Introduction to
The Intelligent Social Change Journey[1]

The Intelligent Social Change Journey (ISCJ) is a developmental journey of the body, mind and heart, moving from the heaviness of cause-and-effect linear extrapolations, to the fluidity of co-evolving with our environment, to the lightness of breathing our thought and feelings into reality. Grounded in development of our mental faculties, these are phase changes, each building on and expanding previous learning in our movement toward intelligent activity.

We are on this journey together. This is very much a *social* journey. Change does not occur in isolation. The deeper our understanding in relationship to others, the easier it is to move into the future. The quality of sympathy is needed as we navigate the linear, cause-and-effect characteristics of Phase 1. The quality of empathy is needed to navigate the co-evolving liquidity of Phase 2. The quality of compassion is needed to navigate the connected breath of the Phase 3 creative leap. See the figure below.
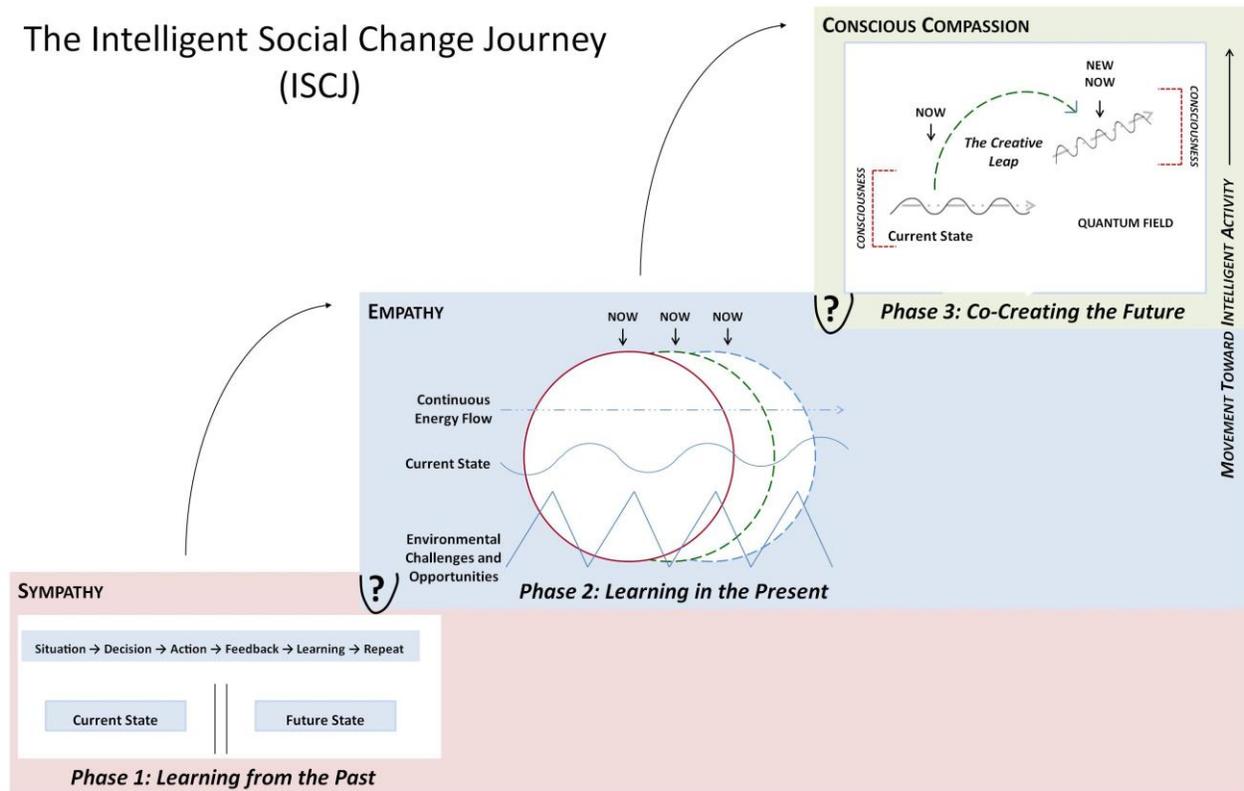

Figure Intro-1. *The Baseline Model.*

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[1] This Introduction to the Intelligent Social Change Journey is excerpted from Part I of Bennet, Bennet, Shelley, Bullard and Lewis (2017). *The Profundity and Bifurcation of Change*. Frost, WV: MQIPress. The book (in five Parts) is available on Amazon (in Kindle format) and from www.MQIPress.net (in PDF format).

