

Cliff's Notes

Polarity Theory and Integral Theory: The Polarities in the Integral “Multarity” (Interdependencies of more than two)

by *Cliff Kayser*

In 1967, C. West Churchman highlighted some key factors of unsolvable challenges. He referred to them as “Wicked Problems,” which are: 1) Unsolvable by rational analysis, 2) Systems issues, and 3) Require collective engagement for learning the way to solutions.

Another important voice in the solvability discernment arena is Ron Heifetz, who made the clear distinction between “Technical” problems (which are solvable) and “Adaptive” problems (which are unsolvable). Like Churchman, Heifetz highlights the requirement for using the collective intelligence of people at all levels to learn their way toward solutions. His work focuses on how traditional management strategies are useful in dealing with technical problems, but in situations where beliefs and values come into play, technical “fixes” tend to exacerbate the problem. While the “distinction is a crucial one,” he says, “leadership theory has only begun to address the latter.” In his book *Good to Great*, Jim Collins refers to this as “the Tyranny of ‘OR’” and highlights the importance of seeing when to tap into “the Genius of the ‘AND.’”

Starting in 1975, Dr. Barry Johnson identified the need to *supplement* problem-solving thinking (using “either/or”) with polarity thinking (using “both/and”). Polarities are defined “energy systems in which we live and that live within us.” One of the many gifts of polarities is that they work in predictable ways and contain potential for leverage in support of individual and collective well-being. The evolution of the key principles and Polarity Map™ has resulted in a powerful approach to accelerate collective engagement and learning. Performance is measured in real-time for multiple polarities, for multiple purposes, and at multiple system levels simultaneously (organization, team, and individual levels). The inherent tension is used as a resource to create sustainable competitive advantage referred to as “leveraging,” which is superior to false-choice trade-offs and even to “balancing” (considered a suboptimal goal or measurement outcome).

The business literature in the last half-century has referred to these challenges by other names, such as: Ambidexterity, Competing Values, Contradictions, Dichotomies, Dilemmas, Dualities, Dual Operating Systems, Dual Strategy Cultures, Hybridity, Paradoxes, Tensions, Theory X and Y, and Opposite Strengths – to name a few. In their review, Smith and Lewis (2011) found that in organizational theory, paradox studies have grown, on average, 10% annually between 1998 and 2008.¹ Three quotes summarize this body of research:

“I believe the central leadership attribute is the ability to manage polarity.”

Peter Koestenbaum

Leadership, New and Revised: The Inner Side of Greatness, A Philosophy for Leaders

“If your organization strategy does not account for polarity, then it is not strategic.”

Bob DeWitt and Ron Meyer

Strategy Synthesis

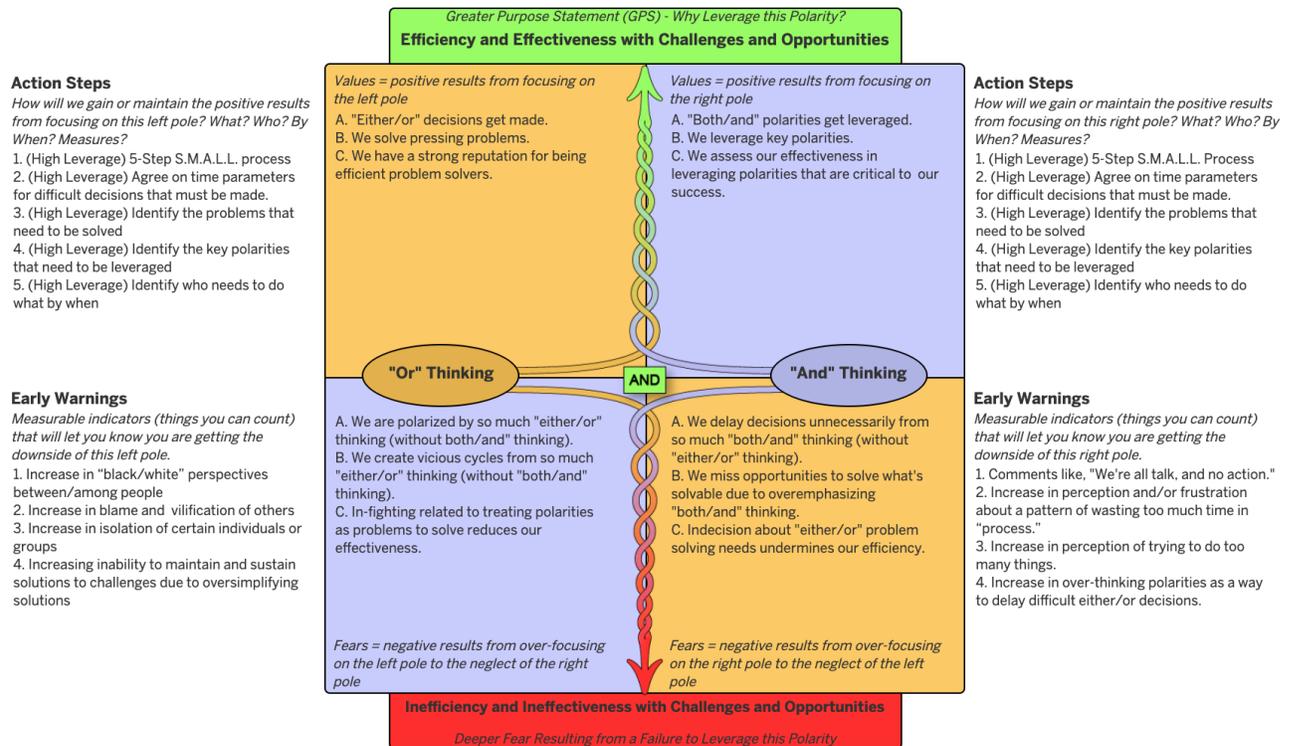
“The test of a first rate intelligence is the ability to hold two truths in mind at the same time, and still retain the ability to function.”

