Chapter 7

Transforming in Relationship: When Leader–Member Exchange Theory Meets Adult Development Theory

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> Strive first for the wholeness of Creation, and these things will be given to you as well. Do not be afraid, little flock, for it is the Beloved's good pleasure to give you the whole realm.
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> <div align="right">-Luke 12:31–32</div>

1. Introduction

A vital perspective in contemporary leadership research and theory is that leadership is a relational process. This chapter uses a relationship-based approach, known as individualized leadership (IL), to explore leadership contexts in which individual and mutual leadership transformation may occur (Wallis, Yammarino, & Feyerherm, 2011). IL, which is focused on two active participants in a unique, dyadic relationship, grows out of two important views of leadership. It grows from Leader–Member Exchange (LMX) theory, a role-based and social exchange view that holds that the quality of a dyadic leader–follower relationship is predictive of the relationship's outcome (Graen & Uhl-Bien, 1995; Liden, Sparrowe, & Wayne, 1997). It is also anchored in this context by transformational leadership (TF) (Bass, 1985, 1990; Burns, 1978). Highlights of the connections between IL and LMX and TF are discussed, followed by a discussion of how dyadic relationships characterized by high levels of IL are uniquely suited to support leadership development and transformation, including TF as a factor (Kuhnert & Lewis, 1987; McCauley, Drath, Palus, O'Connor, & Baker, 2006). The integration of leadership and spiritual development is considered using both constructive-development theory (CDT) and spiritual stage frameworks. Using the framework developed by O'Murchu (2010), this chapter explores how strong dyadic leadership relationships can support the transformation of leaders along both cognitive (CDT) and spiritual lines of development, thus bridging the head and heart and expanding the reach of wise leaders in our world today.

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2. Leadership as Relationship: Theoretical Foundation

2.1 LMX Theory

LMX theory, with its focus on the dyadic relationship between a leader and a follower, evolved from an earlier prevailing traditional view of leader relationships, the average leadership style (ALS) (Dansereau, Cashman, & Graen, 1973; Dansereau, Graen, & Haga, 1975; Graen & Uhl-Bien, 1995). The ALS approach held that although leaders differ from non-leaders and other leaders, a given leader treats all subordinates consistently and essentially forms the same relationship with everyone in the same work group (Stogdill & Coons, 1957). In contrast, Dansereau et al. (1975) studied differential relationships of superiors and subordinates within work groups, and as a result, developed a view of leadership that allowed for leaders to have the same or different leader–subordinate relationships within a work group. This vertical dyad linkage approach, the forerunner to LMX, suggested that leaders may treat subordinates differently, that is, inconsistently, and therefore they may become leaders for some group members (in-group members) and not for other group members (out-group members). This approach highlighted the importance of focusing on leader–follower relationships, and so the leader–follower relationship began to be considered as a viable unit of study separate from the group per se (Dansereau, Alutto, & Yammarino, 1984; Yammarino, 1990).

The LMX framework supports the study of the dyadic leader–follower relationship with support for three domains: the leader, follower, and the relationship between them. The development of this dyadic relationship is based in role and exchange theories (Graen & Uhl-Bien, 1995; Liden et al., 1997; Uhl-Bien, Graen, & Scandura, 1997). The LMX model describes how effective leader–follower dyadic relationships develop over time and through a role-making process and exchange dynamics.

LMX theory has been used to study dyadic relationships from four perspectives: (1) differences in LMX relationships within groups (in-group and out-group effect); (2) LMX relationships characteristics and their outcomes; (3) a description of dyadic relationship building; and (4) LMX relationships within groups and networks (Gerstner & Day, 1997; Graen & Uhl-Bien, 1995). The first perspective arose from the work described above that suggested that leaders may treat subordinates differently, that is, inconsistently, and therefore they may become leaders for some group members (in-group members) and not others (out-group members). This finding gave rise to the second perspective, that LMX relationships were worthy of consideration as a viable unit of study. The third stage of LMX research, how leader–follower relationships develop, and especially how high-quality leadership relationships develop, is the theoretical focus of interest here.

What are the differences in how high-quality LMX relationships develop over time as compared to low-quality LMX relationships? Higher-quality LMX relationships can be described as those that develop into partnerships, and which have greater levels of mutual respect for the capabilities of the other, anticipation of deep reciprocal trust, and expectation that a mutual obligation will increase with time. They are the more effective and mature leadership relationships and are those in which more effective influence gives rise to more effective outcomes such

as greater reciprocal influence, followers taking more initiative, career risks, and being better organizational citizens (Crouch & Yetton, 1988; Duchon, Green, & Taber, 1986; Fairhurst, 1993; Fairhurst & Chandler, 1989; Graen, 1989). These are the characteristics in a professional working relationship that are key to the quality of the leadership relationship that develops. IL theory, described below, offers insight into how the characteristics of high levels of mutual respect, deep reciprocal trust, and mutual obligation may come about in dyadic leadership relationships. This is the context within which the constructive developmental stages, or action logics, of leaders and their spiritual stages of maturity, will be explored.

