# Finding Essence in a VUCA-Plus World V: Action Steps Toward Establishing and Maintaining Trust

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It is at this point that Essentials and Essence join hands. What are the Essential steps to be taken in establishing the Essence of Trust? I wish to first offer a set of action steps that are aligned with a psychological model of interpersonal and group relations that was proposed (quite successfully) by my colleague, Will Schutz. I then offer a more poetic approach, relying on the wisdom offered by Oriah Mountain Dreamer in his widely read statement called "The Invitation." I dip into my own personal relations with a person I trust to illustrate the insights to be gained from this wise Native American elder.

## Psychological Description of Steps to Trust

As an engineer turned human relations expert, Will Schutz (1994) proposed that effective personal and group relationships are built on the successful fulfillment of three basic human needs: Inclusion, control and openness. We seek to fulfill these needs by either actively pursuing interactive moments that lead to their fulfillment or by waiting for others to engage us in a way that fulfills this need. Schutz proposed that these three needs are fulfilled in a sequential manner. We must first ensure that our need for inclusion is fulfilled. We can then move on to the need for control. With the establishment of clarity regarding control, we are ready to address the need for openness (what Schutz originally called the need for affection).

I incorporate Schutz's three interpersonal needs, their enactment and their sequencing in my own proposal regarding the establishment of Trust. My own Lens as a way to view the Essence of Trust is beholding to the insights offered by Will Schutz. I believe that Trust is to be found when those involved in a relationship (personal or collective) feel included. Furthermore, they are comfortable with the nature and enactment of control in the relationship and find it safe to be open with one another. I rely on Schutz's sequence in the identification of the steps to be taken toward the achievement of Trust. I also find the distinction he makes between active (expressed) and passive (wanted) perspectives on the achievement of Trust to be of great value in identifying variations that can be taken in seeking to achieve the Essence of Trust.

### Spatial Representation of Needs

The interpersonal need for Inclusion can be best defined in spatial terms as In/Out. This need concerns the decision, first, as to whether or not someone wants to join a specific group. The criteria for a decision to seek membership center in part on the nature of work being done by the group as well as its reason for being in existence.

The interpersonal need for Control can be best defined in spatial terms such as Up/Down. Authority must be clearly defined. Control must be firmly established. There are those in charge and those who are guided by those who are in charge.

What about Openness—the third interpersonal need? This need can be best defined in such spatial terms as Near/Far. This need is key in the establishment of a caring, supportive environment. We are inclined to be open when it is safe to express concerns and suggest alternative perspectives regarding ways in which the group or organization operates.

With this initial introduction of Will Schutz' three primary interpersonal needs, we are ready for a more detailed description of each need and its relationship to Trust. I will also explore the proactive and reactive strategies for fulfilling each of the needs and offer case studies that show each need in operation in the search for Trust.

## The Need for Inclusion

We are drawn (at least in part) to other people, to groups and to organizations that are inspiring and have a compelling vision—especially if the specific nature of work being performed by this group or organization is closely aligned with its vision and inspiration. If we are in some sense an "outsider" (because of race, ethnicity, gender, age or abilities), then another important criterion emerges: do they want me? Acceptance can be a major factor for many people in our increasingly diverse world of work. Trust requires first and foremost a sense that I am wanted by other people to be part of their life (or at least this relationship or group).

Decisions regarding inclusion and Trust focus on gaining more information about the relationship or group. We want to know more about the other person with whom we might establish a Trusting relationship. We want to know not only about the nature of work being done by a group or organization, as well as the vision it holds, but also about how it operates. What is the nature of its leadership and its priorities? Put simply, we want to know what is happening inside before we knock on the door.

*Key Inclusion Questions and Concerns:* someone with a strong inclusion need has several immediate "agenda" items when thinking about entering into a relationship or joining a group or organization. How do I find out about this person, group or organization? Illumination is of highest priority: a light of some sort must be shined on the group, for it initially resides in the shadows (operating behind the door). In making decisions regarding inclusion, I need to know about what I might be facing. I must illuminate the relationship, group or organization to the greatest extent possible, while realizing that it probably will not be fully lit until I have established a connection.

As Kurt Lewin (Marrow, 1969) noted many years ago, we can't really begin to understand any social system until we push it--and it kicks back against us. We operate a bit like a piece of litmus paper that is dipped into a solution and is changed (in color) by this solution, thus revealing something about its character (level of acid content). This is what today, in the behavioral sciences, we often call action science (Argyris, 1985). It is what Lewin original labelled as "action research".[i] We are finding out about some relationship or institution by seeking to influence or at least interact with it. Thus, we are caught in a polarity: we want to remain outside the door before entering into a relationship, group or organization,

yet we don't really know what we are getting into until we have opened the door and engaged with this social system (interpersonal relationship, group, or organization).

There are two key questions to be asked with regard to Inclusion—and ultimately the establishment of Trust: (1) Do I want to be included in this social system and (2) How do I get included or stay un-included? The answers to these questions are often not easy to obtain – for the relationship, group or organization does truly exist in the dark until such a time as we know what is really happening in this system. We don't know what the system's "real" values are or purposes are for operating at the present time. Clarifying questions usually can't be asked because the level of trust is still very low (since this system has not yet begun to operate with me as a member. We can't really "Trust" how the system is operating when it is in full view of me—as the person considering inclusion. Everyone might be 'on good behavior" (because the system wants me to join) – or might be "acting badly" (because they are not sure if I should be included).

Even when deciding to enter a relationship, group or organization and having been accepted into this system, a thoughtful person is likely to just observe what is happening in the system—which means that they are often relatively quiet when first entering a relationship or joining a group. It is about being realistic regarding the relationship, group or organization being considered for inclusion. How is this system really going to operate and what truly are its values and its priorities? If it is a transactional relationship or a working group or organization, we also want to know about its desired outcomes. Does this person have a good reason for asking me to join them in a Trusting relationship? Does this cluster of people have a good reason for gathering together and working with one another? Is there a compelling purpose in forming a Trusting relationship. Many years ago, Martin Buber (1958) wrote about relationships that have a higher-order compelling purpose—a commitment to something greater than either person in the relationship. He identified these special relationships as *I/Thou* and contrasted them with I/It relationships that exist without any higher order purpose.

Having gathered this information, the prospective member of the social system turns consciously or unconsciously to five primary tactical concerns regarding inclusion: (1) Should I just stand here for a bit and observe this person or cluster of people to see what is happening before committing myself? (2) How do I determine if I really want to be part of this relationship, group or organization? (3) If I do want to join, how do I get genuinely included? (4) If I don't want to engage in this relationship, group or organization, do I still have to join this social system for some reason? (5) What role should I play in this social system so that I can be included and remain included, or not be truly included but still "show up" as a (reluctant) participant in this relationship or as a "member" of this group/team?

What about those people who come to a relationship, group or organization with an orientation toward something other than working with other people? They might be "introverts," "loners" or simply folks who like to work alone or with a few other people whom they fully trust. While they are likely to lean toward the collection of relevant information when first knocking on the door, they often embrace quite different priorities when knocking on the door—and can get in trouble when at least partially ignoring the information. Unfortunately, these potential members of a group or organization may be vulnerable to the P.R. of this group or organization. Even when they confront the reality of the other person, group or organization in its daily operations, they are likely to hang on to their original perspective regarding this person, group or organization. These are folks who often are not only reticent to join with other people, but also lack the "social intelligence" to make accurate discernments regarding the "character" and

priorities of these people.  Cognitive dissonance reigns supreme, which can lead to self-deception regarding the real values held by other people. Disillusionment and de-moralization are all-too-frequent outcomes of those without social IQ determining whether or not to seek inclusion in a social system. This is often why they are reticent about working with other people whom they do not know well.

There are also those people who are inclined to break through the door. Rather than knock and ask to be invited in, these bold (often extraverted) folks are likely to enter with a blaze of activity and a flurry of ideas (good and bad). They are inclined to join with Kurt Lewin in learning about the social system by observing how other people react to the way in which they are acting or the ideas they are presenting. Notes are taken about the level of acceptance (as well as the vitriol) that comes with their behavior and/or introduction of an idea. Is the resistance a matter of not liking the idea—or not liking someone new to the system getting so actively involved? Is someone entering a new relationship supposed to be "careful" about what they say and do? Are new members of a group supposed to sit back and observe for a while? Basically, as we are about to see, it is a matter of proactive and reactive inclusion. If we get it wrong about the accepted processes of inclusion than we are likely to be assigned for at least a short period of time to the "penalty box." We might have some good ideas, but these ideas are likely to be met with stony silence or a few brief words of dismissal.