In the progression of learning to navigate change represented by the three phases of the ISCJ, we empower our selves, individuating and expanding. In the process, we become immersed in the human experience, a neuronal dance with the Universe, with each of us in the driver's seat selecting our partners and directing our dance steps. Let's explore that journey a bit deeper.

In Phase 1 of the Journey, *Learning from the Past*, we act on the physical and the physical changes; we "see" the changes with our sense of form, and therefore they are real. Causes have effects. Actions have consequences, both directly and indirectly, and sometimes delayed. Phase 1 reinforces the characteristics of how we interact with the simplest aspects of our world. The elements are predictable and repeatable and make us feel comfortable because we know what to expect and how to prepare for them. While these parts of the world do exist, our brain tends to automate the thinking around them and we do them with little conscious effort. The challenge with this is that they only remain predictable if all the causing influences remain constant ... and that just doesn't happen in the world of today! The linear cause-and-effect phase of the ISCJ (Phase 1) calls for sympathy. Supporting and caring for the people involved in the change helps to mitigate the force of resistance, improving the opportunity for successful outcomes.

As we expand toward Phase 2, we begin to recognize patterns; they emerge from experiences that repeat over and over. Recognition of patterns enables us to "see" (in our mind's eye) the relationship of events in terms of time and space, moving us out of an action and reaction mode into a position of co-evolving with our environment, and enabling us to better navigate a world full of diverse challenges and opportunities. It is at this stage that we move from understanding based on past cause-and-effect reactions to how things come together, to produce new things both in the moment at hand and at a future point in time.

Phase 2, *Learning in the Present*, takes us to the next level of thinking and feeling about how we interact with our world, including the interesting area of human social interactions. Although complex, the somewhat recognizable patterns enable us to explore and progress through uncertainty and the unknown, making life more interesting and enjoyable. In Phase 2 patterns grow into concepts, higher mental thought, and we begin the search for a higher level of truth. Sustainability in the co-evolving state of Phase 2 requires empathy, which provides a direct understanding of another individual, and a heightened awareness of the context of their lives and their desires and needs in the moment at hand. While not yet achieving the creative leap of the intuitional (represented in Phase 3), we are clearly developing higher mental faculties and instinctive knowledge of the workings of the Universe, which helps cultivate intuition and develop insights in service to our self and society.

The creative leap of Phase 3, *Co-Creating the Future*, requires the ability to tap into the larger intuitional field that energetically connects all people. This can only be accomplished when energy is focused outward in service to the larger whole, requiring a deeper connection to others. Compassion deepens that connection. Thus, each phase of the Intelligent Social Change Journey calls for an increasing depth of connection to others, moving from sympathy to empathy to compassion.

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INSIGHT: **Each phase of the Intelligent Social Change Journey calls for an increasing depth of connection to others, moving from sympathy to empathy to compassion.**
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The ISCJ Baseline Model accents the phase changes as each phase builds on/expands from the previous phase. As the journeyer moves from Phase 1 to Phase 2 and prepares for the creative

leap of Phase 3, the mental faculties are developing, the senses are coming into balance, and there are deepening connections to others. This will feel familiar to many travelers, for this is the place where we began. The model shows our journey is a significant change of mind, body and spirit as we operate on different cognitive and emotional planes as we progress through the developmental phases. Some people are aware of the changes they are undergoing and seek to accelerate the learning, while others resist the development, hoping (perhaps somewhat naively) to simplify the way they interact with the world.