F. Scott Fitzgerald

¹ Smith, W. K., Lewis, M. W., & Tushman, M. L. 2011. Organizational sustainability: Organization design and senior leadership to enable strategic paradox. In K. Cameron, & G. Spreitzer (Eds.), *The oxford handbook of positive organizational scholarship*: 798-810. New York, NY: Oxford University Press.

Problem solving, while necessary and useful for solving problems, does not serve us or others very well when applied to polarities. When we treat polarities as problems to solve, individual and/or collective performance and well-being is undermined by reducing the speed, attainability, and sustainability of our desired outcomes and goals.

Solving problems and leveraging polarities is itself a polarity to leverage (See the interior portions of the Polarity Map™ for “OR” Problem Solving AND “And” Polarity Leveraging on the page to follow).



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The 5 Steps of the “S.M.A.L.L.” process, which uses The Polarity Map® are:

Seeing, Mapping, Assessing, Learning, and Leveraging

Seeing the benefits of both types of thinking and leveraging polarities once they’re identified is crucial for attaining and sustaining well-being. When we see polarities as distinct from problems, we can begin a process to support leverage by:

- 1) Reducing or minimizing the limitations in the lower quadrants; and,
- 2) Maximizing the benefits of the upper quadrants in service of the greater purpose.

The term “leverage” is another important principle. Leverage means that with less effort we can benefit by transforming negative, conflict-laden energy into positive, productive and collaborative efforts. However, before we can leverage a polarity, we need to know what the benefits and limitations of each pole of the polarity are, and we do this by **Mapping**. Then, by **Assessing** we can determine where we are. Assessing answers the question, “how much of the benefits and limitations are we experiencing?” **Learning** from this process informs what we need to do to create **Leverage**.

Let’s look at a common example of a polarity we all deal with:



Notice that we can’t stand outside Activity and Rest and decide whether or not to engage it – we’re **IN** it! We’ve been leveraging Activity and Rest our whole lives and will continue to do so, more or less well, as long as we are alive.

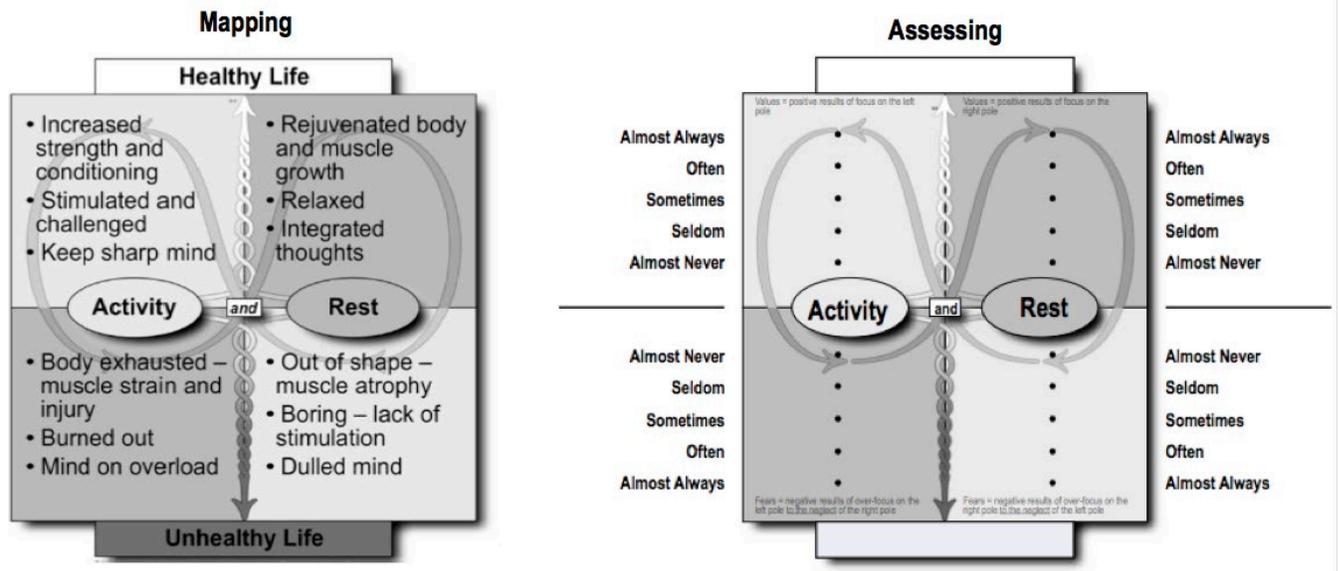
Seeing Activity and Rest as a polarity is relatively easy because the cycle times between the poles is relatively short.

Mapping Activity and Rest helps us appreciate the benefits and limitations of each pole of the polarity. The Greater Purpose Statement (at the top – “Healthy Life”) helps us appreciate the results of consistent attention (Virtuous Cycles) to both poles and their benefits over time. The lack of the Greater Purpose (at the bottom – “Unhealthy Life”) is the result of experiencing the limitations of both poles (Vicious Cycles) over time. (see Activity and Rest **Mapping** step, below.)

Assessing Activity and Rest involves looking at the items in each quadrant and applying a score using an Assessing guide (or just drawing a loop on the Polarity Map™ once you get the gist of how the assessment loops are scored and appear). Technology has been developed to assist in Assessing, which also makes assessing multiple polarities across an entire enterprise possible.

