

Essay XIX: The Heritage Drive—Extending Legacy in Time

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As we shift from a focus on Generativity Two (which is about leaving a tangible legacy within an organizational setting) to Generativity Three (which is about ensuring that legacy is sustained in heritage), we are moving from extending space to extending time.

This essay is about the nature and range of Generativity Three. It is also about the motivations that drive the push toward guardianship. While we will identify many different motivating drives in exploring the varieties of Generativity Three engagements, we focus on five that are central and reoccur: (1) nobles oblige, (2) living in a tangible culture, (3) safeguarding specific traditional values, (4) outliving ourselves, and (5) caring deeply by "passing it forward."

Nobles Oblige

In many traditional societies—especially those with a strong and sustained class structure—the primary obligation of those at the top of the societal hierarchy is to preserve existing values, aspirations, and assumptions within society. This is the noble obligation (*nobles oblige*). One of our Emerging Sage leaders addresses this obligation directly:

It's an old-fashioned notion, but I have a healthy dose of *noblesse oblige*. It was made abundantly clear to me from the beginning that I was very lucky, and with that came some burdens. My family, schools, and community reinforced that I have been blessed and need to pass those gifts on. When I was a little girl, every year at Christmas my school would adopt a family. We would raise money, pick out presents, and give them a Christmas they would not have been able to afford. Another source of motivation and inspiration is my religion. Social justice is a basic tenant of Unitarian Universalism. There's a hymn that we sing, "We'll build a world..." It's about making a difference, about making this world we live in the best that it can be.

In traditional societies this function is often served by religious institutions, although preservation and reinforcement also may be in the hands of those who enforce the law (including the judicial system), by those who defend the society from external intrusion (the military), and

even by outside influencers (those who monitor the media in highly repressive societies). In each of these societal roles we find Generativity Three, the preservation of that which currently exists.

The Tangible Culture

Over forty-five years, both of us have been involved as leaders, consultants, and coaches to various for-profit, not-for-profit, and government organizations. In each, we have discovered various subculture that often operate in opposition to one another (Bergquist, Guest and Rooney, 2004; Bergquist and Pawlak, 2005). In many instances, an old subculture has re-arisen or been resurrected in response to the emergence of a powerful new subculture. The past twenty years have repeatedly demonstrated the introduction of subcultures associated with new digital communication devices, the globalization of the world's economy, and the many ways in which ancient religious and political ideologies have been challenged.

These new subcultures threaten existing norms, values and ways of operating in contemporary societies. And, they have led to the emergence of powerful counter cultures that often emphasize not just traditions but also tangibility. Just as the digital era has inaugurated a virtual subculture that has made the world flat, so a powerful reaction against this virtual subculture has led to the emergence of a tangible subculture that emphasizes place, history, tradition, and fundamental values.

The noted sociologist and social theorist, Talcott Parsons (Parsons and Bales, 1955), emphasized the importance of this subculture many years ago when he used a complex term, *latent pattern maintenance*, to describe the critical task to be performed in any viable social system that maintains often unacknowledged but highly influential patterns. These latent patterns are maintained through ceremony, preservation, honoring, and other Generativity Three acts that we describe later in this chapter.

We conclude that this critical societal function serves as a strong motivator for many Generativity Three actors. Much as the patterns that Generativity Three is seeking to maintain, the motivations behind these acts are often unknown to the generative actor and to the people with whom this actor engages. Somehow it just seems to be the "right thing to do" and is rarely guided by a reading of Parson's dense and highly theoretical description of latent pattern maintenance. As the songwriter Irving Berlin would say, "It just comes naturally."

Safeguarding a tradition seems to be at the heart of what George Vaillant means when writing about "guardianship," although we suspect that he did not intend to limit himself to this often - reactionary motivation. While the safeguarding function can be nothing more than hesitancy to accept change and a reaction against anything new, it also can be founded in a strong commitment to keeping what is good in a society. This motive is prevalent in one of eight forms of contemporary Generativity Three (preservation of values) that we will describe later in this chapter.