Babies are born connected, to their mothers and families, and to the larger energies surrounding them and within them. This represents Phase 3. As one author exclaimed when exploring this reversal of the Phase 1, 2 and 3 models, "This really brings it all together for me. There is something that we admire in babies that we would like to become, and this framework makes sense of that feeling." If, and when, we return to Phase 3 in the round-trip journey of life, it will be with experience in our backpack and development of the mental faculties under our cap.

Sometime around the fourth grade, as most grade school teachers will attest, the ego pokes its head out, and, through social interactions, the process of individuation has begun, with a focus on, and experiencing in, the NOW. This represents Phase 2 of our change model, a state of co-evolving. In the pre-adolescent child, intuitional connections are subsumed by a physical focus accompanied by emotional flare-ups as the child is immersed in learning experiences, interacting and learning from and with their environment.

By the time the mid-teens come around, the world has imposed a level of order and limits, with a focus on cause-and-effect. In some families and cultures this may take the form of physical, mental or emotional manipulation and control, always related to cause-and-effect. If you do that, this will happen. For others, cultural or religious aspects of expectations and punishment may lead to the cause-and-effect focus. For the mid-teen perceived as overactive and unruly in the schoolroom, the limiting forces may be imposed through Ritalin or other drugs, which may have even started at a much earlier age. Regardless of how it is achieved, learning from the past—the Phase 1 model—becomes the starting point of our lives as we move into adulthood. From this starting point, we begin to develop our mental faculties.

The Overarching ISCJ Model

To help connect the dots, we have prepared a larger version of the Intelligent Social Change Journey, which is at Appendix A. The Overarching ISCJ Model focuses on the relationships of the phases with other aspects of the journey. For example, three critical movements during our journey, consistent with our movement through the phases, are reflected in expanded consciousness, reduction of forces and increased intelligent activity. *Consciousness* is considered a state of awareness and a private, selective and continuous change process, a sequential set of ideas, thoughts, images, feelings and perceptions and an understanding of the connections and relationships among them and our self. *Forces* occur when one type of energy affects another type of energy in a way such that they are moving in different directions, pressing against each other. Bounded (inward focused) and/or limited knowledge creates forces. *Intelligent activity* represents a state of interaction where intent, purpose, direction, values and expected outcomes are clearly understood and communicated among all parties, reflecting wisdom and achieving a higher truth. We will repeat this definition where appropriate throughout the book.

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INSIGHT: **The ISCJ is a journey toward intelligent activity, which is a state of interaction where intent, purpose, direction, values and expected outcomes are clearly understood and communicated among all parties, reflecting wisdom and achieving a higher truth.**
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Immediately below each phase of the Overarching ISCJ model are characteristics related to each phase. These are words or short phrases representing some of the ideas that will be developed in each section supporting each phase. **Phase 1,** *Learning from the Past*, characteristics are: linear and sequential, repeatability, engaging past learning, starting from current state, and cause and effect relationship. **Phase 2**, *Learning in the Present*, characteristics are: Recognition of patterns; social interaction; and co-evolving with the environment through continuous learning, quick response, robustness, flexibility, adaptability and alignment. **Phase 3**, *Co-Creating Our Future*, characteristics are: Creative imagination, recognition of global Oneness, mental in service to the intuitive; balancing senses; bringing together time (the past, present and future); knowing; beauty; and wisdom.

Still exploring the overarching model, at the lower part of the graphic we see three areas related to knowledge in terms of the nature of knowledge, areas of reflection, and cognitive shifts necessary for each phase of change. For ease of reference, we have also included the content of these three areas in Table ISCJ-1.

In Phase 1, *Learning from the Past*, the nature of knowledge is characterized as a product of the past and, as we will learn in Chapter 2, knowledge is context sensitive and situation dependent, and partial and incomplete. Reflection during this phase of change is on reviewing the interactions and feedback, and determining cause-and-effect relationships. There is an inward focus, and a questioning of decisions and actions as reflected in the questions: What did I intend? What really happened? Why were there differences? What would I do the same? What would I do differently? The cognitive shifts that are underway during this phase include: (1) recognition of the importance of feedback; (2) the ability to recognize systems and the impact of external forces; (3) recognition and location of "me" in the larger picture (building conscious awareness); and (4) pattern recognition and concept development. These reflections are critical to enabling the phase change to co-evolving.