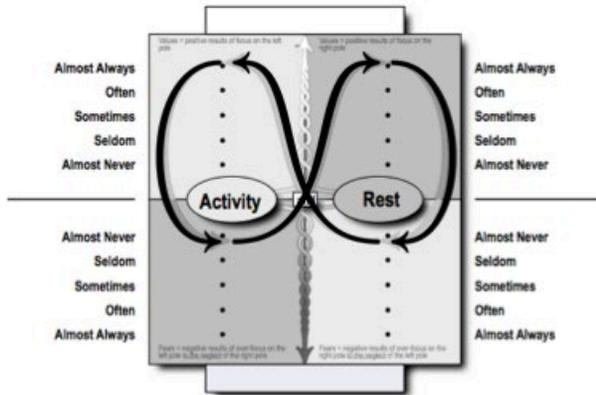
Quickly self-assessing involves drawing an infinity loop that connects scores from each quadrant. This can be done by giving a grade to each quadrant based on the frequency of the experiences of the items in each quadrant. The question to ask is, “Based on my experience I’d say the frequency is....” **Almost Always, Often, Sometimes, Seldom, or Almost Never**” and putting a check or “X” over the corresponding dot (see Assessing guide, below).

The degree of detail that is desired can be addressed by: 1) *More Detailed*. Scoring each item in the quadrant, and then averaging the total of all the scores in the quadrant to get an overall quadrant score, or 2) *Less Detailed*. Look at all the items in a quadrant and give them total “summary” grade based on your gut. Assessing each quadrant’s performance helps determine the degree of leverage that is currently taking place (see a few sample assessments on the following page).

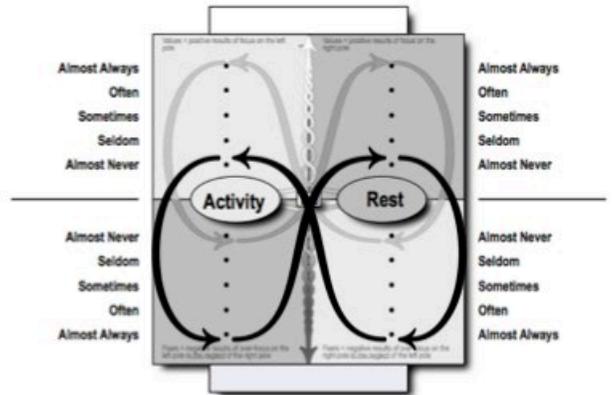


Poor leverage is the experience of one or both of the lower quadrants. For Activity and Rest, this puts our health at risk. Partially Leveraged or Balanced is an improvement over Poorly Leveraged, but does not represent the potential available or Leverage. Essentially, balance is basic maintenance or equilibrium (“Sometimes” for all four quadrants). When we Leverage a polarity, we are attaining the greatest amounts of *benefits* in the upper quadrants while minimizing the *limitations* in the lower quadrants.

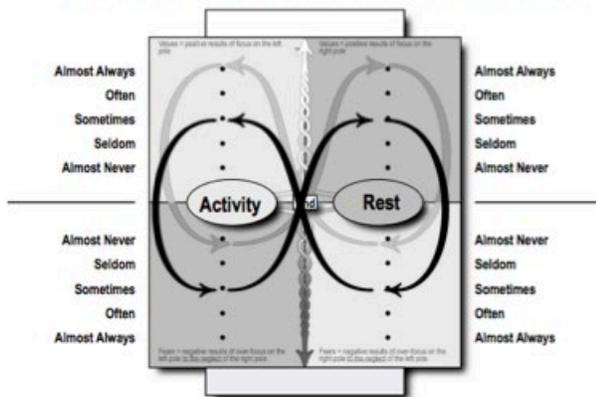
Assessing – Well Leveraged



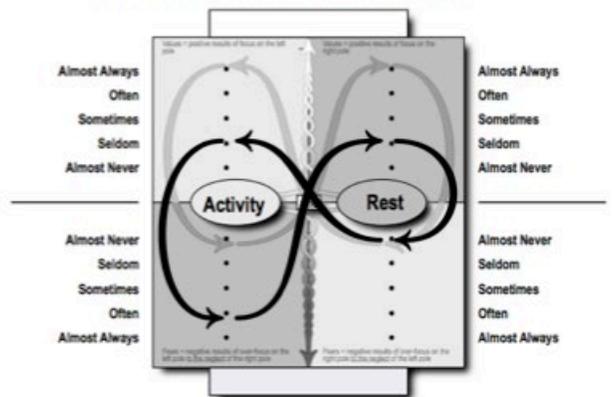
Assessing – Poorly Leveraged



Assessing – Partially Leveraged or Balanced



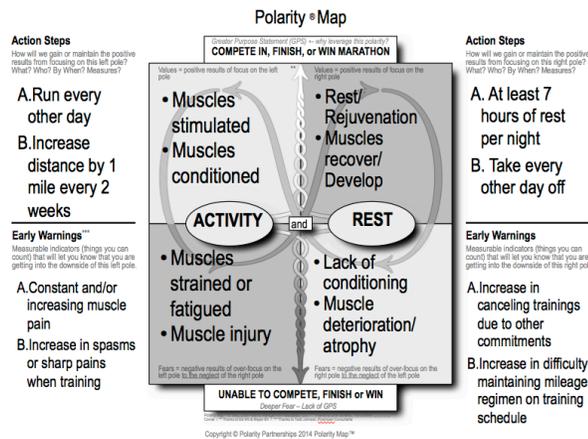
Assessing – Poorly Leveraged



The **Learning** step helps us compare where we are on our Assessing loop as it compares to the full potential of Leveraging. The fully leveraged infinity loop is, by default, watermarked into the Polarity Map™ as a reminder and way to compare the loop from a self-assessment loop. Seeing the two loops together is, as Max DePree once said, “Defining reality” which is “the first responsibility of a leader.” **Learning** from the **Assessing** step creates a bridge from the current state to the desired state (Leveraging in service of the Greater Purpose).

Here’s a quick **Learning** and **Leveraging** story. My sister, Lori, set a Greater Purpose to “Compete in, Finish, or Win a Marathon” which for her upped the ante in the need to fully leverage Activity and Rest (among other polarities). Lori is a cancer survivor and also lives with an incurable form of cancer. However, that doesn’t slow her down. She endeavors to live and do the things that bring her joy, despite her diagnosis.