In essence, a tradition is safeguarded in one of five ways. First, it can be preserved by ensuring that nothing changes in the system; we set up a fortress, buttress it, and make certain nothing will "pollute" or "water-down" the tradition; we see this form of safeguarding in the policies of many countries that place severe restrictions on immigration. We also find in the constant monitoring of theological and ideological conformity by some religious sects and political groups. Strict enforcement often leads to the splintering of these groups over minor differences of opinion. Unfortunately, this form of preservation often results in not just splintering, but ultimately the death of the system itself. Theorists tell us that systems which are closed and have very heavy boundaries cannot survive; there must be openness and permeable boundaries if a system is to remain viable. Diverse input (ideas, products, sources of energy) must be available to the system, especially if it is to remain creatively adaptive (Stacey, 1996; Page, 2011)

A second strategy for safeguarding a tradition is found in the process of *discernment*: which elements of the tradition should be preserved, and which should be discarded? This process is quite challenging. As behavioral economists (Kahneman, 2011; Ariely, 2008) have repeatedly shown, we tend to hold on to what we already have. The joy we anticipate from successfully doing something new is much less motivating than the sorrow we anticipate from losing something we already possess. Even more painful is the regret we anticipate after having given away or lost something that once was of great value to us.

When describing the processes involved in personal life transitions, Bill Bridges (1980,2001) suggests that we move through a deep, troubling "neutral zone." He describes a state of being that closely resembles being in *limbo*, an intermediate zone between life and death. This is the zone of judgement and spiritual challenge that can be found in many religions. We often need

abundant support and some Generativity Two mentoring and motivating to engage in sorting-out that which is to be saved and that which is to be discarded.

There is a third strategy, one that enables us to have our cake, and eat it too, with regard to Generative Safeguarding. We can celebrate a tradition, but not embrace it too tightly. The *Mardi Gras* festivals that are held throughout the world represent old and revered traditions that are not engaged during most of the year and are often not taken too seriously even when enacted. There are many such festivals, fairs and carnivals that come to town once a year. Matthew Miles (1964) has written about temporary systems that allow us to engage elements of ourselves that are not usually part of our daily routine and persona. We honor the tradition without getting too "uptight" in terms of engaging it every day of our life.

A fourth strategy stands in stark contrast to the third. We take some traditions quite seriously and wrap them around our daily living, even though we live in a modern and nontraditional society. Observant Orthodox Jewish and Muslim colleagues find ways to engage their elaborate traditions while also living and working in a contemporary, secular society. The challenge for these remarkable men and women is great, especially in a world that is becoming increasingly suspicious of those who dress differently, practice restricted diets, and choose to allocate time each day to religious devotions.

The fifth and probably most impactful strategy for many people is to set aside space where the tradition can be fully honored. For example, certain islands in Hawaii are reserved for safeguarding traditional Hawaiian culture. National parks, land trusts and game preserves have boundaries and are protected. Also, theme parks are established to emulate and look after old traditions. All of these safeguards can be identified by a single word, which is itself wrapped in tradition: *sanctuary*.

We need sanctuaries in our lives, both because they can be re-creating and because they are often sources of new learning or the remembrance and enforcement of old learning that has been forgotten or ignored (Bergquist, 2017). We see the role of sanctuary being played out in many of the Generativity Three acts that we will identify in this chapter. Sanctuaries are temporary systems. They are about the sacred and about that which we wish most to safeguard. Sanctuary is a place of deep caring.

Paying It Forward

The fourth motive is one that will be emphasized throughout this chapter. It is a motive that bridges the past and future. We preserve in order to pass forward a heritage, a story or a plot of land. The phrase "paying it forward" is now in vogue, in part because of the movie with the same title. It is a phrase that is directly aligned with this motive. For many years (since 1964), one of the best-known examples of paying it forward is SCORE, the service organization that provides free mentorship, consultation, workshops, and publications to small business entrepreneurs. As a resource partner with the United States Small Business Administration, SCORE tends to attract volunteers with extensive experience in running or consulting with businesses.

Retired SCORE mentors have served more than 8.5 million clients. What has motivated more than 11,000 volunteers to assist SCORE clients? There is considerable evidence from SCORE volunteers that paying forward can play a central role as a principal motivation. SCORE volunteers have often been successful in their own career and have frequently been guided, inspired, and assisted by other people along the way; they now want to show their gratitude in a tangible manner by providing the same kind of support to others who are just starting their own career or business.