2.2 Transformational (and Transactional) Leadership Theory

Researchers generally agree that leaders use both transactional and TF behaviors to different extents (Bass, 1990; Dansereau & Yammarino, 1998). Each is briefly described here.

In LMX theory, the follower is part of an active exchange relationship with the leader who is an active interpreter of follower performance and competence. This exchange relationship is considered a dynamic process, albeit leader-centric, wherein the leader provides rewards in exchange for the subordinate's effort, and therefore both have active roles in maintaining the relationship (Burns, 1978). Although this theory was originally based on the idea of the exchange of tangibles such as pay increases, recognition, promotions, and good performance reviews from the leader in exchange for the follower's completion of tasks and meeting goals, it can also explain the exchange of intangibles such as support for the follower's self-worth (Dansereau et al., 1995). This is the essence of transactional leadership.

Transformational leaders develop their followers by motivating them to achieve goals greater than they previously expected (Bass, 1985). Such leaders expand followers' needs and wants and help them transcend their own self-interests for the sake of their team or organization. Just as these relationships include followers who are willing to change, the TF leader framework assumes also that the leader is willing to change as well (Avolio, Waldman, & Yammarino, 1991). Transformational leader behaviors have been shown to increase trust and commitment of followers and are believed to be essential to well-run organizations that produce positive outcomes (Bass, 1985; Bennis & Nanus, 1985; Burns, 1978; Tichy & Devanna, 1986; Vaill, 1989; Yammarino, 1990, 1996; Yukl, 2001). Key attributes of transformational leaders include holding high performance expectations and providing individualized support, which likely augment the relational dynamics in successful dyads. Their subordinates might describe events where such leaders' inspiration, motivation, or modeling supported their actions and ideas or encouraged them to take appropriate risks. In summary, transformational leader behaviors create meaningful organizational change as they develop followers into leaders while working together to meet organizational requirements and improve organizational performance (Avolio & Yammarino, 2002). Kuhnert and Lewis (1987) expand on the differences between transactional and transformational leaders. For our purposes here, we will consider that leaders at any stage of development may use both transactional and TF, albeit differently (Yammarino & Dansereau, 2002).

2.3 Individualized Leadership Theory

IL theory is a unique formulation that builds on LMX theory, particularly the part concerned with the development of high-quality LMX relationships and includes elements of both transactional and TF. The IL approach holds that successful leaders in dyads characterized by high degrees of IL provide support for their subordinates' feelings of self-worth (Dansereau et al., 1995). The roles of followers in such dyads are of particular interest because of the usefulness of understanding how support for self-worth is perceived and done so over time. Exchange theory generally supports the proposition that superiors support the sense of self-worth of those subordinates whose performance is satisfactory (Berscheid, 1985; Homans, 1961; Stogdill & Coons, 1957). This support for one's sense of self-worth encourages the subordinate to continue performing in ways which the superior deems satisfactory in order to continue gaining such support for the subordinate's self-esteem. Therefore, IL has elements of LMX as well as both transactional and TF, as these involve the dyadic exchange of both tangible and intangible commodities.

The IL approach suggests that subordinates in dyads characterized by IL come to view their superiors as leaders in the initial stages of the relationship if they determine the superior supports their sense of self-worth. This occurs when the follower determines the following three influencing factors are present: (1) feeling safe to reveal personal things (Jones & Archer, 1976); (2) feeling inspired by the leader to do their personal best (Dutton & Aron, 1974); and (3) feeling secure they could approach their superior in situations of ambiguity (Bandura, 1986). This recognition of formally assigned superiors as leaders, and their support for the followers' sense of self-worth, results in the followers contributing satisfying performance. Thus, a subordinate's perceptions of support for self-worth initiate IL in the dyadic relationship (Dansereau et al., 1995; Yammarino & Dansereau, 2002).

As the dyadic relationship evolves past the initial stage, a follower can determine their superior's support for their self-worth by assessing three factors: (1) the degree to which a superior has confidence in a subordinate's integrity, ability, and motivation (House, 1977; Likert, 1961); (2) the degree to which a superior pays attention to a subordinate's needs and feelings (Bowers & Seashore, 1966; House, 1977, 1988; Stogdill & Coons, 1957); and (3) the degree to which a superior supports an individual's actions and ideas (Dansereau et al., 1975). Support for self-worth is reinforced as subordinates contribute satisfactory performance, and leaders respond in ways that further support self-worth. This exchange dynamic provides a feedback cycle that strengthens the perception of support for self-worth (Yammarino & Dansereau, 2002).

Ascertaining support for one's self-worth is a subtle and private process. Furthermore, support for self-worth is not necessarily related to the level of self-esteem of the follower. IL can be in place with individuals regardless of their level of self-esteem, as it is normal for any individual to seek support for self-worth regardless of their current operating self-efficacy levels (Branden, 1998). The essence of IL is that it provides for the empowerment of individuals by supporting them as independent followers who are acting out their own views and ideas (Dansereau & Yammarino, 2000). This can be accomplished with individuals possessing varying levels of self-esteem.