*Proactive and Reactive Inclusion:* An important decision must be made as to whether we are going to actively seek inclusion in the social system (proactive inclusion) or whether we are looking to others in the social system to invite us in (reactive inclusion). When we are motivated by a proactive need for inclusion then we are "inviting ourselves" into the relationship or group – and therefore are taking the risk of being rejected by the other person or group (informally or formally). The person with whom we are about to relate might find a "good" reason to make our initial meeting quite short. They might decline to meet for a second time or at least find multiple "excuses" for not finding time for the second meeting.

The "termination" of a brief relationship is rarely stated in an overt manner—however, the message soon becomes clear. "I don't really want to establish a relationship with you." Similarly, members of a group might directly or indirectly indicate one of the following: "who invited you in?" "Wait a minute, we have to decide if we want you to be a member of this group!" "I'm not sure you will want to be a member of this group." "I think you should reconsider, since you obviously are not liked by most of us." While these words are not usually stated directly to someone wanting to join a group, there are many ways that these exclusionary inclinations are expressed through nonverbal behavior, through communication patterns in the group, or through the assignment of roles and responsibilities in the group.

Of course, there is also the possibility that another person will welcome our active engagement with them upon first meeting. They are themselves a bit "shy" or "awkward" in meeting new people and appreciate the proactive initiative we have taken. Similarly, group members might welcome in one's proactive gesture of inclusion. They might be guided by a focus on collaboration and/or advocacy of differences and community. There might be a sigh of relief that the matter of inclusion is being addressed by the person under consideration. There might also be appreciation for this "bold action" being taken (often leading to perspectives on the need for control in the group).

Some appreciation of the risk taken in being proactive about inclusion is most important as it relates to the establishment of Trust. This appreciation often is aligned with a new acquaintance or group member

being clear and transparent about their interpersonal needs and their concerns about group operations and dynamics. An acknowledgement of important interpersonal needs and concerns about interpersonal relationships and group operations might be reciprocated by the other person in a relationship or existing members of the group. This, in turn, paves the way for effective transition in the future to addressing the interpersonal need for control and openness.

What about reactive Inclusion? I am waiting for other members of the group to invite me in. I am waiting for some gesture from this person I have just met regarding their interest in me. I devote my energy to observing and taking mental notes of what is occurring. I fear rejection—even if I am mature and self-confident. For many women of a previous era, this might be reminiscent of waiting to be asked to dance at the high school prom. The pain of sitting at the side of the dance floor and hoping to be asked to dance is palpable. It is not just the fear of never being asked; it is also the fear of the wrong boy asking you to dance. Just to be balanced in offering the analogy of dance, it should be noted that the pain was also being suffered by the young men. What if she doesn't want to dance with me? I will be crushed. It might be better to not ask her. But then I will just be sitting (or standing) here and making a fool of myself.

We are now grown up and are no longer attending high school dances (with an accompanying sigh of relief). Yet, the issue of reactive inclusion is still salient. How do I let another person know that I would like to establish a relationship? How do I tell members of the group that I would like to meet with them be considered for inclusion in the group? What if they don't want me—perhaps it is better to just sit back and hope that I will be included. There are subtle ways to invite inclusion; however, it is also important not to seem too needy (like the tail wagging dog who is saying "pet me, pet me" or even "love me, love me"). There is also fear of being inconsequential. It might not even be a matter of thoughtful inclusion by the other person or the group. I simply might not matter. I am not "on their radar." They missed our planned meeting yesterday and sent no regrets. They have forgotten me. I have been left behind, while other members of the group move forward. Collaboration and the honoring of differences are nowhere in sight. If there is community—I am not a member. If Trust does exist, it lingers nowhere near me.

There is the matter of being the outsider – someone of the wrong gender, wrong race, wrong ethnic group, wrong class, wrong accent, wrong age. For these people, a shadow often hangs over a desired relationship or membership in a desired group. The "outsider" is likely to not know fully what the world is like with regard to the person with whom they would like to relate. They don't really "know" much about how this group really operates—given that they are on the outside.

Ironically (and poignantly), information about this other person or this group is particularly important—for when one is somehow in the minority, then the issue of inclusion is often particularly important and a potential source of major pain if the process of genuine inclusion is flawed. Trust is precarious when becoming "in" is unlikely and remaining "out" is a predictable outcome. Resmaa Menakem (2017) (among others) identifies something called "micro-aggression" in his book, *My Grandmother's Hands*. These are the small but frequent episodes of harm that are experienced by many marginalized people. Exclusion from a group – either formally or informally—can be one of these micro-aggressions (when informal) or can become a macro-aggression when the exclusion is formal (the "black ball" phenomenon). The alarm bells of exclusion are ringing. Trust is nowhere to be found.

*A Case Study of Inclusion:* I wish to illustrate the way proactive and reactive inclusion operate. I live in a Maine community (Harpswell) that is tight knit. Surrounded by the Atlantic Ocean, Harpswell offers a long history of fishing (especially the hauling in of lobster) and boatbuilding. Many families in this community can trace their roots back many generations, and it often takes a long time to gain acceptance as a "true" member of the Harpswell community. In other words, one is an "outside" (from "away" as they say here). It is therefore probably smart to be reactive and wait to be invited in. Or you can live with the assumption that you will always be an outsider—in which case, you just hunker down and enjoy the spectacular view of the ocean and savor the fresh (and remarkably inexpensive) lobster meals.

Then, along comes the outlier. We will call her "Sarah." She and her husband recently moved to Harpswell. Sarah was very successful as a corporate executive in New York City. The "Big Apple" is one of those places that true Mainers hate – along with anyone from Massachusetts. As a transplanted New Yorker, Sarah would be at or near the bottom of the list regarding those most "welcomed" into the Harpswell community. Sarah decided to take a proactive stance regarding inclusion. Rather than waiting to be invited in (which could take a long time), Sarah hosted a pig roast. She invited all of her neighbors to bring a side dish (assigned by first letter of their last name) and join in the consuming of the pig and side dishes brought by other members of the community. More than 70 people showed up for the first roast. This event has been held every year for the past five years – and is eagerly awaited. Sarah has met many members of the community and is already a leading figure in the community (which relates to her own high need for control and influence which was honed during her years as a corporate executive).

Sarah was proactive. She said: "here I am and here is how you can get to know me and my husband" "I'm not waiting for you to invite me to your home. I have invited you here along with many of our neighbors. Come and enjoy pig and dialogue." While members of many other closely-knit communities, who are thoughtful about the issue of inclusion, have established programs to welcome new residents to their community, Sarah took the action herself, and Harpswell now has the pig roast as one way to welcome in newcomers. The Welcome Wagon initiatives of other communities assume that the new residents will be reactive regarding their inclusion, while Sarah illustrated how one can be proactive. She doesn't just sit at the side of the dance floor. Sarah goes out and grabs one of the reticent boys and starts dancing with them. What a radical departure from our established way of being in the world as teenage boys and girls! Welcome to the 21st Century of gender-based relational norms. And welcome to Harpswell! Come and savor some smoked pig!!

## The Need for Control

Individuals, groups and members of organizations may have different ideas about how to move forward, but some perspectives and practices call for moving beyond these differences. There is an action perspective demanding that something gets done. There is a push for results. If we are going to move forward, then we must figure out who is going to be influential in this relationship, group or organization. It is equally important to determine how this influence is going to be successfully engaged. Is it a matter of expertise, formal position power, a willingness to become actively involved? What is the key influence in this social system?

*Key Control Questions and Concerns:* Fundamentally, members of any social system—be it an individual relationship, a team or entire organization—must determine who is in charge. Who will dominate in this

relationship? Who gets to speak the most? Who makes the final decision?  Does this dominance shift depending on the issue being addressed or does it remain in place regardless of what needs to happen? What will be the leadership structure of this group or organization? For example, are we going to have a single leader, rotating leadership, or perhaps leadership assigned to specific tasks?

Then there is the matter of each member's assessment of their own desire for control: do I want to have influence in this relationship? Do I wish to acquire some authority in this group or organization? Several key questions must be addressed: (1) Do I want to become influential and/or gain control in this social system and if I do how should I become influential and in control? And (2) Do I instead want the other person in this relationship or other people in this group or organization to be primary sources of influence and provide control?  Are we interested in the matter of influence primarily because we are interested in gaining attention to some idea and, hopefully, finding that this idea is subsequently enacted?  Or does the desire for influence and control reside at a deeper level? Do we always feel a bit more at ease if we are "in charge" or at least have a major "say" in which is to be done?