In Phase 2, *Learning in the Present*, the nature of knowledge is characterized in terms of expanded cooperation and collaboration, and knowledge sharing and social learning. There is also the conscious *questioning of why*, and the *pursuit of truth*. Reflection includes a deepening of conceptual thinking and, through cooperation and collaboration, the ability to connect the power of diversity and individuation to the larger whole. There is an increasing outward focus, with the recognition of different world views and the exploration of information from different perspectives, and expanded knowledge capacities. Cognitive shifts that are underway include: (1) the ability to recognize and apply patterns at all levels within a domain of knowledge to predict outcomes; (2) a growing understanding of complexity; (3) increased connectedness of choices, recognition of direction you are heading, and expanded meaning-making; and (4) an expanded ability to bisociate ideas resulting in increased creativity.

In Phase 3, *Co-Creating Our Future*, the nature of knowledge is characterized as a recognition that with knowledge comes responsibility. There is a conscious pursuit of larger truth, and knowledge is selectively used as a measure of effectiveness. Reflection includes the valuing of creative ideas, asking the larger questions: How does this idea serve humanity? Are there any negative consequences? There is an openness to other's ideas, a questioning with

humility: What if this idea is right? Are my beliefs or other mental models limiting my thoughts? Are hidden assumptions or feelings interfering with intelligent activity?

Phase of the Intelligent Social Change Journey	ISCJ: Nature of Knowledge	ISCJ: Points of Reflection	ISCJ: Cognitive Shifts
[Detailed in the Introduction to the ISCJ and reflective of the Overarching ISCJ Model in Appendix A.]			
PHASE 1: *Cause and Effect* (Requires Sympathy) •Linear, and *Sequential* •Repeatable •Engaging past learning •Starting from current state •Cause and effect relationships	•A product of the past •Knowledge is context sensitive and situation dependent •Knowledge is partial and incomplete	•Reviewing the interactions and feedback •Determining cause-and-effect relationships; logic •Inward focus •Questioning of decisions and actions: What did I intend? What really happened? Why were there differences? What would I do the same? What would I do differently?	•Recognition of the importance of feedback •Ability to recognize systems and the impact of external forces •Recognition and location of "me" in the larger picture (building conscious awareness) •Beginning pattern recognition and early concept development
PHASE 2: *Co-Evolving* (Requires Empathy) •Recognition of patterns •Social interaction •Co-evolving with environment through continuous learning, quick response, robustness, flexibility, adaptability, alignment.	•Expanded knowledge sharing and social learning •Engaging cooperation and collaboration •Questioning of why? •Pursuit of truth	•Deeper development of conceptual thinking (higher mental thought) •Through cooperation and collaboration ability to connect the power of diversity and individuation to the larger whole •Outward focus •Recognition of different world views and exploration of information from different perspectives •Expanded knowledge capacities	•The ability to recognize and apply patterns at all levels within a domain of knowledge to predict outcomes •A growing understanding of complexity •Increased connectedness of choices •Recognition of direction you are heading •Expanded meaning-making •Expanded ability to bisociate ideas resulting in increased creativity
PHASE 3: *Creative Leap* (Requires Compassion) •Creative imagination •Recognition of global Oneness •Mental in service to the intuitive •Balancing senses •Bringing together past, present and future •Knowing; Beauty; Wisdom.	•Recognition that with knowledge comes responsibility •Conscious pursuit of larger truth •Knowledge selectively used as a measure of effectiveness	•Valuing of creative ideas •Asking the larger questions: How does this idea serve humanity? Are there any negative consequences? •Openness to other's ideas; questioning with humility: what if this idea is right? Are my beliefs or other mental models limiting my thought? Are hidden assumptions or feelings interfering with intelligent activity?	•A sense and knowing of Oneness •Development of both the lower (logic) and upper (conceptual) mental faculties, which work in concert with the emotional guidance system •Applies patterns across domains of knowledge for greater good •Recognition of self as a co-creator of reality •The ability to engage in intelligent activity •Developing the ability to tap into the intuitional plane at will