Intentionally leveraging the benefits of Activity and Rest through Action Steps to empower both poles helps her improve her aerobic capacity and endurance through training (Activity) as well as recovery (Rest). Early Warning Signs help her anticipate the limitations of both poles. As a successful businesswoman with a demanding schedule on top of living with her diagnosis, modulating Action Steps and Early Warning Signs are key to managing her energy (see Action Steps and Early Warnings on the following Polarity Map™).

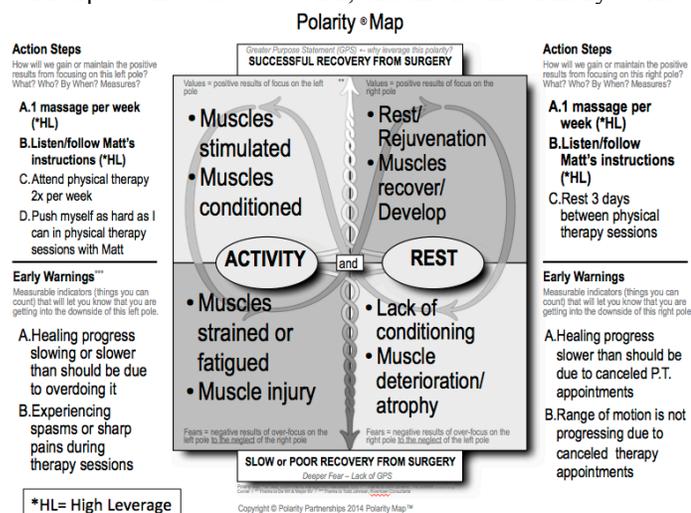


In 2008, a painful mass developed in Lori’s hip area, requiring surgery to determine whether her cancer had spread. The good news: it wasn’t cancer. The bad news: the surgery damaged a femoral nerve and she woke up in recovery to discover she had no use of her left leg. Overnight, her Greater Purpose for the Activity and Rest polarity went from running a marathon in spite of other challenges, to recovering from paralysis. Little did she know at the time that learning to walk again would turn out to be a 16-month journey.

The core elements of the Polarity Map™ -- the *benefits* and *limitations* -- of Activity and Rest didn’t change. She still needed to stimulate/condition muscles and rest/rejuvenate. She still had to be cautious about trying to do too much and strain her muscles and risk injury. She still needed to be cautious not to rest too much and risk deteriorating her muscles. What shifted considerably to reflect her new reality were the Action Steps and Early Warnings. She developed a few “high-leverage” Action Steps (noted as “HL” in the Polarity Map™ below) to support maximizing the benefits of both poles. She said those became significant factors in her recovery. One was “1 massage per week.” The other was to be vigilant about “Listen/follow Matt’s instructions” (Matt was her physical therapist).

Lori confessed at one point that even though she was in a great deal of pain, that isn’t what she found most challenging. Her biggest challenge was facing down the Early Warning Signs on the limitations of Rest. She told me, “Those ‘just give-it-up’ demons are formidable ... There are many days when I just don’t want to leave the house and feel beaten down by circumstances outside of my control.” When I asked her what gets her up and out the door on those days, she reminded me of the many bets she’d made with Matt and others on her ‘walk by’ date, which had pushed the odds. But after a pause, she added, “Sheer will moved me. My work was to summon that energy and keep it moving.”

Today, Lori is back to the Greater Purpose she started out with, and this is one of many stories that have made her my hero.



All of us are *IN* multiple polarities – too many to name! However, some polarities are particularly persistent for us at certain times in our lives or as a result of roles, goals, values, etc. Despite our best intentions, we can undermine well-being as a result of strong preferences for certain poles of polarities (this may lead to treating them as either/or problems to solve), and by the fears we hold about the limitations of the interdependent poles. As in Lori’s example, how we show up in them is key, and the S.M.A.L.L. process can be very useful in helping to generate awareness for appreciating a more complete picture of the dynamic. It may also support Coaches in work with Clients who need to summon the energy needed to keep moving in these tensions, and to support leveraging them.

There are common polarities that show up in our personal leadership, in our leadership of teams, in groups of friends, in families, and in organizations. The degree to which we can see and leverage polarities in our lives and work not only impacts our well-being but the well-being of others, too. Here are some examples of many polarities we could list:

Leaders:

Grounded AND Visionary
Planning AND Execution
Directive AND Participative
Self-assured AND Humble
Candor/Honesty AND Diplomacy/Tact
Logic AND Emotion

Teams:

Production (task) AND People (relationships)
Focus on Individuals AND Focus on the Team
Focus on the Team AND Focus on the Organization
Focus on the Team AND Focus on the Customer
Hold Responsible AND Provide Freedom

Organization Systems:

Continuity/Stability AND Transformation/Change
Margin AND Mission
External Focus/Market AND Internal Focus/Culture
Employee Focus AND Organization Focus
Organization Focus AND Community Focus
Organization Focus AND Environmental Focus

As you’ve probably noticed, when we talk about polarities we often refer to the “energy-system” or the “energetic dynamic” at play. While Lori’s story about leveraging polarity energy is a great example, a general analogy about energy may also be useful.

Most of us know that rip currents occur when waves break onto the shore from opposite directions, creating a powerful current that “rips” everything out to sea. If you don’t know how rip currents work and get caught in one while swimming, a perfectly *logical* decision would be to swim to shore -- *faster*. The best swimmer in the world can’t outswim a rip current, and that impossible effort will lead to exhaustion, becoming panicked, and, in a worst case, drowning. However, some people who know how the energy dynamic of a rip current works are able to play in what is life-threatening situation to others. Surfers ride rip currents out to the waves, catch waves and surf back to shore, and then ride the rip current back out again. They use the energy like natural conveyers.