What is the real reason why we want to be influential? Is it more a matter of wanting to be visible? Do we want to be in control simply because we are most comfortable in a group or organization if we are in control? Are relationships in our life most enjoyable and enriching if I am guiding their direction and assuming responsibility for their outcome(s)?  Or is it a matter of reducing levels of anxiety by taking action (rather than remaining in a state of freeze)? If this is a case of anxiety, then there is likely to be a focus on the actions being taken. Anxiety is often reduced in a social system if specific goals are achieved that relate to the primary purpose for the existence and continuation of this system.  We are anxious about joining this social system and find that the anxiety is reduced (metabolized) when the system acts and is successful. The anxiety for many of us is likely to be reduced if we are somehow leading the charge. We are proactively influencing the action begin taken on behalf of the system's survival (thwarting an existential threat)

What does it take for us to lead the charge? In order to answer this fundamental question regarding control, we must find or establish clarity regarding authority in the system. There are three primary concerns: (1) how am I (and how are we) going to figure out how the power operates in this system? (2) How do we assign authority in this system and to whom do we give this authority? (3) How do I determine where and with whom I want to align myself, given the structure of authority and operation of power in this system—be it a personal relationship or a large, collective endeavor?

If there is significant agreement about critical matters, then the system is likely to lean toward (or even opening embrace) a strongly top/down mode of leadership. Trust is established because we know who is in charge and we know that they will lead us to a successful outcome (to which we are all committed). By contrast, if most of the members of a system wish there to be little formal control (a low need for control) then members of the system are likely to lean toward a more laissez-faire mode of leadership – in other words not much formal leadership at all. If there is little Trust in the current competence and intentions of the formal leader, then a bit of fumbling about will be preferable to insensitive and "stupid" leadership. No "bull in the China shop" need apply for the positive of leader in this social system!

It is interesting to note that in recent years, many social scientists (such as those operating out of the Santa Fe Institute) are studying complex dynamic systems. They have found that traditional hierarchical

rule is often incompatible with dynamic and complex systems. Beginning with Ilya Prigogine's theory of dissipative structures (Prigogine and Stegner, 1984) and leading up to more recent descriptions of complex adaptive systems (e.g., Miller and Page, 2007), there is now ample evidence that most systems in nature are not hierarchical. Just as a flock of birds does not have a formal lead bird, so large, complex organizations (especially those that are international in scope and diverse in product or service offerings) are not amendable to traditional modes of authority and control.

These organizations actually operate like the flock of birds in what is called a "self-organizing" manner. When flocking and self-organizing occurs, leadership (and control) is quite fluid. Furthermore, Trust is no longer dependent on a stable and strong center of control. We have traditionally used the term "lasses-faire" when labeling social systems that are populated by people with a low need for control. We assume that this lasses-faire perspective and practice is often accompanied by suspicion regarding formal authority. However, this might not always be the case. We can now label these social systems as "dynamically self-organizing." A more "agile" form of leadership is desired with control shifting depending on the issue being addressed and the type of expertise held by members of the system. However, it should be noted that even with this new label, self-organizing, low-control systems are likely to produce high levels of frustration among those members with a strong need for proactive control. There is little appreciation on the part of these "control freaks" for leadership provided by their more collaborative colleagues.

If we don't fully buy the self-organization premise, then we can expand our identification of leadership styles by offering a Goldilocks analysis. Relationships and organizations can be quite "hot." One person is in charge and everyone else plays a secondary role. I witnessed a "hot" relationship several days ago at a restaurant. At a nearby table, there was one man who was doing all of the talking from more than a half hour. The other three occupants of chairs at his table were there to listen and occasionally nod their head in agreement with his highly opinionated and very loud pronouncements.

Similarly, I consulted with the leader of a health care organization several years ago in which a major reorganization was being planned. When asked to diagram the current structure, a small team of physicians and administrators drew a simple diagram: one big circle with all lines leading to a second even larger circle (which was the current leader). There was NO organizational "design." There was only command and control at the top of the organization. Trust was nowhere to be found in this health care organization. There was considerable pessimism among those at the table. Their negative attitudes were justifiable. The reorganization never got off the ground.

By contrast, I witnessed the interaction (or lack of interaction) between two young people at a San Francisco restaurant. They were sitting at a coveted table overlooking the Pacific Ocean. Each of them was on their cell phones and never interacted with one another—despite the "romantic" setting in which they were located. There wasn't any "there, there" and neither of these two people was influencing the other person. Total independence and total lack of control. They were exhibiting a very "cold" relationship. Was any "caring"—let alone any Trust—to be found among these two young people. Similarly, I consulted with a struggling urban university. Virtually all of the faculty members lived far away from this rather destitute setting. Faculty meetings were rare. Formal leadership at the university was ridiculed. Students found no reason to "hang out" at the university's student union. It was a "cold" environment in which to work. I

could find no Trust in the halls of this university.  I found myself (like the faculty members) looking forward to going home.

A Goldilocks analysis would suggest that relationships, groups and organizations need not be too hot (autocratic) or too cold (laissez-faire); rather, they can be a balance between high and low levels of control. We can identify this balanced level of control as a democratic form of leadership. Or we can use a less politically loaded term and call it collaborative or use a fancier term such as "synergetic." It is in this environment that we are most likely to find Trust—though members of the system who come from a high control perspective are still unlikely to fully buy into this Goldilocks "compromise." Trust will be moderated, and our collaborative leaders are likely to be in charge of Goldilocks' porridge.

*Proactive and Reactive Control:* The dynamics of both proactive and reactive control often tend to be just as subtle as those of proactive and reactive inclusion. Inclusion and control needs aren't always easy to fulfill when a social system is operating in the midst of md-21$^{st}$ Century VUCA-Plus. In both cases, these needs are usually informally established and tacitly acknowledged in an interpersonal relationship but are sometimes explicitly addressed through the formal operations of a group or organization. For instance, in the case of Inclusion, there can be an actual vote to determine if someone is admitted into an officially formed group. This can be a vote taken by an external constituency (such as the election of congresspeople) or by those who are members of the group (as in the case of many social associations and fraternal organizations).

As we turn to Control, we find, in most cases, that the formal role of manager, director, or chair is assigned by someone or some group operating at the higher level of the organization. Even when the leadership of a group is not formally assigned from outside, the decision to be made about leadership has often been made in a public manner. The issue of control can sometimes be formally addressed through the selection of officers in an organization (often the case with the boards of nonprofit organizations as well as corporations). The leaders can even be selected by an external constituency (as in the case of elected officials who preside over a legislative body—such as in the case of the American Vice President who is selected by the general population rather than members of the US Senate).

All of this is now in flux with regard to both relationships and larger social systems. Not many years ago, control was assumed to exist in the hands of the male in a relationship—or to that person in the relationship with the greatest social status (based on race, ethnicity, socio-economic status, etc.) This assumed control is often now being challenged. White Anglo men, in particular, must no longer assume that they are in control. Negotiated control is now often required. In many instances, a bit of Goldilocks balance is sought by both parties.

At the broader group and organizational level, the assignment of leadership and control is now often a bit more confusing than it used to be. There is often a bouncing between a straightforward autocratic mode of selection and a more convoluted system of selection. The latter system usually involves selection by a small group of people (an oligarchy) and perhaps a pro-forma process of approval by a larger body. Even the process for selection of an American President and Vice President is now being challenged. We are collectively confused about the nature of authority and the role to be played by various stakeholders.

With this cautionary (and perhaps disturbing) note, we return to the matter of proactive and reactive. The similarities between the dynamics of inclusion and control soon disappear when it comes to the way in

which proactive and reactive behavior is exhibited in a social system – and the emotions that often accompany struggle for control in this system. First, proactive seeking of control usually shows up in a manner that everyone can see.  While the person seeking control might not be explicit about their need, the proactive quest usually is manifest in a high level of verbal activity (even dominating the airtime in their system and a high level (and ratio) of offering opinions (rather than just sharing information). I am reminded of the fellow I observed at the neighboring table. The proactive control seeker generally displayed a high level of energy and activity in the group or organization while members of this system are trying to sort out control and authority issues. There might be considerable maneuvering behind the scenes in the choice of a leader, but the move toward identified leadership at some point is explicit. It often moves rapidly if there has been significant work done "in the back room" (engaging the oligarchy I have mentioned.)