Table ISCJ-1. *The three Phases from the viewpoints of the nature of knowledge, points of reflection and cognitive shifts.*

Cognitive shifts that are underway include: (1) a sense and knowing of Oneness; (2) development of both the lower (logic) and upper (conceptual) mental faculties, which work in concert with the emotional guidance system; (3) recognition of self as a co-creator of reality; (4) the ability to engage in intelligent activity; and (5) a developing ability to tap into the intuitional plane at will.

Time and space play a significant role in the phase changes. Using Jung's psychological type classifications, feelings come from the past, sensations occur in the present, intuition is oriented to the future, and thinking embraces the past, present *and* future. Forecasting and visioning work is done at a point of change (McHale, 1977) when a balance is struck continuously between short-term and long-term survival. Salk (1973) describes this as a shift from Epoch A, dominated by ego and short-term considerations, to Epoch B, where both *Being and ego co-exist*. In the ISCJ, this shift occurs somewhere in Phase 2, with Beingness advancing as we journey toward Phase 3. Considerable focus to time and space occurs later in the book (Chapter 16/Part III).

Cognitive-Based Ordering of Change

As a cognitive-based ordering of change, we forward the concept of logical levels of learning consistent with levels of change developed by anthropologist Gregory Bateson (1972) based on the work in logic and mathematics of Bertrand Russell. This logical typing was both a mathematical theory and a law of nature, recognizing long before neuroscience research findings confirmed the relationship of the mind/brain which show that we literally create our reality, with thought affecting the physical structure of the brain, and the physical structure of the brain affecting thought.

Bateson's levels of change range from simplistic habit formation (which he calls Learning I) to large-scale change in the evolutionary process of the human (which he calls Learning IV), with each higher level synthesizing and organizing the levels below it, and thus creating a greater impact on people and organizations. This is a hierarchy of logical levels, ordered groupings within a system, with the implication that as the levels reach toward the source or beginning **there is a sacredness or power or importance informing this hierarchy of values** (Dilts, 2003). This structure is consistent with the phase changes of the Intelligent Social Change Journey.

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INSIGHT: **Similar to Bateson's levels of change, each higher phase of the Intelligent Social Change Journey synthesizes and organizes the levels below it, thus creating a greater impact in interacting with the world.**
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With Learning 0 representing the status quo, a particular behavioral response to a specific situation, Learning I (first-order change) is stimulus-response conditioning (cause-and-effect change), which includes learning simple skills such as walking, eating, driving, and working. These basic skills are pattern forming, becoming habits, which occur through repetitiveness without conceptualizing the content. For example, we don't have to understand concepts of motion and movement in order to learn to walk. Animals engage in Learning I. Because it is not necessary to understand the concepts, or underlying theories, no questions of reality are raised. Learning I occurs in Phase 1 of the ISCJ.

Learning II (second-order change) is deuteron learning and includes creation, or a change of context inclusive of new images or concepts, or shifts the understanding of, and connections among, existing concepts such that meaning may be interpreted. These changes are based on mental constructs that *depend on a sense of reality* (McWhinney, 1997). While these concepts may represent real things, relations or qualities, they also may be symbolic, specifically created for the situation at hand. Either way, they provide the means for reconstructing existing concepts, using one reality to modify another, from which new ways of thinking and behaviors emerge.

Argyris and Schon's (1978) concept of double loop learning reflects Level II change. Learning II occurs in Phase 2 of the ISCJ.