IL is one approach to leadership and is not intended to replace any of the other approaches, for example, supervision skills, task and relationship skills, and TF skills (Dansereau & Yammarino, 2000). For example, IL and TF leader behaviors can be integrated, as Mumford (2000) suggested, such that subordinates' feelings of self-worth can augment a leader's vision so that followers are more likely to transcend short-term difficulties and setbacks.

2.4 High-LMX and IL Relationships as Developmental Spaces

This discussion provides an appreciation for the complementary IL and high-LMX constructs of dyadic leadership relationships and the similarities between these theories relative to characteristics and behaviors of leaders and followers. The characteristics and behaviors of followers and leaders in independent dyads, including mutual respect, reciprocal trust, and mutual obligation support the idea that specific role behaviors and the exchange of tangible and intangible commodities contribute to the development of positive, effective working dyadic relationships. IL contributes to LMX theory by highlighting the importance of the early stage of a new leader–follower relationship by illustrating impactful behaviors and attributes of the follower as they may determine their superior supports their self-worth. This includes determining the leader pays attention to their needs and feelings, has confidence in their integrity, motivation, and ability, and supports their actions and ideas. Early pivotal events such as how the follower came to report to their leader, for example, hired or inherited, provide a crucible in which this determination occurs, thereby contributing to the development of effective leadership relationships.

As these relationships develop over time, they are moderated by individual characteristics of the leader such as acting respectfully and being transparent with the follower, both developing a mutual trust and synergy in working together, and individual developmental factors including supporting the follower's building leadership mindsets and behaviors. Both leaders and followers may benefit professionally and personally from such relationships as this provides a foundation for continued development of both as they make successful organizational contributions at the individual, group, and system levels. Further, transformational leader behaviors augment behaviors in these relationships, strengthening these relationships as places where both the follower and the leader may develop their leadership acumen over time.

The conditions present in high-LMX and IL relationships are naturally conducive to supporting leadership development. The next section describes modern adult developmental stage theory and explores how these characteristics of effective dyadic leadership relationships support leadership development and transformation.

3. Adult Development Theory and its Aim

3.1 The Development of Adult Development

Modern adult development theory itself continues to develop since its beginning early in the twentieth century. The unparalleled contributions of Freud, Adler,

and Jung gave rise to the extensive and rich understanding we have today of how humans develop over the life span. Piaget (1954) contributed enormously to the field with his description of how children develop cognitively through stages marked by increasingly sophisticated ways of making meaning. Early developmentalists understood the ability to reason, a characteristic of adulthood thought to be relatively fixed, to be well developed by late adolescence. Later psychologists including Maslow and Kohlberg contributed with their research on how adults develop from an immature, self-focused view of the world through meaning-making stages that are sequentially more complex, comprehensive, and allow for greater capacity to deal with the challenges of modern life. Kohlberg (1969) described stages of cognitive moral development including his assertion that females generally did not develop to the extent males did. Gilligan (1982), his research assistant, disagreed, her qualitative research suggesting a different stage theory of moral development for females. She held that females enlist a more contextual and relational perspective than males who approach ethical decisions with a concern more for competing rights of individuals and upholding justice.

Loevinger and Wessler (1970) drew on these sources in creating a developmental framework, which gave rise to the Washington University Sentence Completion Test, one of the most widely used and best validated in the field of human development. Loevinger and Wessler's work has been refined by scholars and extended by theorists to include deeper understanding of what changes in development over the lifespan and how development enables an individual to make sense of paradox, complexity, ambiguity, and the many challenges of modern life (Cook-Greuter, 1999, 2004; Kegan, 1982, 1994; Torbert, 1991; Torbert & Associates, 2004). Other scholars have used developmental stage theory to describe and explain development through stages of consciousness (Graves, 1970; Wilber, 2000). Fowler, a colleague of Kegan's, described faith development using a series of faith stages (Fowler, 1981, 1999).

3.2 Constructive-developmental Frameworks

CDT suggests that adults construct the world, or their understanding of reality, through their perspectives that develop over time, to the extent the adult continues learning and growing. What people actively notice, become aware of, describe, reflect on, and ultimately act upon depends on how they understand the world around them. This internal process of making sense of the world gives rise to an individual's values, beliefs, assumptions about self, others, and work. It guides one's awareness, skills and interests, relationships and satisfaction, and life goals. There are identifiable patterns in the increasingly complex meaning-making that takes place at each stage in the developmental spectrum. Thus, CDT can be profoundly useful in understanding leadership and the ways in which leaders develop themselves and create conditions for their colleagues' development.

Leading developmental theorists who have developed constructive-developmental frameworks have important differences among them, although their work each builds on the developmental paradigm from the early pioneers. Kegan used the term "orders of consciousness" (later revising this to "orders

of mind") and emphasized how development occurs over the developmental arc by one making object that which they were previously subject to and doing this with increasing complexity. Cook-Greuter studied stages of ego development, emphasizing an individual's use of doing, being, and thinking as they navigate their lives, potentially using increasingly complex maps. Torbert describes action logics that one may develop through over the lifespan, emphasizing that one's center of gravity, how they understand the world, is both informed by and revealed through their actions. This paradigm captures the real-time, present moment nature of development in relationship to all the influences, relationships, questions, pleasures, and challenges that constitute everyday life.