The dynamics of proactive control doesn't stop here. Even when the formal assignment of leadership has been completed, there are often continuing struggles regarding who is "really" in charge and how authority is really being distributed in the group. Is this the "real" leader, or is someone else or some other cluster of people actually "pulling the strings"? And what about the "loyal opposition" – those people who do not feel that their perspectives or interests are being represented by those in authority? How are the divergent perspectives and interests being addressed in the group?  Those members with a strong proactive need for control are likely to be quite sensitive to these issues, whether they are "in charge" or not. Finally, there is the matter of alignment with those who are in control. If I have a strong need for control, but I am not in control, then I need to consider ways in which to work with those in charge. Perhaps I can follow the lead of a collaborative colleague If I am successful in this alignment, then I have what is often called "referent power." I have the leader's ear" and can represent other members of the group in voicing their concerns and requests.

We can turn to the conversation being led by the loud and opinionated fellow at the neighboring table. How do those sitting at the table relate to him. Is the nod of agreement (or at least listening) enough? Is this a case of what the noted anthropologist, Gregory Bateson (1972), has called "schismogenesis"—the tendency of participants in a system to increase the contrast in their behavior as their interaction continues. Our fellow at the neighboring table talks more. Other folks at his table talk less. He talks even more. They talk even less. Is he talking more because he is becoming increasingly anxious regarding the maldistribution of airtime. It is indeed ironic that some people who become anxious about talking too much end up talking even more frequently to reduce their level of anxiety. Others at the table might have grown resentful of his conversational dominance. As a result, they decide to shut up and wait for the "loudmouth" to somehow and sometime stop talking.

When it comes to reactive need for control, there typically is much less obviously manifestation of this need. As the name implies, those with this orientation want other people to step in and take control or at least exert considerable influence. Those engaged in an interpersonal relationship are likely to be the quiet one in the relationship. They wait for the other person to start the conversation, are more likely to respond to a text message than initiate one and will wait for a dinner invitation (and then pay for the meal). Group or organizational members with a strong reactive need for control usually just sit back and watch the battle for control take place. Typically, they line up with the "Winner" of the control issue and are relieved when the issue of control is finally resolved.

Often, the reactive perspective on control is engaged by those who have been marginalized in a society or in a group. At the individual level, the marginalized person is likely to wait for cues from the person with whom they are meeting. They are more likely to make the adjustment to the other person's culture and mode of operating rather than the other way around. The marginalized person often comes from a strong tradition of being asked (or forced) to remain quiet and inactive while the decision regarding leadership is being decided. As a woman, minority, young person, or person with disabilities, the assumption is often made that they are automatically ineligible for a position of leadership---and they are not expected to be very influential. While their opinion might be tolerated ("All of us are interested in what you have to say… "), they often are hesitant to speak up. They assume that their opinion and advice will never be taken seriously or that their perspective will be placed in a box filled with stereotypes ("that is the way *those people* tend to think").

*Case Studies of Control:* As we did in the case of the need for inclusion, I wish to illustrate the dynamics of proactive and reactive control by offering a couple of brief case studies from my own work as a consultant. I first convey what happens when there is a predominance of reactive control—which is commonly found in intentional communities (communes). In many cases, these highly visionary and seemingly collaborative communities are struggling with issues about control, authority and leadership. While members of communes often desperately want to be living in a world of openness and trust, they often can't get past the issue of control (an important point that I will turn to later). The group is often dysfunctional when most members of a group don't want there to be any control (laissez-faire) or look passively for other people to take control.  Furthermore, this type of group is also quite vulnerable to being taken over by a highly charismatic leader. This is a persuasive person who offers not only absolute control but also a false paradise of absolute openness (requiring only a comparable absolute allegiance to them as leader).

I turn on the other hand, to an organizational consultation I completed with leaders of a major church in North America. This is a church that has a strong commitment to biblical values and aspirations. The leaders of this church were becoming increasingly concerned with the hierarchical nature of their church. They noted that the early Christian church (as described in the New Testament) was not hierarchical (perhaps an example of what today we would call a "self-organizing system"). Why not restructure their church so that it is less reliant on traditional modes of authority and control? They became architects who purposefully looked at existing models of nonhierarchical organizations (including the self-management systems being deployed in manufacturing firms such as Volvo). They didn't mind that these were "secular" institutions—they could still provide guidance.

Unlike those living in the Utopian communes with which I consulted, these church leaders were not running away from control. Rather, they were discovering ways in which to best allocate and manage control in their organization (church). They were trying (with considerable success) to create a "lukewarm" Goldilocks organizational structure that had integrity. These church leaders held the advantage of already establishing an I/Thou foundation of Trust. They connected with one another and collaboratively built trust because they shared a commitment to a higher good and higher (spiritual) source of guidance. It is with a strong foundation of Trust that we can best address the issue of Control. At the same time, when we have successfully addressed this issue then we have further enhanced Trust. The Cycle of Trust that I

mentioned in a previous essay in this series (Bergquist, 2024) seems to be potentially available in the world of Will Schutz's need for Control.

**The Need for Openness**

Openness concerns a willingness (even eagerness) to express and share thoughts and feelings with someone with whom we are relating, as well as other members of a group or organization. There is also an openness to innovative ideas, perspectives and practices. This is an often-overlooked dimension of Schutz's opened. Perhaps it is overlooked because it represents an often-elusive connection between relationship-based (interpersonal) openness and task-based openness to new ideas. This connection should not be overlooked—for the union of relationship-based and task-based openness is critical to the building of productive collaboration between two people and among members of a group or organization (Hershey and Blanchard, 1977; Gratton and Erickson, 2007).

The most challenging form of openness has to do with the genuine welcoming of people into a relationship or into our group and organization who are different in some important way from ourselves. It is in this openness to differences that we find the building of genuine community in our mid-21st Century life of global diversity. It is also in this welcoming that we find a powerful blending of concerns about inclusion with concerns about openness. Those who embrace this dimension of diversity wish to see beyond the current state. They look upward and outward in order to become inspired. They look upward so that they can better see their shared destination. They help other members of the group become inspired by the vision of a greater good—for their relationship, their team, their organization and ultimately their society.

*Key Openness Questions and Concerns:* The need for interpersonal openness comes to the fore when we are about to act. We must figure out how we are going to conduct ourselves—especially when we are relating to someone quite different from ourselves or working with members of the group/team who might differ in important ways from us and from one another.

Here are the concerns about openness:

(1) In what ways and at what times are we going to explore the fundamental way in which we are operating, and how do we go about changing our operations if they are not supporting safety and the honoring of diversity? To do this, we must speak candidly with the other person in our relationship. Trust must have been established with this other person—though as I have already noted, there can be a Cycle of Trust (openness begets trust which begets more openness which begets further Trust and so forth). Similarly, the group or organization must determine the extent to which members of this group or organization are willing to talk about what is really happening, and if the group or organization as a whole can trust what members of the group or organization are saying about the operations of the group or organization.

(2) How do we determine if the actions being taken by the person with whom we are relating or by other members of our group or organization align with what they say and what they espouse as their values and vision? How, in other words, do we assess and openly discuss matters of honesty and integrity? The term "authenticity" is often relevant in this regard. Once again, a Cycle of Trust might exist with Trust and Authenticity reinforcing one another.

(3) What is the appropriate balance between conversations that are task-based and those that concern personal and interpersonal issues—especially if these issues might impact on interpersonal, group or organizational functioning? The conversation itself should focus on both the Task and Relationships—as well as the Method of operating that best brings together effective task=related and relationship-related behavior (the TMR Model) (Bergquist and Mura, 2014). It is not enough to share feelings about the way in which we are working together. We also must share feelings and thoughts about the best ways in which to structure the task, make use of available resources, or even adjust spans of control, authority, support and influence that are associated with the task (Simons, 2005; Bergquist, Sandstrom and Mura, 2023).

(4) How do we appreciate, learn from and preserve those moments when relationship, our group or our organization seems to be functioning at its most effective level—with full participation by each of in the relationship, and by all members of the group or organization. There is a sense of joy in doing the work together, and a spirit of accomplishment that is energizing and renewing? This appreciative perspective can be offered in the narratives being shared, in the celebrations being conducted and in the statements of gratitude being offered. Once again, a Cycle of Trust can be created with Appreciation and Trust dancing together.

In order to address these four concerns, we must be candid with ourselves and those with whom we are relating. There are two specific questions which we must ask one another in establishing a trusting relationship, and we must ask one another in establishing a trusting group or organization: (1) How open do I want to be in sharing my ideas, experiences, concerns, hopes, and fears" (2) How open do I want other people to be in sharing their own ideas, experiences, concerns, hopes and fears? As in the case of both Inclusion and Control, there are proactive and reactive perspectives on Openness that lie behind the two questions being broached.