Learning III (third-order change) requires thinking beyond our current logic, calling us to change our system of beliefs and values, and offering different sets of alternatives from which choices can be made. Suggesting that Learning III is learning about the concepts used in Learning II, Bateson says,

> In transcending the promises and habits of Learning II, one will gain "a freedom from its bondages," bondages we characterize, for example, as "drive," "dependency," "pride," and "fatalism." One might learn to change the premises acquired by Learning II and to readily choose among the roles through which we express concepts and thus the "self." Learning III is driven by the "contraries" generated in the contexts of Learning I and II. (Bateson, 1972, pp. 301-305)

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INSIGHT: **There is a freedom that occurs as we leave behind the thinking patterns of Phase 2 and open to the new choices and discoveries of Phase 3.**
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Similarly, Berman (1981, p. 346) defines Learning III as, "an experience in which a person suddenly realizes the arbitrary nature of his or her own paradigm." This is the breaking open of our personal mental models, our current logic, losing the differential of subject/object, blending into connection while simultaneously following pathways of diverse belief systems. Learning III occurs as we move into Phase 3 of the ISCJ.

Learning IV deals with revolutionary change, getting outside the system to look at the larger system of systems, awakening to something completely new, different, unique and transformative. This is the space of *incluessence*, a future state far beyond that which we know to dream (Dunning, 2015). As Bateson described this highest level of change:

> The individual mind is immanent but not only in the body. It is immanent in pathways and messages outside the body; and there is a larger Mind of which the individual mind is only a sub-system. This larger Mind is comparable to God and is perhaps what people mean by "God," but it is still immanent in the total interconnected social system and planetary ecology. (Bateson, 1972, p. 465)

Table ISCJ-2 below is a comparison of the Phases of the Intelligent Social Change Journey and the four Levels of Learning espoused by Bateson (1972) based on the work in logic and mathematics of Bertrand Russell, and supported by Argyris and Schon (1978), Berman (1981), and McWhinney (1997).

An example of Learning IV is Budda's use of intuitional thought to understand others. He used his ability to think in greater and greater ways to help people cooperate and share together, and think better. Learning IV is descriptive of controlled intuition in support of the creative leap in Phase 3 of the ISCJ, perhaps moving beyond what we can comprehend at this point in time, perhaps deepening the connections of sympathy, empathy and compassion to unconditional love.

Phase of the Intelligent Social Change Journey	Level of Learning [NOTE: LEARNING 0 represents the status quo; a behavioral response to a specific situation.]
PHASE 1: *Cause and Effect* (Requires Sympathy) •Linear, and *Sequential* •Repeatable •Engaging past learning •Starting from current state •Cause and effect relationships	**LEARNING I:** **(First order change)** •Stimulus-response conditioning •Includes learning simple skills such as walking, eating, driving and wokng •Basic skills are pattern forming, becoming habits occurring through repetitiveness without conceptualizing the content •No questions of reality
PHASE 2: *Co-Evolving* (Requires Empathy) •Recognition of patterns •Social interaction •Co-evolving with environment through continuous learning, quick response, robustness, flexibility, adaptability, alignment.	**LEARNING II: (Deutero Learning)** (Second order change) •Includes creation or change of context inclusive of new images or concepts •Shifts the understanding of, and connections among, existing concepts such that meaning may be interpreted •Based on mental constructions that depend on a sense of reality
[Moving into Phase 3] **PHASE 3**: *Creative Leap* (Requires Compassion) •Creative imagination •Recognition of global Oneness •Mental in service to the intuitive •Balancing senses •Bringing together past, present and future •Knowing; Beauty; Wisdom.	•**LEARNING III: (Third order change)** •Thinking beyond current logic •Changing our system of beliefs and values •Different sets of alternatives from which choices can be made •Freedom from bondages **LEARNING IV:** •Revolutionary change •Getting outside the system to look at the larger system of systems •Awakening to something completely new, different, unique and transformative •Tapping into the larger Mind of which the individual mind is a sub-system.

Table ISCJ-2. *Comparison of Phases of the Intelligent Social Change Journey with Levels of Learning*.