Each of these three frameworks proposes stages, or orders of mind, or action logics through which an adult may experience continued growth and learning over the lifespan. Each person may develop fundamentally new ways of seeing, understanding, relating to and engaging with life. In these frameworks, each successive stage transcends and includes prior stages, making it possible for an individual to respond from an earlier action logic, or stage, depending on the present moment situation and the individual's conscious and/or unconscious logics. Put succinctly, one's mindset drives one's action, which results in the outcomes or affects one produces. Such a developmental arc significantly informs an individual's ability for a deeper understanding of more dynamic worldviews, thus allowing for the expanded capacity to problem solve and act with wisdom and effectiveness in the world (Cook-Greuter, 2004). While each theorist discussed here has named slightly different stages in constructive-developmental lines of development, each identifies a sequence of developmental stages across the lifespan that depict important patterns in the ways adults mature such that how they interpret their experiences and understand the world grows increasingly complex. Table 1 shows the frameworks of Kegan, Cook-Greuter, Torbert arranged so that parallel stages of develop appear on the same line. O'Murchu's spiritual framework is also included in Table 1.

These three frameworks are used extensively in organizations as part of leadership development programs and executive leadership coaching projects. They are used to assess and create spaces for the transformation of leaders, teams, and organizations through coaching and consulting processes which themselves can evolve to be increasingly transforming and collaborative. These frameworks support single-, double-, and triple-loop learning and change: achieving performance goals, changing strategies which drive those goals, and changing the way the system sees and understands its challenges, respectively. As individuals, dyads, and groups transform to a later stage or action logic, they have an expanded capacity to deal with ambiguity and to harness paradoxical tensions, essential for leading change sustainably (Wallis & Emerson, 2019). Leadership development programs that teach leaders the power in both/and thinking support their transformation into leaders that can hold and harness the tension in seeming opposites such as plan/control AND flexibility/emergence, winning/achieving AND learning/growing, and focusing on the goal AND seeing the wider picture (Emerson & Lewis, 2019). Emerson and Lewis offer a method for leaders to find a third way, a place where the benefits of both poles can be harnessed, and the downsides of both poles can be minimized. Such leaders, those who can lead others in finding and operating

Table 1. Constructive-Developmental Frameworks.

% of US population (est.)	Kegan's Orders of Consciousness (1994)	Cook-Greuter's Ego Development Stages (2004)	Torbert's Action Logics (2004)	O'Murchu's Life Stages (2010)
3%		6 – Unitive	Ironist	Universalizing faith
		5/6 – Construct-aware	Alchemical	
12%	5 – Interindividual/ Post-modern	5 – Autonomous	Transforming	Coming home time
		4/5 – Individualist	Redefining	Conjunctive
75%	4 – Institutional/ Modern	4 – Conscientious	Achiever	Individuative-reflective
	3 – Interpersonal/ Traditional	3/4 – Self-conscious	Expert	Synthetic-conventional
		3 – Conformist	Diplomat	Mythic-literal
10%	2 – Durable categories	2/3 – Self-defensive	Opportunist	Intuitive-projective
	1 – Perceptions as reality	2 – Impulsive	Impulsive	Primal faith

Sources: Adapted from Cook-Greuter (2004), Kegan (1994), Torbert (2004), and O'Murchu (2010).

from this third way, typically operate from later stage action logics, and are better able to create and sustain supportive developmental environments for others.

3.3 Development Toward What Aim?

Developmental psychology and leadership development theory have brought significant benefit to those who lead in organizations, who are accountable for managing unrelenting challenges in complex organizational systems, all while creating and sustaining organizational cultures that sustain developmental spaces. I have used the scholarly work of Kegan, Cook-Greuter, and Torbert, and the leadership assessments based on each of these three developmental frameworks in executive leadership coaching and organizational consulting across sectors, in facilitating PhD dissertation committees, in designing and teaching undergraduate and graduate leadership courses, and in exploring emergent possibilities using these frameworks at academic conferences, industry and organizational meetings, and in smaller fellowship gatherings. Having worked with some of the other authors in this volume, this author has first-hand experience with the transformational potential in using these frameworks and the assessments and methods derived from them. Supporting adult development in the contexts of business and educational institutions is vitally important work, to the individual, the organizational system, and society.

Inherent in the developmental journeys undertaken in the work that transforms leaders, leaders are asked to reflect on their purpose, their passion, and to understand their gifts and developmental opportunities in more integrated ways, and in ways more aligned with larger shared purposes (Herdman-Barker & Wallis, 2016). Leaders at later stages of cognitive development have an increased capacity to take in more complexity – cognitively, affectively, and interpersonally – and can understand earlier ones because they have gone through them. Leaders in dyads where both operate from later cognitive stages may experience overlapping fields of development and thus be better positioned to experience and recognize new knowledge about leading, following, and learning itself in their organizational context (Wallis, 2013).