*Proactive and Reactive Openness:* The need for Openness parallels the need for inclusion and need for control, in that some people are quite willing – even eager—to share their feelings, hopes, fears and observations with other people, while other people are reticent to do so. They wait for other members of the group or organization to take the initiative. At the extreme are proactively open people who share their entire life history sitting next to an unfortunate stranger. Indiscriminate openness must be born on this aircraft. Many hours are yet to pass before the plane touches down on foreign soil. Regret is keenly felt about not purchasing a set of noise-cancelling headphones at the airport. At the other extreme is the reactively open person who can't easily be prodded into a conversation—even at the start of a team-building workshop. We carry the "interpersonal load" during a warmup exercise with this person. They smile and wait for us to produce something of mutual interest. The journey seems almost as long as that flight with the non-stop discloser.

In a relationship, proactive openness can be of great value—when engaged in moderation. It is important for each of us to gain a clear sense of another person's perspectives, values and past history if we are going to be working with them. Similarly, in a group or organizational setting, appropriate proactive openness can be quite valuable. We are not trapped on an airplane with a total stranger. There are contributing members who begin to share their own observations about group or organizational functioning. They may also share their own hopes for and fears about the group or organization's productivity with other members—no life histories, just task and group or organization related feedback.

In some cases (perhaps most cases) an important distinction must be drawn between openness about task-related issues, openness about relationships, and openness about the operations of the relationship, group or organization—what I have identified as the dimension of Method in a working relationship. All three forms of openness in the TMR Model are critical as the two of us or as members of a group or organization seek to become more effective. We need honest appraisals of how we are doing on the task, how we are doing in relating to one another, and how we are doing in designing the way in which we operate (to meet both task and relational needs). The two of us might decide to meet more often (or less often), meeting in some other place, or prepare an agenda prior to our next meeting. These are all Method related matters. Similarly, with open feedback in place regarding how we are operating as a group, we can consider ways (group methods) in which to do a better job on the task or on our relationships. Hopefully, we can find a way to blend task more effectively with personal and interpersonal issues—making the task more enjoyable to do and the relationships more satisfying precisely because we are getting things accomplished. Proactive openness certainly can be welcomed—just as proactive inclusion and proactive control are of value. Welcome to the pig roast (proactive inclusion). Here is what I think we need to accomplish today (proactive control). I would like to comment on what I think happened during our meeting yesterday (proactive openness).

Reactive Openness can be found among those who wait for others to take on the "interpersonal load." This often is of little value in sustaining a productive relationship. Fortunately, reactive openness can also be found among those people who are often identified as "good listeners" (or at least patient listeners). These are the folks who will sit there and listen to the stranger sitting next to them on the airplane (rather than putting on their earphones). The reactive openness folks on the airplane will actually ask some questions that produce an even more extended life narrative—but perhaps a narrative that is actually of some interest and relevance to the listener. At a much more productive level, we find the same kind of "good listeners" in our work setting. They might even be "active listeners" who move beyond the encouraging reception of another person's ideas. They provide clarification, expansion and critical appraisal of these ideas (Bolton, 1986; Mura and Bergquist, 2019; Gallo, 2024).

In a group or organizational setting, those with high reactive openness needs will wait for and even encourage other members of the group or organization to share their feelings, hopes and fears, as well as share observations about group or organizational functioning. While these reactive openness members of the group or organization are not always given the credit that they deserve, the contributions that they make can play a major role in transforming their group or organization into an effectively functioning system. While many groups or organizations would probably only find this role being performed by an outside, highly paid process consultant, there are those groups and organizations that are fortunate enough to have this role being played by one or more of their own members.

While the praise that can be heaped on these reactive members is deserved, it is important to note that the reactive openness member can also create problems in their group or organization. As someone who is participating in this group or organization, their own sharing is critical – beyond their listening and inquiries. We often find that the reactive member of a group or organization ends up feeling abused or ignored. While they will not willingly share their own feelings and observations, they do often expect that someone else in the group will ask them for their perspectives and observations: "Thank you for asking, here is what I have observed/what I am feeling." The output can be quite voluminous and often quite insightful – if perhaps a little late in the life of the group or organization. The voices that are not actively heard in the first quarter of a meeting often get ignored later in the discussion.

Furthermore, the comments being made by the reactive member can sometimes be filled with spite and are offered more as retribution (for not being asked earlier for their "valuable" input): "I could have told you so!"

There is also the matter of members with a low need for openness. These members will often not only be closed about their own feelings and perspectives, but also uncomfortable about anyone else doing much sharing. On the airplane, they are likely to request a change in seats – or certainly put on their headphones or pretend to fall asleep. Within a group or organization, they often will consider any open sharing of feelings or offering of observations about group functioning to be disruptive of the group's work on the task: "What's going on here, we're not one of those damnable therapy groups. Keep your feelings to yourself—or take them home and share them with your [spouse], not with us!"

The role played by closed-up members of the group often creates a barrier to the transition of the group to team. As I have already noted, one of the widely accepted guidelines for group process consultants is that the level of overall trust (and openness) in a group is no greater than that of the group member who is least trustful (and least open). As this person goes, so goes the group. As Amy Edmonson (2018) has recently reminded us, organizational safety is very important. The 20th Century strategy of "playing it safe" doesn't align with a VUCA-Plus environment. Too many unknowns swirl around us for us to play it safe. Success for Edmonson requires the creation of a safe environment that allows for innovative ideas, newly identified challenges, and slowed-down problem-solving (Kahneman, 2011). The closed-up member of a group is particularly sensitive to the lack of safety in their group. In many ways they serve as the "canary in the coal mine." They sound an "alarm" (often quietly) indicating that things are not "safe."

It is quite a challenge to bring this closed-up member of the group or organization to a point where they are sufficiently trusting regarding the intentions and interpersonal competencies of other members to become a bit more open. It will get even worse if they are coerced to be more open (by being repeatedly called on to share their feelings or observations) or are manipulated in an effort by other members to encourage openness (by effusively praising the closed member for sharing a bit of themselves). The best approach to take involves adopting a disciplined and appreciative approach in working with this member of the group or organization. In many cases, this involves acknowledgement of their discomfort (as a canary) and then finding ways to increase safety in the group. When the reticent disclosure does voluntarily offer some observations (usually task-related), one or more members of the group or organization can not only thank them for their observations but also briefly comment, in an articulate appreciative manner, on how this observation has actually contributed to group or organizational functioning. The observation has helped to move the group toward successful completion of the task. Not too much attention and not too little attention is given to the reticent member. A bit of Goldilocks once again.

*Case Studies of Openness*: As I have done regarding inclusion and control, I will share several stories about openness that comes from my own consulting career. I turn first to work with a leadership team in a major American bank. I was called in by a Senior Vice President who was recruited from another corporation to shake things up in this division of the bank. He was to provide some assertive leadership by driving the vice presidents working under him to be both more productive and more innovative (his bank was losing out to another major bank that had introduced new banking practices and was increasing its share of the banking market).

What our Senior Vice President found was that his reports had become even more conservative—and their departments had become even less productive. I was brought in (with a team) to help improve the situation. As part of our contract, my team conducted a series of interviews with all the Vice Presidents. Almost uniformly, they indicated that their new boss had been unsupportive and threatening. It was "either his way or the highway". My team was faced with the prospect of reporting these findings to our client. He was surprisingly open to our feedback. He suggested that my team share these findings with his entire group of Vice Presidents, and we did so.

After completed our report, one of the Vice Presidents stood up and declared that our report was fraudulent: "the Senior Vice President is a fine man and is absolutely supportive of our work. Sir, you should fire these consultants – they had not told you the truth." The room grew quite silent. We were preparing to leave very quickly and consider another line of work! Then suddenly one of the Vice Presidents (who we later found out was usually quiet in the group) spoke up. He indicated that the report we had delivered was quite accurate and that these criticisms of the Senior Vice President were often voiced in the backrooms (but never in front of the Senior Vice President).

Our courageous Vice President then said (we remember his words): "This is our one opportunity to make things better. If we can't be honest in this setting, then when can we be honest. We are all hurting and none of us want things to stay the same." At this point, several other VPs spoke up. They supported this very open statement. Now, the Senior Vice President spoke up. He indicated his appreciation of the courage shown by these members of his team. It is this kind of courage and honesty that he had been looking for when brought in to promote innovation. Work began on making this group of VPs become a team. Their progress over the following six months was very impressive – and this bank is now back in a much better position regarding market share. Miracles were not wrought, but important progress was made by this Senior Vice President and his executive group as the level of openness rose. Trust was on the rise. A Cycle of Trust (openness begetting Trust, etc.) was lingering on the sidelines—waiting to be ushered in.