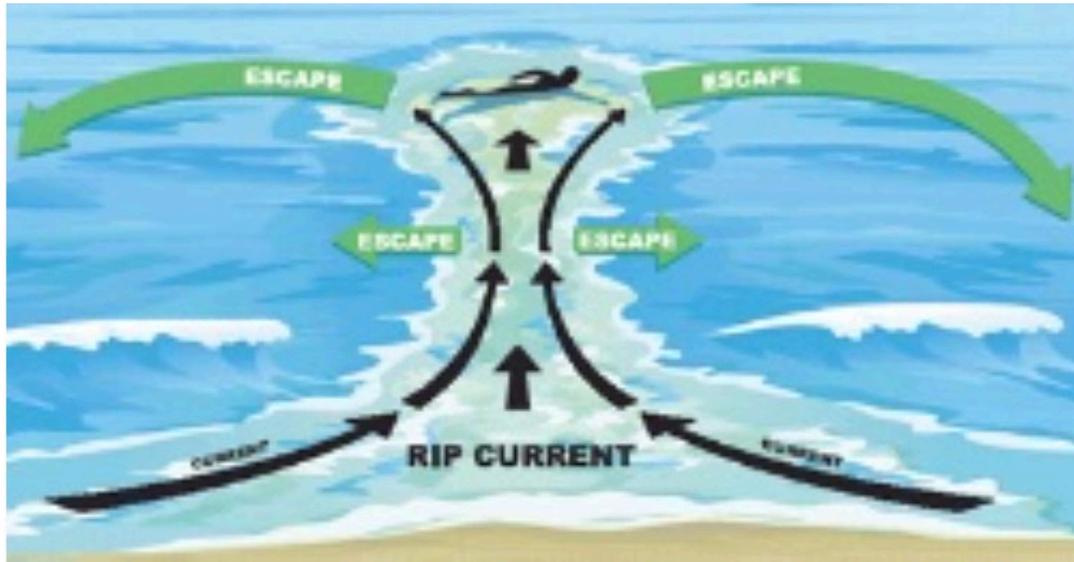


Photo courtesy of the U.S. Army Corps of Engineers
Field Research Facility at Duck, NC.

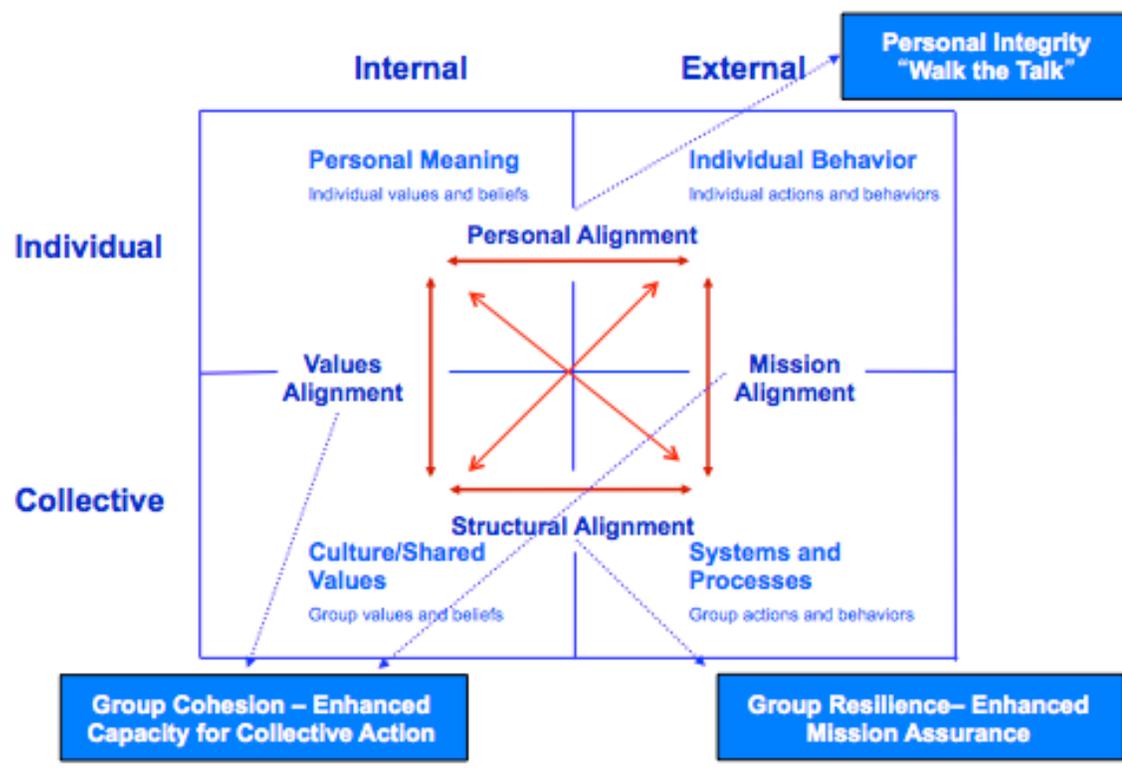
Trying to “swim” against polarity energy is similar to swimming against a rip current. And when we see how polarity energy works, we can leverage it much like surfers in rip currents.

Coaches and consultants can supplement and enhance their work by improving their client’s awareness of polarities in six ways:

- 1) Facilitating learning and results by helping both the coach and client to see the important distinction between a problem to solve and a polarity to leverage;
- 2) Creating awareness through powerful questions to support **Seeing** the two ‘poles’ of a tension;
- 3) Co-creating the relationship through the process of **Mapping**;
- 4) Facilitating awareness for how well or poorly the tension is being leveraged through **Assessing and Learning**;
- 5) Planning and goal setting by developing Action Steps and Early Warning Signs for **Leveraging**; and,
- 6) Managing accountability and tracking progress through focus over time on **Assessing, Learning, and Leveraging**.

