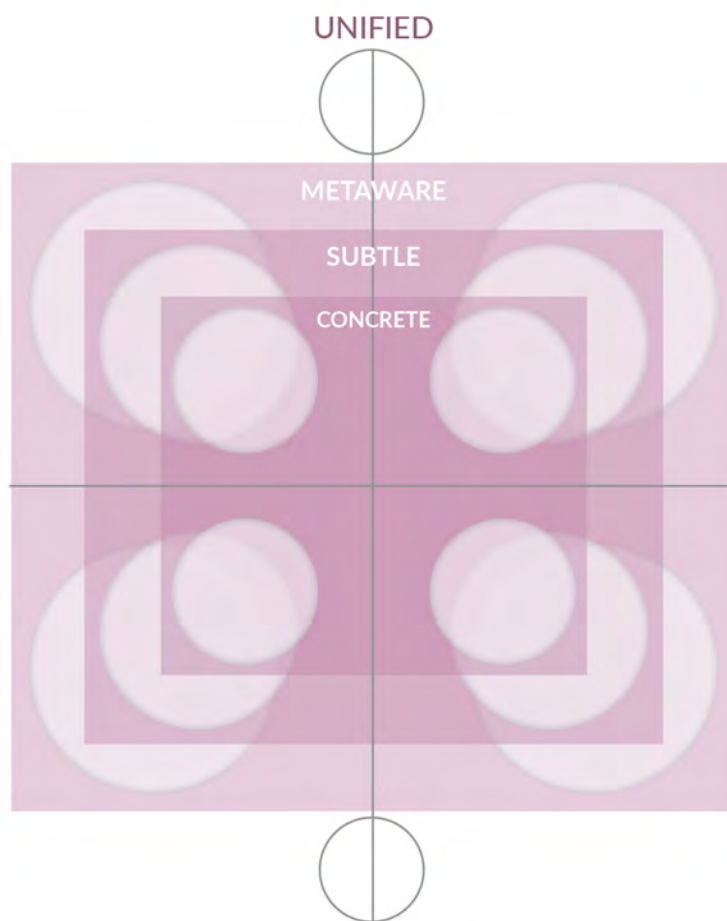


Figure 5. The Integral Sub-Quadrants with Zones

## Concrete Quadrants

These quadrants represent four Concrete stages. The first stage is an Individual stage at the early first person perspective, which we call 1.0. The inside of the circles represent that space. Outside of the upper circles we represent the 1.5 (late first person perspective).

The next stage is a Collective (lower quadrant) stage, 2.0. The inside circle spaces represent 2.0, and the 2.5 stage is represented by the spaces outside of the circles in the lower quadrants.