There is one other story of openness that I wish to share. I was working with faculty members in an academic department located at a major American university located in the Pacific Northwest. We were in the midst of a three-day faculty development retreat held at a beautiful setting on a wooded lake. Members of the department were conveying some of their own narratives about why and how they got into the teaching business. The stories they were sharing seemed well-rehearsed. They had probably been heard by colleagues several times before. Nothing much was occurring, except some important reflections on how the world was changing. Therefore, the curriculum of their own department needed to be modified. Constructive dialogue was engaged--but pretty much standard academic stuff about the outside world. There was not much about the hopes, fears and aspirations of individual faculty members.

Then, as in the case of the bank Vice President, there came an instance of openness and honesty. This moment originated from an unlikely source. Much like the courageous Bank Vice President, there was a member of the faculty who had been quiet throughout most of the retreat. The retreat participants had been asked to describe the environment in which they feel most productive. What was the setting in which they felt most comfortable with their role as a faculty member? The quite member hesitantly spoke up. He indicated that he most enjoyed sitting in his den at home reading historical volumes that took him far away from the everyday world in which he was living. Since history is this faculty member's discipline,

it was not surprising that he is aligned with this practice of historical review and scholarship. However, he went on to share his fears about the world in which he is living. He indicated the following: "I am a very closed person. I don't open up with many people – even my wife and family." It was a remarkable moment. Ironically, this statement about being closed was the most open and honest statement made during this retreat.

His colleagues sat there for a few moments without saying a word. They were touched by his words and admired their colleague's perspective for perhaps the first time in many years. It was not only the curriculum that needed to be changed, but also the ways in which each of these faculty members had to live and work in a changing and challenging world. The retreat became much more productive as a result of this disclosure. The group member who was least trusting took a risk. He helped to raise the level of openness and trust among all members of his academic department. A Cycle of Trust was engaged for a short while in this wilderness setting. The faculty members had become a team. They made significant progress in not only updating their curriculum, but also becoming closer and more supportive of one another.

**Trust and Interpersonal Needs: A Personal Reflection**
I conclude this perspective on Trust and interpersonal needs by revealing an actual interaction I had with Will Schutz. This interaction occurred during a planning meeting that concerned an MA human relations program in which Will and I were both teaching. There was a significant challenge associated with convening this group. The leaders of this MA group had brought together a group of men and women who were accustomed to being in charge and doing planning by themselves. The episode I will share offers a display of Will's own sensitivity regarding inclusion, control and openness. It also illustrates the way in which fulfillment of these three needs relates to the achievement of Trust in a personal relationship, as well as in a group.

Will and I had known each other for several years (mostly in conjunction with this MA program). Will was much more "famous" than I was at the time. He was publicly more prominent than most of the other faculty members. He was at the top of this status-based totem pole. Yet Will treated me (and other members of the faculty team) with respect and deference. He did a beautiful job of managing the *Inclusion* of all team members (regardless of status). Will was also a superb facilitator of our planning team—a team that was filled with strong ego folks. He provided a thoughtful amount of *Control* and ensured that everyone felt influential as well as included. Finally, and most dramatically, Will Schutz exhibited and invited *Openness*.  He was quite candid in his expression of opinions and feelings regarding the process of our planning group and the nature of participation by all members of the group (including himself). A high level of Trust was established in this planning group – largely as a result of Will's contributions.

It is in Will's open expression of feelings regarding me that I found the high level of Trust to be most evident. My interaction with Will began after another member of the team offered a comment that was critical of an idea I presented. I was one of the most vocal, perhaps "mouthy" members of the team. Another member of the group came to my "defense." They suggested that this critical comment could dissuade me from remaining a participating and productive member of the team. It is at this point that

Will Schutz spoke up: "you don't need to worry about Bill Bergquist's feelings, he is so well defended that you would need to hit him over the head with a two-by-four to get his full attention!" Other members of the planning team sat silently. They were in shock regarding this "brutal" assessment of my character and defensiveness. While I was initially taken back by Will's comments, I quickly realized that Will had offered a "brutally" honest appraisal of how I handle negative feedback.

I spoke up and was quite honest (I believe) for a few moments. I indicated that I do use my psychology to fend off most negative feedback. I do the same with positive feedback. In fact, this "disclosure" on my part might itself be a clever defensive routine. I closed my statement by indicating that I needed to ponder about what Will has said. I would try to move past my defensive routine in order to absorb the insights and implications of what Will Schutz has offered me.

I believe that I could take in and absorb the harsh observations that Will made during this meeting because I had established a high level of Trust in Will. His competence, his intentions and his shared perspective (regarding human relationships) were evident in the role he played in the planning group. The group's achievement of inclusion, control and openness further enhanced my capacity to take in Will's comments. Safety had been achieved in this group—despite the significant challenge associated with bringing together these high-ego folks. I did spend a considerable amount of time reflecting on my own defensiveness and the ways in which I distance myself from many challenging interpersonal relationships. The impact of Will Schutz's comments continues up to today. I am sharing this episode for the first time in this essay on Trust. Even now, I have to consider if this sharing is itself an example of my frequently used use of objectification and intellectualization as a defense. Are the last couple of paragraphs mostly my defensive routine on display? Though he passed away in 2002, Will Schutz is still lingering in my mind and heart. Thank you, Will, for being a trusting colleague.

## Poetic Description of Steps to Trust: The Invitation

While the steps to be taken based on the guidance of Will Schutz will lead us to a trust-ful relationship with other people and with groups of people, I find that I ponder the deeper meaning of Trust. I wonder if the Essence of Trust resides ultimately at a level that insightful psychologists and consultants like Will Schutz can't quite reach.

I find myself searching for an analysis of and rendition of Trust that is both more soulful and filled with a sense of spirit (Moore,1992). I imagine that soulful Trust leads us down further into a meaningful relationship with other people and with groups of which we are a member. Conversely, spirit-ful Trust leads us up higher toward a more aspirational relationship with other people and with those who join us in seeking to create a better world.

### The Invitation

While struggling with this matter of Trust at the level of soul and spirit, I was clearing out some old papers to make room for documents related to my more recent books. There in the midst of these papers was a

copy of a poem/proclamation written by Oriah Mountain Dreamer (2024). Called "The Invitation," this widely known statement spoke to me directly regarding the matter of Trust. Bringing in his own wisdom as well as the wisdom of the Native American tradition from which he comes, Oriah Mountain Dreamer speaks to the Essence of Trust. He identifies the conditions that he looks to when establishing an authentic relationship with another person.

I believe that what he has to say relates to the matter of soul and spirit in a trusting relationship. Furthermore, as I carefully read *The Invitation*, I discovered four facets of Trust: Intentions, Integrity, Inspiration and Integration. I also found that each of these four facets were manifest in the two forms of spirit and soul. Spirit-ful Trust is based in the appearance of "real" (genuine) values and purposes that do not readily change. They are never just convenient. By contrast, Soul-ful Trust is based on the willingness to take risks in not only the actions we take in the external world but also our explorations of the world that resides inside us.

I wish to apply these distinctions to each of the stanzas offered by Oriah Mountain Dreamer. I realize that my categorizations do not do justice to the unique wisdom being offered by this Native American elder. I recall many years ago when I was attending college that Theodore Gill (President of the San Francisco Theological Seminar) suggested it is foolish and unfulfilling to stuff God into a specific theological box. I must similarly acknowledge that I am doing some stuffing and fully recognize that Mountain Dreamer's Invitations speaks to much more than the Essence of Trust. With this caveat in mind, I begin my exploration of this poetic account of Trust.