The polarity process and Polarity Map® can also be applied to many existing leader, team and development frameworks to supplement and enhancement the appreciation for the energy dynamic, improve the practical application, and to measure performance. For example, Ken Wilber’s comprehensive Integral model can be broken down into a series of polarity maps. To follow is an overview of the Integral Model with two core polarities and six polarity maps that may be supportive for leaders, leadership coaches, and organization development professionals who use Integral Theory in culture and strategy work. It is also possible to measure and track performance on these and other polarities through the use of the Polarity Assessment™. Measurement matters – what gets measured tends to get done. Additionally, we can learn from measurement and in the follow-up dialogue. From meaningful dialogue, leaders, teams and organizational systems can make more informed and better choices about how to move forward faster and with increased sustainability.

Human Systems - Four Quadrants



A “multarity” is an interdependency of more than two. High on my personal list of favorite multarities (along with the Polarities of Democracy multarity: www.InstituteforPOD.org), is Ken Wilber’s Integral model. While comprehensive, the problem it’s the complexity – it can be overwhelming. Breaking down each element of the multarity into polarities helps simplify this complexity. This is demonstrated on the pages to follow, where each of the key components of the Integral model has been broken down by *Seeing* and *Mapping* each of the six practical elements. Having a general sense for how the energy dynamic works within each may be useful in focusing attention on the most important areas for a Client, or for kick-starting awareness of the energy dynamic within each. Polarities within the Integral model are:

Core Elements:

Individual AND Collective
 Interior AND Exterior

Practical Elements:

Personal Meaning AND Individual Behavior
 Personal Meaning AND Culture/Shared Values
 Personal Meaning AND Systems/Processes
 Individual Behavior AND Culture/Share Values
 Individual Behavior AND Systems/Processes
 Culture/Shared Values AND Systems/Processes

Each of the six polarities within the Integral model on the following pages begins with a high-level overview of what a Virtuous Cycle and Vicious Cycle “sounds like” in that tension. These descriptions are followed by a Polarity Map™ that identifies some possible ways the benefits and limitations might flow energetically in that particular dynamic. Of course, individual experiences will be different, and those differences can become a launching point for dialogue. The map is never the territory. However, like all maps, a Polarity Map™ may prove indispensable on the journey. Hopefully, this example will illustrate how polarity theory can supplement and enhance an existing theory and provide support for you as a Coach in your work with Clients.

We’re all IN these tensions at the intrapersonal level, interpersonally with others, and within the systems of which we are a part. Hopefully, we can become like surfers using and playing in the energy systems, or, at the very least, not drowning in them! A blank assessment map at the end of this article can be used for any of the maps for self-assessment.

Personal Meaning & Individual Behavior -- Greater Purpose = Personal Integrity

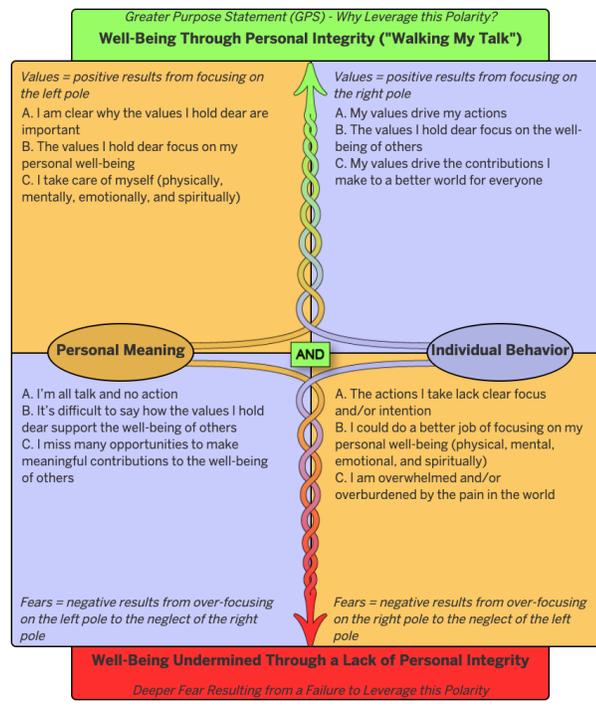
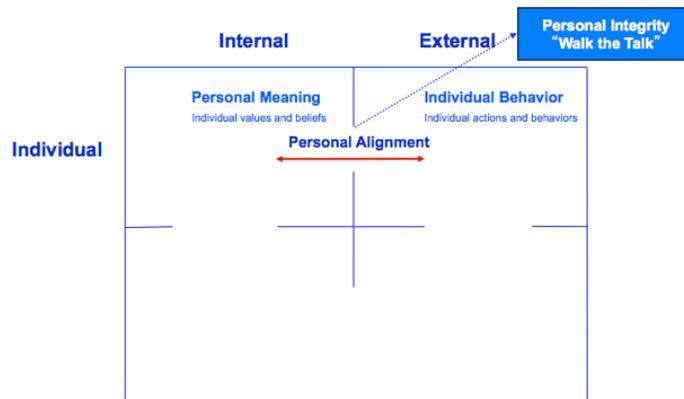
VIRTUOUS CYCLE MIGHT LOOK LIKE:

- When Personal Meaning is clear and it is backed up by congruent Individual Behavior (“Walking the Talk”), it gives authenticity to the Personal Meaning.
- Congruent Individual Behavior when paired with Personal Meaning brings action that is likely to serve individual and collective interests consistently.

VICIOUS CYCLE MIGHT LOOK LIKE:

- Personal Meaning in the absence of congruent Individual Behavior leads to questions about the veracity of the Personal Meaning or whether it really exists.
- Individual Behavior without Personal Meaning may appear reactionary to events and ungrounded, which may lead to those behaviors being less likely to serve the interests of the individual or the outside world well and/or consistently.