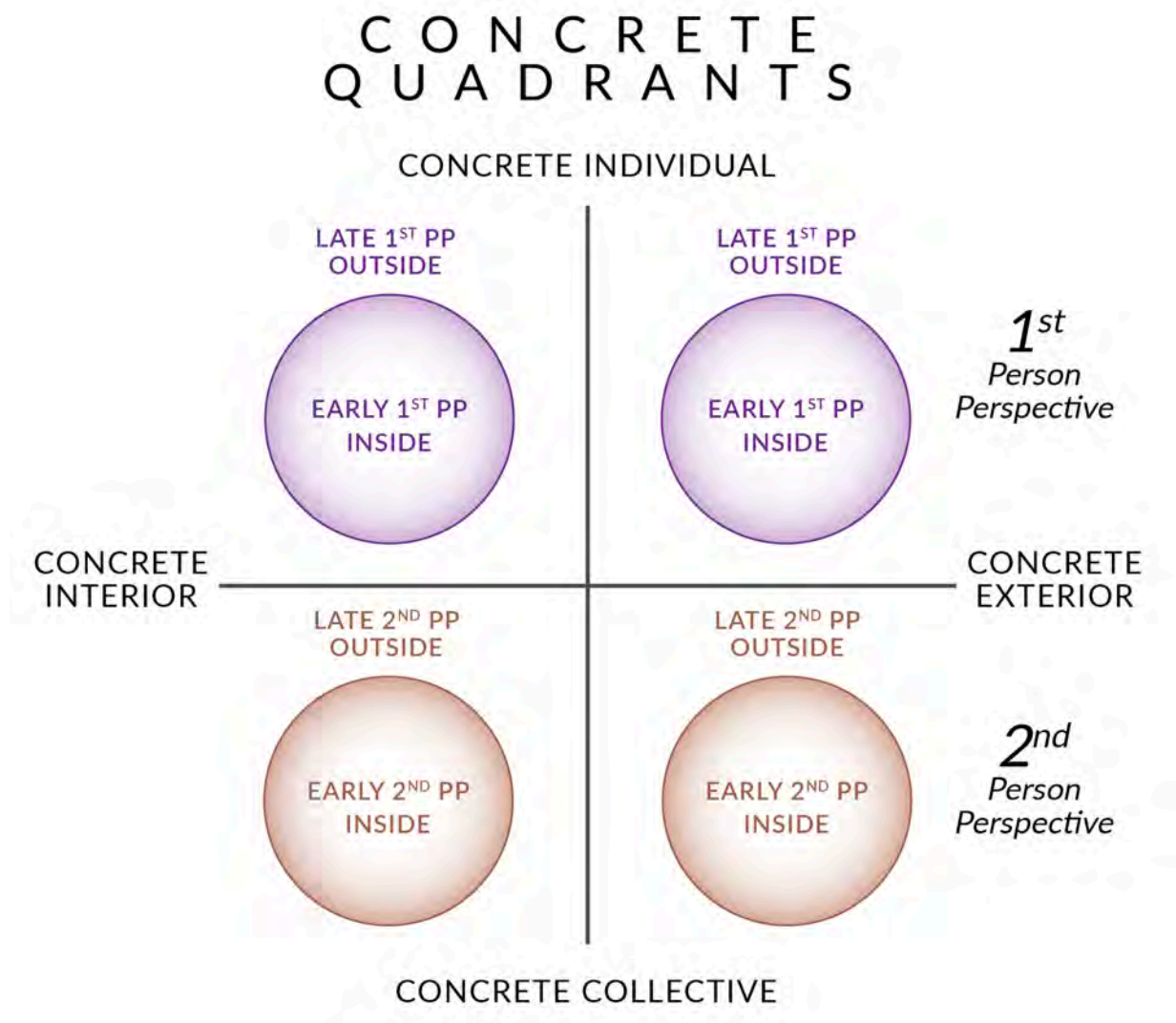


Figure 6. The Concrete Quadrants

## Subtle Quadrants

These quadrants represent four Subtle stages. The first stage is an Individual stage at the early third person perspective, which we call 3.0. The inside of the circles represent that space. Outside of the upper circles we represent the 3.5 (late third person perspective).

The next stage is a Collective (lower quadrant) stage, 4.0. The inside circle spaces represent it, and the 4.5 stage is represented by the spaces outside of the circles in the bottom quadrants.