*Spirit-ful Intentions*: we come to trust other people when we feel confident that their intentions are clear (for them and us) and are held consistently. Furthermore, we are drawn to them when their intentions are lofty and worthy of our mutual engagement:

*It doesn't interest me*
*what you do for a living.*
*I want to know*
*what you ache for*
*and if you dare to dream*
*of meeting your heart's longing.*

*Soul-ful Intentions:* it is not enough that people we trust offer lofty dreams, they must also be willing to dig deeper and take a risk on behalf of these lofty intentions:

*It doesn't interest me*
*how old you are.*
*I want to know*
*if you will risk*
*looking like a fool*
*for love*
*for your dream*

*for the adventure of being alive.*

*Spirit-ful Integrity:* we trust someone if they are a bit bruised and battered—but are still true to themselves and are still open to a dream:

*It doesn't interest me*
*what planets are*
*squaring your moon...*
*I want to know*
*if you have touched*
*the centre of your own sorrow*
*if you have been opened*
*by life's betrayals*
*or have become shrivelled and closed*
*from fear of further pain.*


*Soul-ful Integrity:* it is also important for us to trust that the other person is knowledgeable about and appreciative of the opportunities that their bruising and battering bring to them—and the opportunities of bruising and battering that I bring to the relationship. As Nassim Taleb (2012) would suggest, we want to relate in a trusting manner to people who are not fragile (breakable) and not just resilient. We want to join in a trusting manner with those who are oriented (as we hopefully are) toward joyful and expansive growth through both achievement and adversity:


*I want to know*
*if you can sit with pain*
*mine or your own*
*without moving to hide it*
*or fade it*
*or fix it.*


*I want to know*
*if you can be with joy*
*mine or your own*
*if you can dance with wildness*
*and let the ecstasy fill you*
*to the tips of your fingers and toes*
*without cautioning us*
*to be careful*
*to be realistic*

*to remember the limitations*
*of being human.*

*Spirit-ful Inspiration*: the matter of Trust relates not just to what is "real" out in the world, but also to the construction of a trust-ful reality by the two of us. As Leslie Brothers (2001) has noted, we tend to create our reality at any one moment in time in relationship with other people—especially those we Trust. The reality we create with another person, in turn, allows for both disappointment and change. We create joint narratives that are founded on a clear sense of self (for both of us). This narrative, in turn, builds on and is inspired by a shared sense that there is something of greater importance and purpose than the two of us—Martin Buber's I/Thou (Buber, 1958).

*It doesn't interest me*
*if the story you are telling me*
*is true.*
*I want to know if you can*
*disappoint another*
*to be true to yourself.*
*If you can bear*
*the accusation of betrayal*
*and not betray your own soul.*
*If you can be faithless*
*and therefore trustworthy.*

*I want to know if you can see Beauty*
*even when it is not pretty*
*every day.*
*And if you can source your own life*
*from its presence.*

*Soul-ful Inspiration:* the challenges we face in our life (common under conditions of VUCA-Plus) are made less overwhelming if we can share them with other people in a trusting relationship. Trust, in turn, is increased if we can find and reliably count on the support and shared appreciation of another person. Together, we can be inspired to support and nurture those who are more vulnerable (fragile) to these challenging conditions:

*I want to know*
*if you can live with failure*
*yours and mine*
*and still stand at the edge of the lake*
*and shout to the silver of the full moon,*
*"Yes."*

*It doesn't interest me*
*to know where you live*
*or how much money you have.*
*I want to know if you can get up*
*after the night of grief and despair*
*weary and bruised to the bone*
*and do what needs to be done*
*to feed the children.*

*Spirit-ful Integration:* ultimately, a trusting relationship requires that both of us have somehow "put ourselves together." Parts of our selves do not remain isolated from one another. Our dreams include all parts of us ("good" and "bad"). The strengths and weaknesses that both of us bring to the relationship are all acknowledged and engaged in the "full-hearted" "fiery" life we engage together (for a few minutes or for a lifetime):

*It doesn't interest me*
*who you know*
*or how you came to be here.*
*I want to know if you will stand*
*in the centre of the fire*
*with me*
*and not shrink back.*

*It doesn't interest me*
*where or what or with whom*
*you have studied.*
*I want to know*
*what sustains you*
*from the inside*
*when all else falls away.*

*Soul-ful Integration:* perhaps most importantly, I want to know that you actually "like yourself"—including those parts that are hard to like. At some level, I suspect that we can only begin to truly 'Like" another person when we begin to "like ourselves." It might all go back to an insight that Erich Fromm (1956) offered many years ago. He suggested that we can only truly love another person when we have come to love ourselves.

*I want to know*
*if you can be alone*
*with yourself*

*and if you truly like*
*the company you keep*
*in the empty moments.*

Maybe it is as simple as this: the essence of Trust resides in love of self and other on behalf of something greater than both of us (I/Thou).

## A Trusting Relationship: The Invitation Accepted

I have been fortunate (blessed) to find this kind of trusting relationship with many people in my life. However, I want to focus specifically on one of these relationships. It is with the forementioned Gary Quehl, my long-term friend and colleague. Gary and I not only wrote the book about deep caring and generativity, he and I also wrote a book about civic engagement based on a project we conducted in Northern California. Furthermore, Gary was senior editor of a series of best-selling handbooks that I wrote about professional development and consulting in higher education. These books were written while I served as chief consultant to a major higher education association in Washington D.C. that Gary led.

There was something very special about working with Gary over several decades. He was success-oriented rather than being failure-avoidant. A success-orientation was rare and failure-avoidance was common among leaders of the D.C. higher ed community who tended to be housed in buildings around Dupont Circle in Washington. For Gary Quehl, it was important that we were successful in meeting the goals of at least one project—even if this meant failing to meet the goals of another project. We could strike out several times as long as we hit an occasional home run!  And home runs were aplenty in working with Gary in his leadership of one higher education association: major grants, significant national conferences, and long-term educational reform programs. I even wrote several widely cited books that conveyed the insights gained from these higher education projects. All of this meant that I could Trust Gary as a source of spirit-ful and soul-ful inspiration. In addition, I could Trust his spirit-ful and soul-ful intentions. I could take a risk because I know that Gary would catch me when I fell.

Gary's success-oriented leadership carried over to his position as head of another Dupont Circle organization. It was the largest higher education association in the United States. I was once again serving as a major consultant to Gary. We had some hits, but also some strike-outs. Gary was confronted by some very stubborn resistance at Dupont Circle—for he dared to suggest that the position of certain administrators in American colleges and universities be elevated. Gary left Washington D.C. after several years. He and I both went through a soul-ful journey of disappointment and frustration. We were both *weary and bruised to the bone.* Yet, our relationship remained intact and even deepened as we continued to collaborate and celebrate as dear friends.

There were also the successes and failures that Gary and I experienced on a personal level. Together with Gary, I *touched the centre of [my] own sorrow*—as did Gary*. We both had *been opened by life's betrayals*. Gary and I journeyed hand-in-hand through heart-breaking divorces and partial separation from our children. I remember spending evenings with Gary listening to sorrow songs (such as Sondheim's "Send in the Clowns"). We were sipping on a bit too much wine while lamenting our misfortunes. Gary and I shared

many a *night of grief and despair.* However*,* we would also both meet the wonderful women we would eventually marry. Gary and I were together when I met my future wife, Kathleen. Furthermore, I introduced Gary to his future wife, Bonnie. Together, Gary Quehl and I *risk[ed] looking like a fool for love.* He and I built a foundation of Trust that was based on both Spirit-ful and Soul-ful Integrity.

Finally, there is the matter of Integration. Over many years of being together, working together and feeling together, Gary Quehl and I have established both Spirit-ful and Soul-ful Integration. All aspects of our lives have been revealed to one another and have been accepted by one another. We both know what sustains us when things are going well. Even more importantly, we both *know what sustains [each of us] from the inside when all else falls away.* In many instances, these integrating sources of knowledge about one another accompanies the release of inhibitions. Together, we have *[stood] at the edge of the lake [or ocean] and shout[ed] to the silver of the full moon, "Yes."* This shout occurred on the deck of my cottage in Maine or on the edge of a hot tub at Gary's home in California.

The shouting celebration also occurred hand-in-hand with other people about which we both cared. I recall the wedding of Gary and Bonnie at the home which Kathleen and I owned and loved on the Coast of Northern California. I also recall the serenade that Gary and I provided to a dear friend. We sang to her during a summer conference held at a mid-west college. Gary and I had both been members of fraternities in college. We had learned the songs required to celebrate the "pinning" of a young lady by one of our fraternity brothers. Our friend had never been pinned as a young woman. Nor, as a Jewish woman, was she allowed to join a sorority at the college she attended.

Gary and I decided that our dear friend should be celebrated with song. It was a hot humid evening. She stood on a balcony with other women attending the conference. Gary and I stood below. We offered her every one of our fraternal songs of devotion and love. There was not a dry eye to be found on this balcony. Gary and I had declared our deep appreciation (even love) for our cherished friend. And we discovered a new alignment of Trust (Intentions) in one another. We found that we both cared deeply (generativity) about the damage done by antisemitism and other forms of hatred in our world. We helped one another enact this caring through song. Gary and I went on to celebrate the accomplishments and presence of many other people in our life. There were graduation ceremonies at my doctoral institution, special dinners with friends, and surprise appearances of one another at birthday celebrations. Gary and I joined hands and hearts to *stand in the centre of the fire . . . and not shrink back.* Each of us, with the help of one another, built a foundation of personal Trust (Soul-ful Integration) that has enabled us to *be alone with [our]self and . . . truly like the company [we] keep in the empty moments.*

Thank you, Oriah Mountain Dreamer for providing me with new insights about Trust.