And yet, the spiritual dimension of being human has been the often-neglected element in this century-long evolution in the way we generally understand and apply what is understood about adult and leadership development in business and academic contexts. There have been developmental psychologists and others whose work focuses on the spiritual element including Wilber (2000), O'Fallon (2015), and O'Murchu (2010). Recent work in fields such as neuroscience, epigenetics, and mind-body connection are narrowing the gap between the Western mind's seeming preference for rationality over mystery. What some consider the rational/infinite, or secular/sacred divide is being reconsidered practically wherever one looks. Reams' (2012) work underscores the value of leading through the heart as he integrates work by Scharmer, McCraty, and others who establish a link between leadership and the presencing and knowing of the heart.

As potentially powerful as these stage theory frameworks, and the interventions they give rise to are, the challenges we currently face require the transformation of hearts as well as minds. We have made a world in which we are facing unprecedented levels of economic and social disparity, widespread racism and violence, irreparable damage to global climate, and the associated levels of pain, suffering, and trauma they create. Our global fates are connected as we face the interconnected challenges of climate change, contamination of the food supply, the animal holocaust, and the rise of authoritarian/disempowered mindsets. Each of these catastrophes requires a transformation of heart as well as mind for us to create a world amenable and sustainable for human living.

Martin Luther King (MLK), Jr.'s words, as timely now as when he spoke them 52 years ago, capture this urgency. He said,

> We can no longer afford to worship the god of hate or bow before the altar of retaliation. The oceans of history are made turbulent by the ever-rising tides of hate. History is cluttered with the wreckage of nations and individuals that pursued this self-defeating path of hate …. We are now faced with the fact that tomorrow is today. We are confronted with the fierce urgency of now. In this unfolding conundrum of life and history there is such a thing as being too late. (King, 1967)

Thus, a timely question in leadership development is development toward which aim? This chapter posits that leadership development, if it is to respond

most meaningfully, and in liberating, life-giving ways to the challenges of our day, necessarily includes a spiritual dimension. CDT holds that leaders operating from later stages are more able to see in more flexible ways and are likely to understand the challenges we face with more self-awareness about limitations in the ideologies that formed their worldviews. However, later stage leaders are not necessarily seeing the world from a later spiritual stage.

Incorporating a spiritual developmental arc allows us to consider adult maturation in additional ways, in ways that serve to narrow a gap between matters of the mind and movements of the heart. To explore this approach to appreciating a broader developmental map, the work of Jesuit priest and social psychologist Diarmuid O'Murchu is used in concert with the constructive-developmental frameworks upon which it rests, and which have already been discussed.

4. Spiritual and Constructive-Development in High-LMX or IL Leader Dyads

4.1 High-LMX or IL Leader Dyads as Ideal Developmental Spaces

The attributes of high-LMX and IL leader dyads, namely significant levels of trust, safety, goodwill, respect, and mutuality, are conditions that are conducive to leader learning and development. Mainstream approaches to leadership development and transformation typically involve creating an individual development plan comprised of a handful of development goals and steps to be taken to achieve them. They often include goals such as enhancing one's confidence and executive presence and influence, developing leadership behaviors in subordinates, and managing polarities such as the need to focus well on both process and outcomes. However, leadership development can be positioned in relation to the development work relevant to each leader in a leader dyad. This chapter advocates that both cognitive and spiritual development be considered in the development of leaders that seek to transform in wisdom and its application to challenges we face in this century.

In such relationships, the internal work of transformation, often the work of both the heart and mind, is more likely to be mutually engaged and effectively pursued. Both the leader and the follower are more likely to take appropriate risks, such as those called for in dealing with polarities and paradox, when they can try out new courageous and creative behaviors, ask paradigm-challenging questions with the benefit of collegial support. Such learning-rich environments are more likely to allow for what Rohr (2019) calls the third way, or the space where two seemingly opposing perspectives or positions can be explored and potentially held in harmony. Leading from the third way calls for humility, vulnerability, and love. Such behaviors can include developing the inner capacity to being vulnerable, releasing the need to control another, or willingness to look at a repeating pattern that no longer serves. Such transformational learning does not mean denying what is going on or giving up on one's goals. It has to do with exploring the undercurrents in the heart that create suffering, such as holding onto wanting things to be different, defending one's view with a mind closed to others' view, or viewing another as primarily an obstacle to one's peace (Emerson & Lewis, 2019).

While this work of the heart can be thought of as having a spiritual nature, it does not belong to a specific religion. It speaks to a presence of heart in which we are willing to see a situation or a relationship not only with one's ego but also with one's spirit. It is where the transformation to a more compassionate or wise stance can grow. It is the work wherein we grow in freedom, in wisdom, and in love from the difficulties we face. Thus, it is not necessarily dependent on the specific religious practices of either member of the leader dyad. In the next section we use O'Murchu's developmental typology of spiritual stages, non-religion-specific, to see how they evolve over the lifespan. This developmental framework is a structure for spiritual maturation and as such, it pertains to how and why one believes in God, Creator, Source, or Divine. It does not pertain to content, which is what one believes such as specific ultimate beliefs or values.