We find a similar incentive operating among people we interviewed for the Sage Leadership Project. Sages often note that they are serving others and wish to preserve their heritage, community or environment—in large part because of the generative work done by those who came before them and "paved the way" (via Generativity Two), or by simply demonstrating what it means to be a guardian of heritage, community, or environment. Gratitude, in other words, is expressed by many of our Sage leaders not with a "thank you letter" but with action that exemplifies and builds on work done earlier. We not only want to "outlive ourselves" through Generativity Three; we also wish to help a previous generation outlive themselves by sustaining their actions, outcomes, and legacy.

There is a second way in which we pay it forward, through a "regression" in the nature of work we do. Many of our Sage leaders have been in executive positions in corporations or government agencies. They are grateful for the status, influence and economic security afforded by their former position. In gratitude, they now wish to do something of a humbler nature. Emulating

Greenleaf's notion of "servant leader," (Greenleaf, 1970) they want to adopt rescue dogs rather than rescue a failing division of their corporation. They would rather clean-up the banks of a river than try to pass legislation that prevents the building of a dam on the river. They want to act in a small but tangible manner, accessing one of the other motives we have identified. As Pete Seeger noted in his work in preserving the Hudson River, it is often smart to "think globally, but act locally." We pay back by paying forward in an immediate and specific manner. We care deeply by caring intensively and in a sustained manner for something that stands next to us. To borrow from a phrase used by ego psychologists, we "regress in the service of a specific cause."

Outliving Ourselves

Obviously, the primary way many of us "outlive" ourselves is by having children; they carry our genes and hopefully our values and aspirations. At the heart of Generativity One is a belief that our children (or projects) will outlive us and will enable us to envision a world that endures after our own death or retirement from a project. One of the reasons the death of a child is so profound is that it shatters our belief that our self will be sustained through our children. "We bury our spouses in the ground, but bury our children in our heart," noted a Korean parent who had lost his child and was interviewed by one of our doctoral students many years ago. It is in our heart that the belief in some form of immortality, or life of self beyond death, resides.

This extension in space beyond our own death is a very important concept because it leads us beyond the secular world of human development to the world of spirit and soul. It leads us to this desire for some form of immortality—as noted by John Kotre in *Outliving our Selves* (Kotre, 1984). We will have more to say about this desire for immortality at several points in this series of essays. At this point, we propose that we look for multiple ways to leave a legacy when faced with this compelling wish to outlive ourselves.

We often seek to leave a legacy through the work we have done in an organization or in our community. These are examples of Generativity Two and Four. We can also outlive ourselves by having a building named after us or doing such important work in our community that a plaque is erected in our honor. Most of us have neither the money to donate a building nor sufficient visibility to earn a plaque in the park. But we do have the capacity to work toward the preservation of a tradition or event of which we have been a part. We may be a veteran of the

Korean War and participate in each year's Memorial Day parade, wearing a cap that brightly displays the insignia of our unit. We may attend our college alumni reunion and find it is a wonderful place to celebrate our accomplishments as young men and women. We honor ourselves as participants in these generative events.

Conclusions

What if none of these five motivators is present in our life? We propose that guardianship without generativity will often lead to obstruction and even to violence. It certainly will lead to a stifling stagnation. We are either stuck in the past or have dismissed the past altogether. When we are stuck in the past, anything or anyone who is new seems to be threatening. The new must be discarded, discredited or destroyed. If we dismiss the past, then we are no longer caring for that which came before us. The past is of no value. It is "irrelevant" – that which "time has passed by." This includes our personal history, our past contributions, our legacy.

We may instead be nostalgic about our past life—but do nothing beyond it. We don't honor our own heritage. We don't honor the contributions of people who have impacted our lives. We move forward without bringing the past with us. This leaves us in a state of stagnation—much as is the case when we are unsuccessful in our engagement of the other three generativity roles. It seems that Generativity always has something to do with extension—reaching out to other people, to a broader scope of care or reaching out to honor a care for that which has existed in the past.

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