And thank you Gary for manifesting Trust in our own long-term relationship . . .

## The Essence of Trust: A Final Graphic Representation of the Polarity Map

I bring this essay—and this series of essays regarding Essence and, specifically, the Essence of Trust—to a close by completing Barry Johnson's Polarity Map (Johnson, 2020). I incorporated the insights gained from

Will Schutz and Oriah Mountain Dreamer. I am also now at a place to "crown" this Map with the fundamental theme—the Essence—of this polarity exploration. It is the Essence of Trust. The analysis of polarities embedded in Trust helps to definition the tension within this Essence that provides it with energy. I consider the psychological steps identified by Will Schutz to be particularly relevant to the establishment of S² (Home) (security and safety) Trust, while the expansive steps poetically portrayed by Oriah Mountain Dreamer tend to most closely aligned with the O² (Quest) (opportunity and openness) forms of Trust. It is in the failure to manage this polarity in an effective manner or in the attempt to escape from these polarities that we find the opposite of Trust – this being Mistrust. I have tried to identify the settings and processes not only in which Trust prevails, but also those in which Mistrust is likely to be prevalent—and destructive.

This polarity map and attending analysis can be applied to the task of establishing Trust in any interpersonal relationship, group or organization.
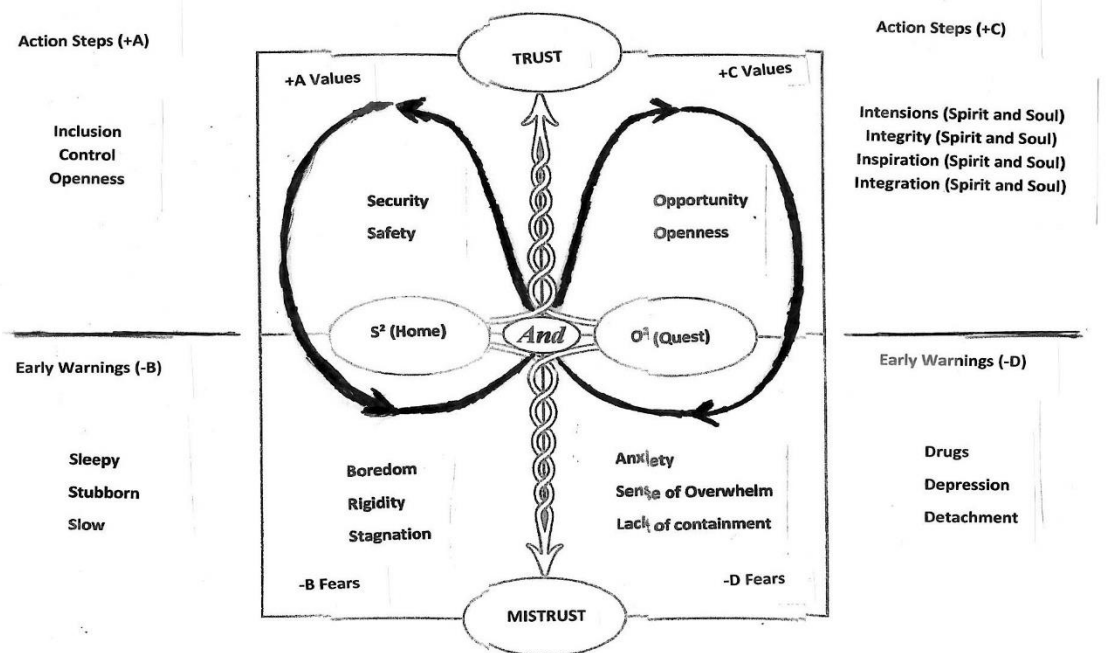


You might note that I have roughly darkened the lines and arrows representing movement between the S² and O² polarities. While Johnson represents this movement with soft, smooth lines (perhaps suggesting that this movement is often subtle and unacknowledged), I have represented the movement with rough bold lines and arrows—suggesting that the movement is quite dramatic, noticeable and rugged. Even a differing perspective offered by a change in facets regarding Trust can produce a disturbing disorientation. Shifting gears, abandoning bubbles of belief, and overcoming cognitive dissonance is rarely pretty, pleasant or perfect.

I would further suggest that the movement itself may become a matter of concern. It can buffer or block action. A "meta-level" polarity may emerge that addresses the basic tension between change and stability (non-change). There is often a push toward "trying something different" that is countered with a push

toward "keeping everything the same." This polarity often exists independent of and supersedes a focal polarity (in this case Trust). Change sometimes is a contentious issue in and of itself regardless of the polarity being engaged.

## Conclusions

I have come to the end of my analysis of the complex and dynamic nature of Essentials and of Essence. I have offered several ways of distinguishing between Essential and Essence. I wish to conclude by suggesting a "down-to-earth" example of how these two terms differ. I turn to sports for this distinction. During a baseball game, the essentials are those factors that lead to achieving a victory. They include the capacity to hit the ball to a place in the field where it can't be caught (offense), the capacity to run from base to base without being tagged out (base-running), and the capacity to catch a ball that is hit in your vicinity (defense).

By contrast, the Essence of a game of baseball is displayed at the moment when victory is achieved. There is minor celebration when one of the essential factors is displayed (perhaps a fist-pump, a shout of "hurrah" or a pat on the back or rearend when the player displaying the essential factor returns to the dugout. When the Essence of the game is evident—that is when one team had won the game—then the celebration is quite different. Players race onto the field, give each other a hug (regardless of the role played by the person being hugged), and often turn to those in attendance (if a home game) to share the celebration.

What does this "down-to-earth" example suggest/ First, the essentials of a ballgame concern short-term tactics. These tactics are engaged by individual ball players as they make immediate decisions about whether or not to hit the ball, race to the next bag, or position themselves to catch the ball. Second, the Essence of the ballgame is ultimately founded on longer-term, strategic decisions regarding who will play a specific position and what is the batting order among those who are playing the game. Winning of a game is attributed, ultimately, to participation by all members of the team—along with the manager and other members of the team management staff. They are all celebrating—not just the hero of this specific game (who might be the one interviewed by the press at the end of the game).

Even longer-term, decisions are made by the general manager (usually in association with the manager) regarding which players to recruit, retain, bring up from the minor leagues, send down to the minor league, and so forth. The Essence is all about winning games and hopefully ending up playing in (and winning) the World Series. Actually, when we explore the Essence of baseball, we find that there is actually two components—that provide the tension which make the Essence "glimmer" with energy and suspense. As I noted in a previous essay in this series, a game like professional baseball is played not just for one team to win; it is also played to generate revenues for both teams (regardless of which team wins the game). If one team always wins, then people will quit coming to the game and revenues from broadcasting will drop off. The strategic Essence is to win – but not win too often!

Similar dynamics can be identified when considering the Essentials and the Essence of Trust. Similarly, the Essential factors are those that contribute to the establishment of Trust in an interpersonal relation, group

or organization. In previous essays in this series, I have identified some of the Essential factors that contribute to the attainment of Trust. These factors are often related to specific decisions made by and actions taken by individual members of a social system. By contrast, the Essence of Trust is found and displayed at the moment when there is sufficient Trust to declare "Victory"—leading to the identification and full appreciation of Home ($S^2$)! Th Essence of Trust is also discovered and displayed at the moment when "Victory" can be declared with regard to the accumulation of sufficient Trust (competency, intentions, shared perspectives) so that one can begin a Quest ($O^2$) as an individual or as member of a group or organization.

All of this makes sense when considering a baseball game or the engagement and use of Trust in a stable, manageable setting. Even the polarities of Home and Quest can be readily managed under conditions of calm and certainty. However, a baseball game is played in a quite different manner during a rainstorm or when the players and fans face the threat of thunder and lightning. The players bravely play a bit differently when confronting this "messy" situation—or the game can even be called off. The mid-21st Century conditions of VUCA-Plus produce conditions that are threatening and messy. We are all "players" in this VUCA-Plus world.

I have proposed that a Lens of Trust resides at the heart of critical transformative processes when we are confronted with a storm of vulnerability, uncertainty, complexity, ambiguity, turbulence and/or contradiction. The challenging VUCA-Plus conditions can be transformed into integrative conditions of security and safety ($S^2$) (Home) alongside opportunity and openness ($O^2$) (Quest) when the Essence of Trust is secured. Trust resides at the heart of many transformative processes—and is to be prized as an invaluable prerequisite and desirable outcome in the navigation of our stormy mid-21st Century life and work. We would rather not cancel the game . . .

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