It is also important to note that an individual could operate from a different spiritual stage than that of their action logic. An interesting developmental task could be to explore one's spiritual stage and one's action logic in relation to each other, and to think about a time when the interaction between the two was particularly alive. One might ask oneself, what spiritual practices or patterns supported my growth in either line of development, spiritual, or cognitive? Where did transformation in one line of development support transformation in the other?

Development in high-LMX and IL leader dyads can be profound given that both the leader and follower may be engaged in transformational learning, and so, their deep conversations can enrich each of their insights, creativity, and confidence in running various developmental experiments. One is reminded of Einstein's idea that his best creative thinking occurred in his conversations with others. This is one example of his idea of combinatory play, which he said seems to be the essential feature in productive thought. He said that the combination of worldly wisdom, perspective, accumulating existing ideas, failures from multiple disciplines, all occurred naturally in conversation with another (Einstein, 1947). Thus, the dyadic relationship characterized by high-LMX or IL can be a most fertile place for new ideas to be developed, challenged, and to be harnessed for growth in matters both cognitive and spiritual, such as are required in psychological shadow work, polarity management, and the critical task of building trust in relationships.

4.2 O'Murchu's Adult Faith Development Typology

O'Murchu has adapted Fowler's and Cook-Greuter's work in creating his typology of spiritual faith stages across the adult lifespan. Fowler, a contemporary of Kegan's, built also on Piaget and Kohlberg's work in his six-plus-one stage developmental process describing how an adult may develop in their spiritual beliefs over the lifespan (Fowler, 1981, 1999). Fowler held that faith is the process of constitutive-knowing, that it underlies a person's composition and maintenance of a comprehensive frame of meaning. He said this process generated from the person's attachments or commitments to centers of supra-ordinate value which have power to unify their experiences of the world and thereby give significance to their relationships, contexts, and patterns of everyday life (Fowler, 1981). His research included participants of multiple faith traditions and contributed a

developmental map that coincided with Kegan's developmental framework. This major contribution is the foundation for O'Murchu's more recent work in which he delineates eight stages of spiritual development (Table 1). A brief description of each stage is offered below.

Central to O'Murchu's approach to spiritual development are ideas that differ from what some would consider traditional religious views. These include that we are co-creators with our Creator (later stage view), and that the patriarchal sky-God (earlier stage view) is replaced, through development, with the Divine life-force we encounter in the miracle of God's creation. A hierarchical top-down dependency (earlier stage view) is replaced, given development over the lifespan, with a sense of mutual equality and interdependence. Parental-type controlling relationships are replaced, through spiritual development, with a view that is more based on mutuality. A mentality in which everything is predetermined is replaced with a process outlook that respects the divinely inspired evolutionary nature of life. Further, spiritual communities where the power and control traditionally come from the top (priest, imam, rabbi) are replaced with those centered on people and focused on mutual empowerment.

Several principles undergird O'Murchu's spiritual faith development typology. First, he sees faith and spirituality as a process of life-long learning, not some magical, divine product bestowed by church or religion. Spiritual development occurs when attention is paid to it as it depends on grace as well as one's nature. The learning that accompanies spiritual development for adults is supported in interactive and cooperative engagement in which educator and learner are equal partners. An underlying value is that all adult learners are endowed with wisdom and all are beneficiaries of Divine revelation. Both educator and learner have joint responsibility for the awakening and appropriation of their spirituality. O'Murchu identifies story-telling as a central strategy in articulating a meaningful faith and help develop discernment skills. He holds that adult spirituality matures when life experience is honored, and the ensuing challenges are explored through mature adult conversations. He sees adult spirituality much more at home in soulful realism in which paradox is honored, vulnerability is protected, questions are respected, and dogmatism gives way to trust and dialogue. Thus, it is no surprise that adults who commit to Spirit-based structures are those in which power is shared equally and justly at the service of empowerment. Finally, he holds that adults desire transparency through open dialogue, pursuing truth that is always in the process of being realized. Adults seek to change co-dependent images and language into more imaginative and intuitive constructs that challenge people to act as adults, faithful to an adult God, modeled on the adult life example of Jesus (O'Murchu, 2010).

These principles reflect values that are shared by CDT frameworks and resonate with the qualities of high-LMX and IL leader dyads: learning is supported in environments of openness, transparency, egalitarity, justness, each human possesses a spark of the Divine, experience and sharing it is valued, and dialogue is key to development in relationship.

Following are brief descriptions of each of the eight stages in O'Murchu's spiritual developmental map.

Primal faith – Security, trust, and safety depend on the environment. If consistent nurture is experienced, one is likely to develop a sense of safety and trust in the universe and the Divine. At this spiritual stage, the person's experience drives their religious sentiment, largely subconsciously. Typically ages 0–2.

Intuitive Projective – Task is to discover the natural world and learning cultural ways. Gift is wonder. One's worldview is concrete and situational, with the focus on self. Like the Opportunist, when they show empathy, it is often imitated. Physical consequences to the self are the most important criteria for determining right from wrong. The person is learning through experiences and impressions of the world, and the people in it, often accompanied by strong emotions. Understands punishment and reward as key features. Typically ages 2–6.