How to Best Use this Material

This book has, quite purposefully, been chunked into five smaller books, referred to as Parts, which are both independent and interdependent. Chunking is a methodology for learning. The way people become experts involves the chunking of ideas and concepts and creating understanding through development of significant patterns useful for identifying opportunities, solving problems and anticipating future behavior within the focused domain of knowledge. Figure ISCJ-3 shows the relationship of the Parts of this book and their content to the Intelligent

Social Change Journey. *Remember*: the ISCJ is a journey of expansion, with each Phase building on—and inclusive of—the former Phase as we develop our mental faculties in service to the intuitional, and move closer to intelligent activity. As such, one needs to experience the earlier phases in order to elevate to the upper levels. Early life experiences and educational development during these early stages create the foundation and capacity to develop into higher levels of interactions and ways of being.
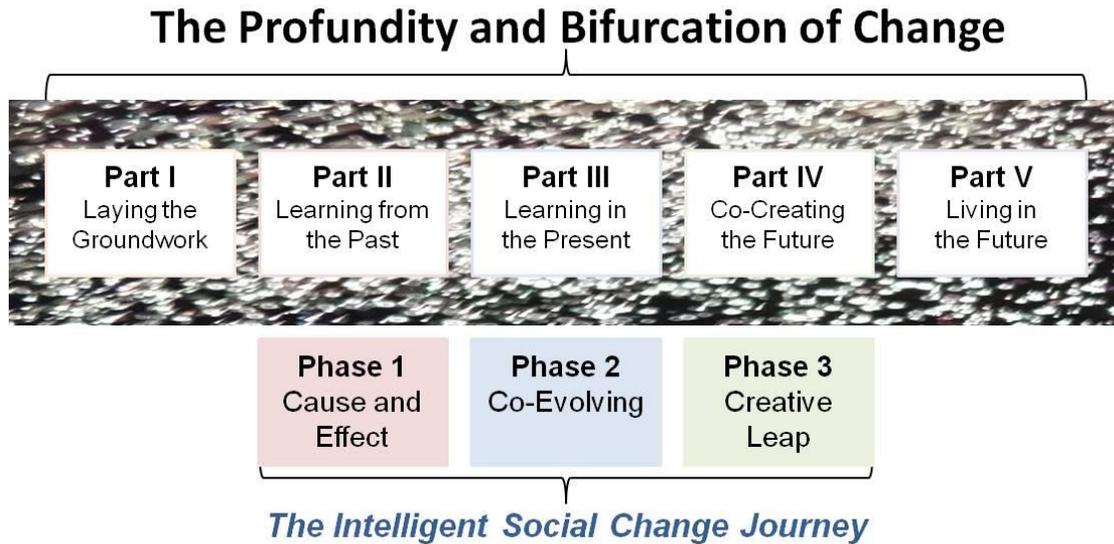
Figure ISCJ-3. *Relationship of Parts and Phases of the ISCJ.*

While many different ideas have been introduced in the paragraphs of this Introduction to the Intelligent Social Change Journey, you will discover that all of these ideas are addressed in depth during the course of this book, and each Part is inclusive of tools, references, insights and reflective questions provided in support of your personal learning journey. We also cross-reference, both within the Parts, and across all of the Parts.

This is a journey, and as such *the learning is in the journey*, the reflecting on and application of the learning, not in achieving a particular capability or entering the next Phase at a specific point in time. Similar to the deepening of relationships with others, the growth of understanding and expansion of consciousness takes its own time, twisting and curving forwards and backwards until we have learned all we can from one frame of reference, and then jump to another to continue our personal journey. That said, we suggest that those who are impatient to know the topics within this book, but reluctant to read such an extended text, jump to Chapter 11/Part III, which provides readiness assessment statements and related characteristics reflecting the high-level content of this book.

For your reference, the Overarching ISCJ model can be downloaded for printing at www.MQIPress.net The corresponding author may be reached at alex@mountainquestinstitute.com

In Co-Service, Alex, David, Arthur, Theresa and John