Human Systems - Four Quadrants



Personal Meaning & Culture/Shared Values – Greater Purpose = Values Alignment

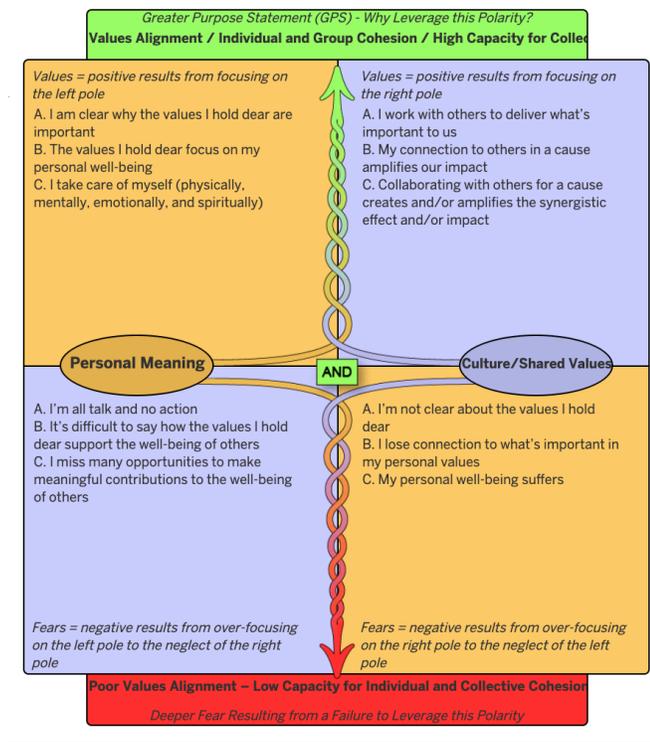
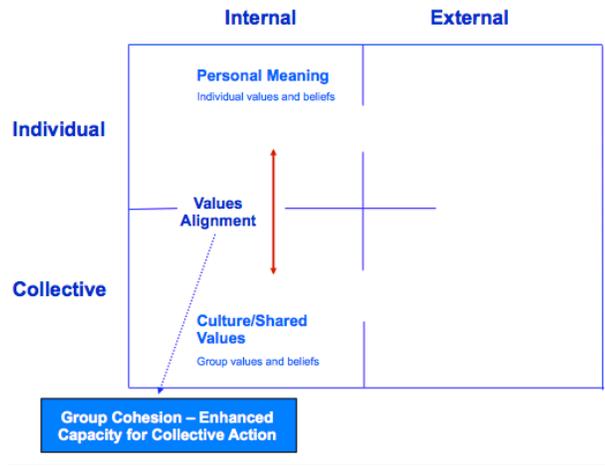
VIRTUOUS CYCLE MIGHT LOOK LIKE:

- When Personal Meaning is well matched with Culture/Shared Values, the individual becomes more engaged to make meaningful contributions.
- When Culture/Shared Values aligns well with the Personal Meaning of individuals, the potential for creativity and synergy among the individuals increases.

VICIOUS CYCLE MIGHT LOOK LIKE:

- Personal Meaning without Culture/Shared Values can lead to individuals becoming isolated and increasing inequality between/among individuals.
- Culture/Shared Values without Personal Meaning can cause individuals to become vulnerable to excessive group pressure for conformity, thereby losing the benefit potential that clear Personal Meaning could bring.

Human Systems - Four Quadrants



Personal Meaning and Systems and Processes -- Greater Purpose = Meaning Attainment Alignment

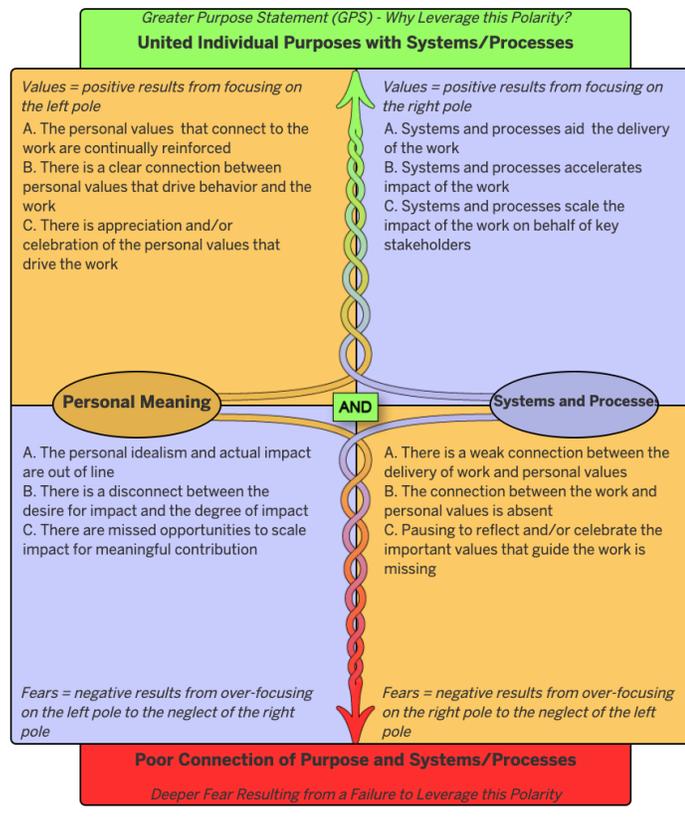
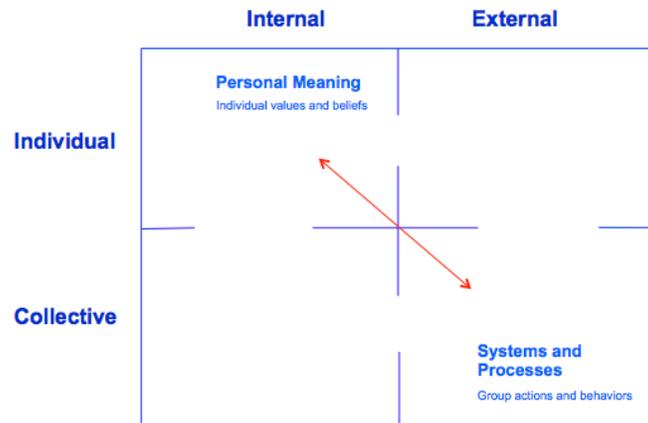
VIRTUOUS CYCLE MIGHT LOOK LIKE:

- When the Systems and Processes combine with Personal Meaning it reinforces enthusiasm for the personal passions.
- When Personal Meaning meets with Systems and Processes it helps turn dreams into reality.