Mythic-Literal – Task is creating a secure and authentic social self. Center of gravity is peer group, sex, and society. The person can distinguish between fantasy and reality. Opinions are drawn quickly, as in a person judges the person who is different from them. Perhaps like the Diplomat in Torbert's action logics, the assumption is made that the other person has the same needs as themselves, so they objectify the other. The person at this stage holds a strong belief in the justice and reciprocity of the universe, and so sees God as a cosmic judge who guarantees simple and reciprocal *fairness*. Deities are almost always anthropomorphic. Metaphors and symbolic language are often understood literally, hence often misunderstood. First time a person can consciously take on an inherited faith tradition. This gives rise to the challenge of saving childhood and keeps adulthood at bay, lest unsolvable contradictions arise. Typically ages 6–12.

Synthetic-Conventional – Honoring the rebel is a big challenge. Many adults remain at this spiritual stage their whole lives. Like the Expert in CDT, there is a tension – in this case it is between conforming to authority by having a religious identity that is approved of, and, ignoring conflicts in beliefs when they arise because any inconsistencies are experienced as threatening. This can give rise to a love-hate relationship with those viewed as authority when it comes to religious beliefs and how they influence their opinions. A person holds a fractured set of beliefs although they may not be aware that this is operating as their system of beliefs or *agreements* they expect to be met. They try to see the spiritual worldview of another through that person's perspective because what others think of them is important, so committing to certain values has an interpersonal dimension. God may be experienced as their good friend. Typically ages 12–20.

Individuative-Reflective – Task is learning delivery systems and embodying one's soul in culture. The gift is action and inspiration. Like the Achiever, the person at this stage has the capability to reflect on one's belief system and can do so in the context of expectations regarding work, relationships, and their social systems. Questions of meaning tend to be suspended or suppressed, but when engaged, can give rise to a more open exploration of a meaningful spirituality in which one takes responsibility for their beliefs and feelings. This could include letting go of previously held mythologies that they used to hold their belief system together. This could also result in increased awareness of conflicts in one's belief system, which could result in rejecting religion. Typically ages 20–35.

Conjunctive – Task is creating and manifesting innovative delivery systems for soul work. This is a time of transition, of exploring paradox, of an alertness to the dynamics of polarities, and even letting go of beliefs once strongly held. A person at this stage is likely showing the Redefining action logic, aware of the need for multiple interpretations of reality. These adults are able to live with ambiguity such as there being multiple understandings of God. At this stage, adults can follow their spiritual beliefs and be open to new understandings that resolve conflicts they held at earlier stages. This may result in a new, complex understanding of a multidimensional truth that cannot be simply explained. O'Murchu indicates that this time of significant spiritual adjustment may occur for females around the time of menopause. Persons of any gender may begin to seek a mature faith, which could mean they change churches or religions. Typically ages 35–55.

Coming home time – Task is caring for the soul of the more-than-human community. Gift is wholeness. They see the web of life. The development underway in the Conjunctive stage takes root and can result in one of three possible religious outcomes: (1) return to a conventional practice; (2) reclaim an agnostic or atheist stance if even privately; and (3) embrace a more *universal sense* of spiritual awakening. Like the Transforming action logic, the person at this stage may be making new adjustments, even though they need to develop through this stage to be fully certain how to accomplish them. Typically ages 55–70.

Universalizing faith – Late elderhood, or Sage, or Alchemical stance. With the gift of grace, this person is centered in Spirit and their focus is tending the universe, as they are interested in the health of all species. They would tend to treat any person with compassion, love, and justice. They understand themselves as one of many, part of an ultimate unity. This may be seen as an altruistic, life-affirming, deep sense of gratitude for all that is, no matter the circumstances. Or, the person at this stage could be fearful at the prospect of meeting God in death thus opting for what they perceive as a safe, conventional approach to faith. This very rare stage could be what Gandhi, Mother Teresa, or MLK, Jr. experienced. Typically ages 70 and older.

How a leader's spiritual journey gives coherence and direction to their lives, what their framework is for understanding God, or the Divine, or Higher Being, and how that understanding influences their core values, beliefs, relationships, and their participation on social levels is likely to have a deeply formative influence on their leadership. Their spiritual stage grounds their personal stances, loyalties, and how they relate to larger frames of reference. A leader's spiritual stage may deeply influence how they face and deal with the challenges of human life, both within and outside the corporation. What gives their lives their ultimate meaning will surely influence their relationships, how they understand and manage polarities, and how they enact their and their organization's values especially in times of tension and difficulty.

It bears repeating that while there is an elegant alignment between O'Murchu's spiritual development map with the CDT frameworks, not surprisingly given their connected origin, a person may be operating from one spiritual stage and from an earlier or later constructive developmental stage. For example, a vice president of a research division in a global biopharmaceutical company may be leading

consistently using a Transforming action logic, engaged in leading complex change and managing all manner of ambiguously defined relationships and corporate pressures. This same vice president may also be undergoing all the exploration characteristic of spiritual maturity at the Individuative-Reflective stage, and perhaps even be on the cusp of seeing their colleagues as part of an interconnected whole wherein all the good they effect helps them all, or, on the cusp of dropping all but the basest understandings of good as part of the world order. This latter alternative could result in a narrower understanding of possibilities and motivation in how they approach the less defined aspects of their responsibilities.