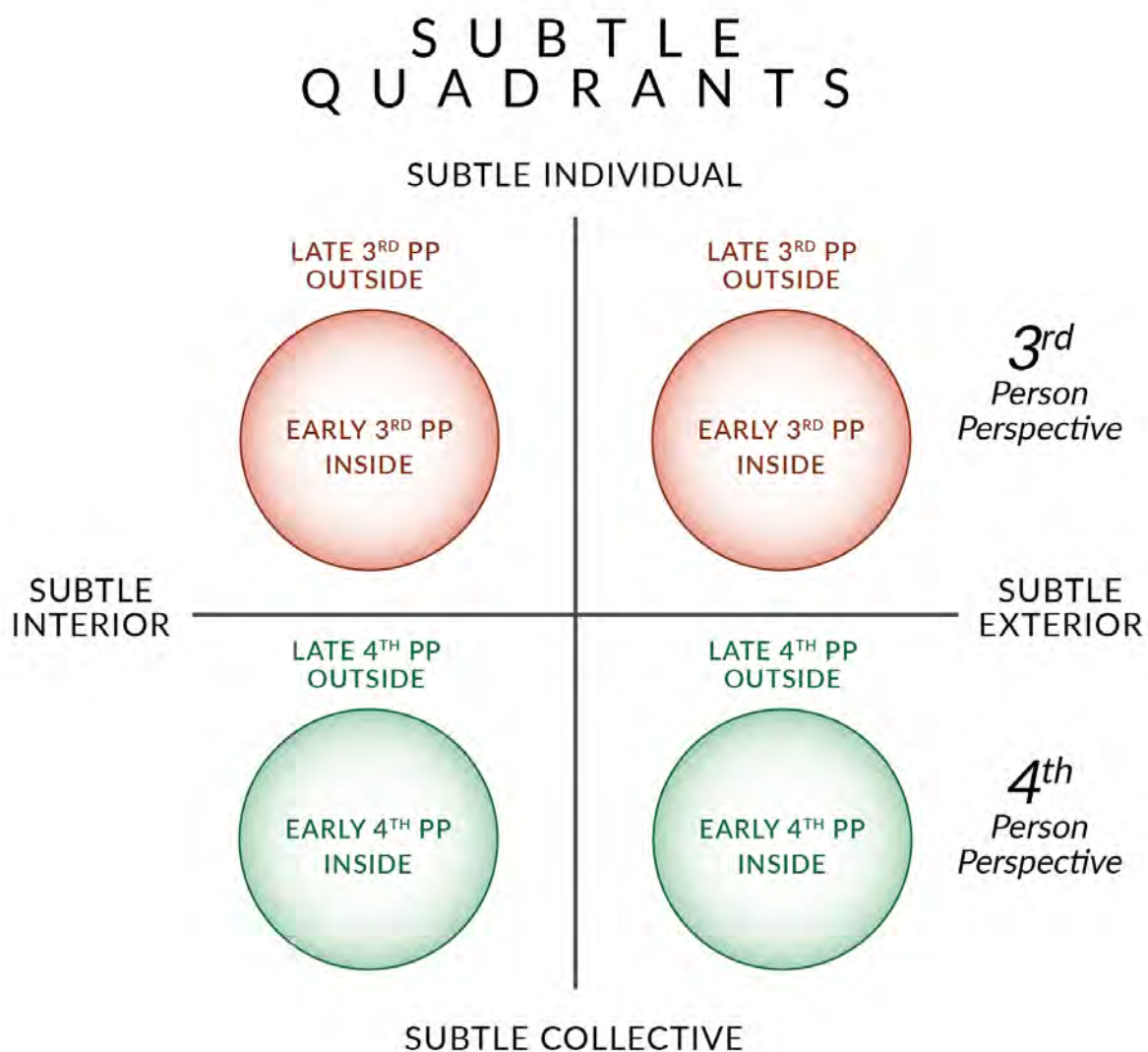


Figure 7. The Subtle Quadrants



## MetAware Quadrants

These quadrants represent four MetAware stages. The first stage is an Individual stage at the early fifth person perspective, which we call 5.0. The inside of the circles represent that space. Outside of the upper circles we represent the 3.5 (late fifth person perspective).

The next stage is a Collective (lower quadrant) stage, 4.0. The inside circle spaces represent it, and the 4.5 stage is represented by the spaces outside of the circles in the bottom quadrants.

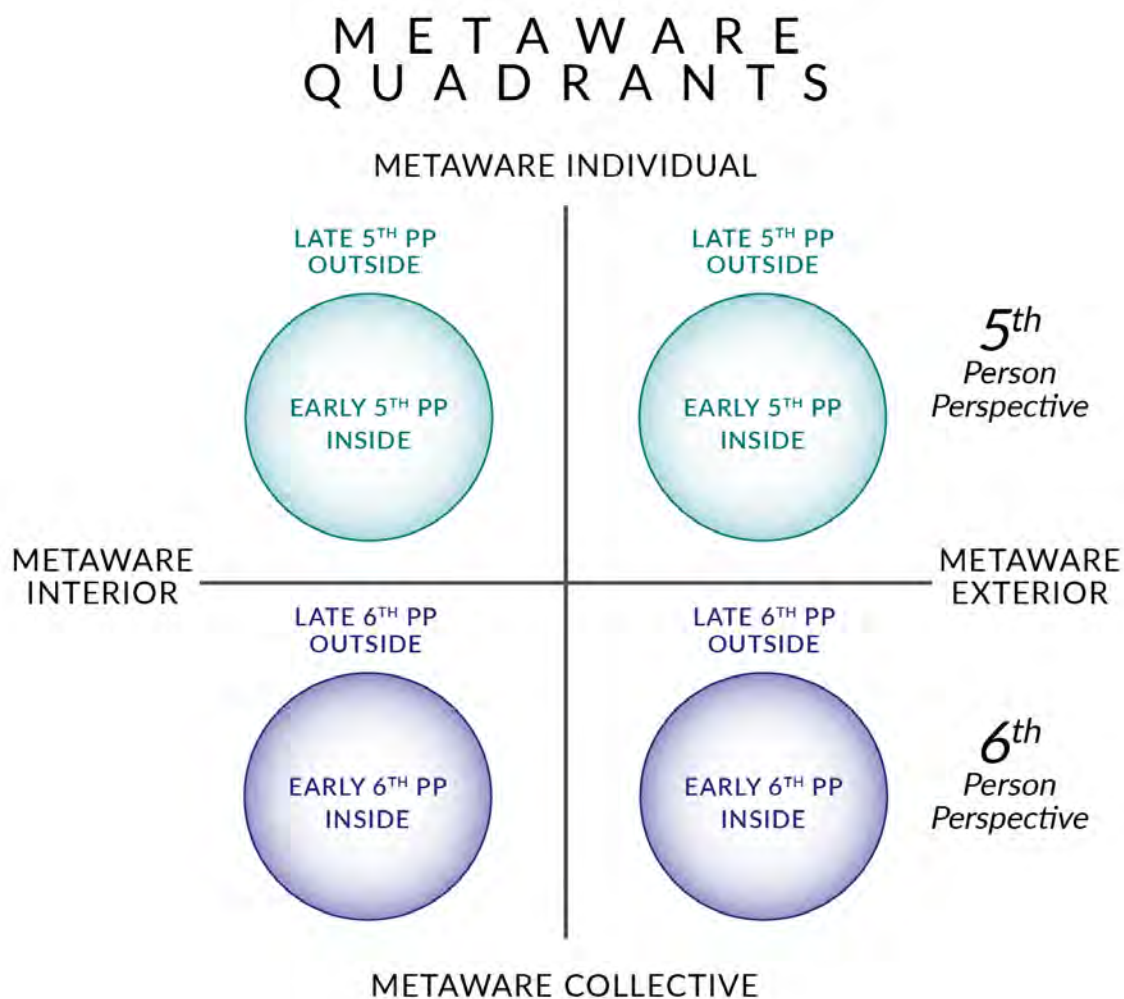


Figure 8. The MetAware Quadrants