As with transformation from one constructive developmental stage to the next, development along the spiritual structure occurs from dissatisfaction or inadequacy with the current stage, or, attraction from the potentialities sensed at a later stage. This chapter makes the case that paying attention to spiritual development is an important part of leadership development because the nature of the challenges leaders face require they employ the wisdom of their hearts as well as their minds. The development of spiritual maturity as described in this framework is not tied to any one religion or belief system. This is another reason O'Murchu's spiritual framework can be useful in present-day transformation in leader dyads where people of different religious faiths work side by side. The next section offers several examples of what mutual, mature, liberating, life-giving development might look like as both leader and follower experiment with creative and courageous responses to the lure of the Divine – in both secular and spiritual terms.

4.3 Spiritual Development in Specific Faith Stages Using Real Business Examples

Organizational leaders develop along multiple lines of development. This chapter explores two of them, the constructive developmental and spiritual lines of development. This section offers two examples of development in leader dyads characterized by high-LMX or IL and where consideration for both leader and follower stages of development are given.

4.3.1 Case 1. Oliver is Senior Vice President of Sales at a global biopharmaceutical firm, leading from the Transforming action logic. Reporting to him is Brenda, Senior Director of Commercial Products. Brenda usually leads from the late Achiever mindset and Conjunctive spiritual stage. She frequently finds herself reflecting on the broader effects of her department's culture and ways of bringing product to market even as she is quite skilled at achieving deadlines in how she works through obstacles. She makes sense of her tussles with Oliver as that she is exploring a closer alignment between her work life and her inner life, and perceives Oliver as living from the earlier spiritual stage of the Synthetic-conventional. Oliver occasionally refers to God, and when he does it is as an authority figure that is mostly irrelevant to his experiences at work and certainly uninterested in how he leads his department. Whenever Brenda initiates conversations with Oliver about matters pertaining to department culture, including the stressors and obstacles created from deep divisions in how decisions are made, cliques involving in- and out-groups with Oliver, and questionable ethical

practices, she finds herself running up against vital differences in the ways she and Oliver understand and enact essential leadership values. With their different stages of spiritual development, it will likely be quite difficult for them to significantly narrow the gap between Oliver's and Brenda's approaches to the gray areas where lived leadership values overlap with their spiritual values.

4.3.2 Case 2.   Roger is the President of a stand-alone 300-bed hospital located outside the city limits of a large metropolitan city. Enjoying his Coming Home Time spiritual stage, he is 70 years old and considering retirement within the next couple of years. He anticipates expanding his involvement with his faith community and spending more time participating at contemplative retreats. He leads from the Achiever action logic and has enjoyed a long run of successes in leading this hospital. However, Justin, his Vice President of Finance, has been a challenge since shortly after Roger hired him. Justin's center of gravity is also the Achiever action logic, and he currently experiences his spirituality at the Individuative-Reflective stage, so he is not especially drawn to exploring challenges at work from a stance that includes his deeper questions of life. Even though Roger is at a later stage spiritually, he struggles to have the tougher conversations with Justin about troublesome areas that continue to show significant variation in the financial reports. Even though the overall monthly financial results are good, areas that show signs of potential mismanagement, such as the inventory reporting for materials delivered at the loading dock, should be raised by Roger in his 1:1 meetings with Justin, but Roger's stance is one more of forgiveness than holding Justin accountable for inspecting this area of operations and putting any necessary control measures in place. Justin is satisfied with the consistent strong financial results and doesn't show interests in taking initiative toward pursuing this questionable area. They seem to each be satisfied with the status quo, avoiding tough conversations, Roger given his preference for forgiveness over toughness, and Justin given his preference for results over process. Perhaps if Roger were operating from a later action logic, and/or Justin from a later spiritual stage, such tough conversations might be more likely for one of them to initiate.

5. Conclusion

Transcending the old distinction between the secular and the sacred, leadership development and transformation needs to incorporate a spiritual component if we are to cultivate leaders who can use the wisdom of their hearts along with the genius of their minds in addressing the conflicts and fragmentations we are experiencing in our world today. As our present-day challenges require us to stretch and integrate our heads and hearts to address them, so should our leadership transformation efforts include both the cognitive and spiritual developmental knowledge and approaches. High-LMX and IL leader dyads offer uniquely fertile spaces in which to undertake this important leadership development work. Within such supportive crucibles of potential leadership development, we have an increased likelihood of tapping the much-needed wisdom of our hearts in tackling the challenges we face today. This approach will help us ask, and respond to, the questions we face today: How do we translate our spirituality into structures

and behaviors that can transcend the addiction to the toxic use of power? How do we develop spiritually so as to mobilize leaders to participate in empowering and liberating ways? How do we support spiritual development in ways that are life-affirming and support leaders in becoming more whole? These are some of the questions raised by this exploration into these two phases of leadership development: that of the leader's head and heart. And it is such explorations that may help us realize the promise in the opening quote, that our loving Creator has given us the capacity for wholeness across our expansive, beautiful, global realm.

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