VICIOUS CYCLE MIGHT LOOK LIKE:

- Systems and Processes that do not match with Personal Meaning create a block in the willingness and inspiration to contribute individual effort.
- Personal Meaning without Systems and Processes to bring that meaning out into the world can lead to an idealism that becomes self-indulgent.

Human Systems - Four Quadrants



Individual Behavior and Culture/Shared Values – Greater Purpose = Trust Alignment

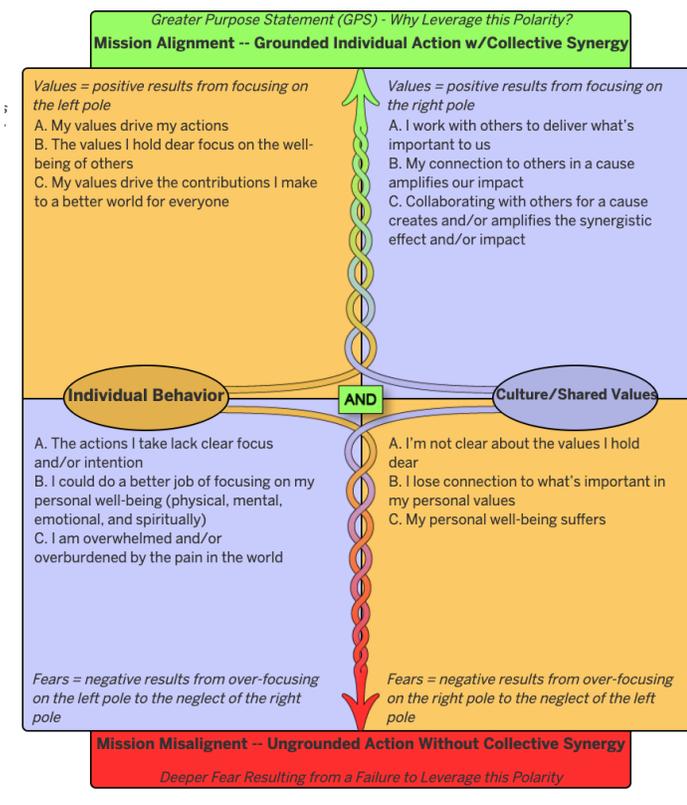
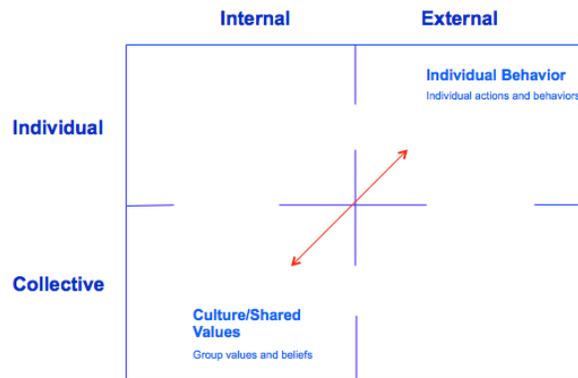
VIRTUOUS CYCLE MIGHT LOOK LIKE:

- When Culture/Shared Values is supplemented with Individual Behavior it supports the ability to deliver on the collective mission/vision.
- Individual Behavior with Culture/Shared Values contributes to creating collective synergy.

VICIOUS CYCLE MIGHT LOOK LIKE:

- Culture/Shared Values in the absence of Individual Behavior leads to questions of sincerity and authenticity in the shared convictions.
- Individual Behavior without Culture/Shared Values misses opportunities for maximizing collective energy and attaining synergistic results.

Human Systems - Four Quadrants



Individual Behavior & Systems and Processes – Greater Purpose = Mission Alignment

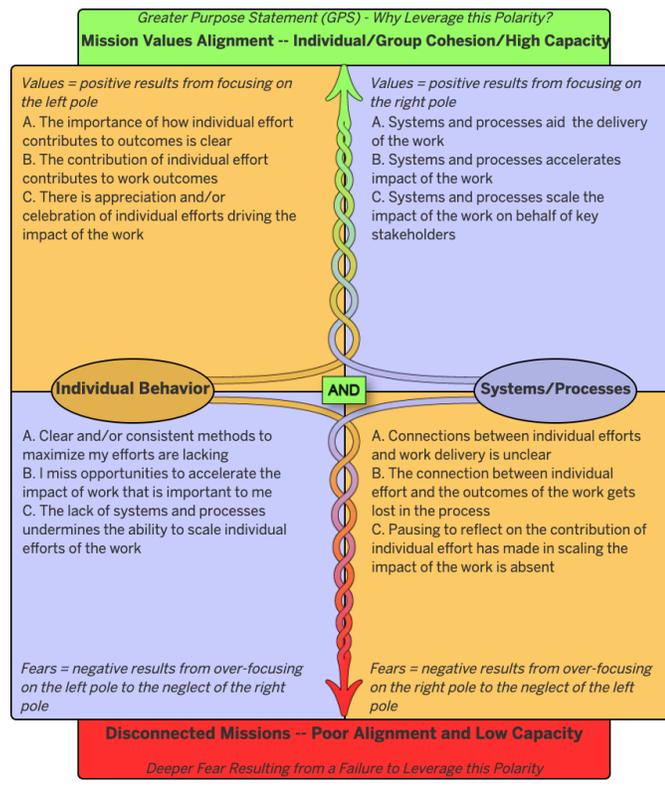
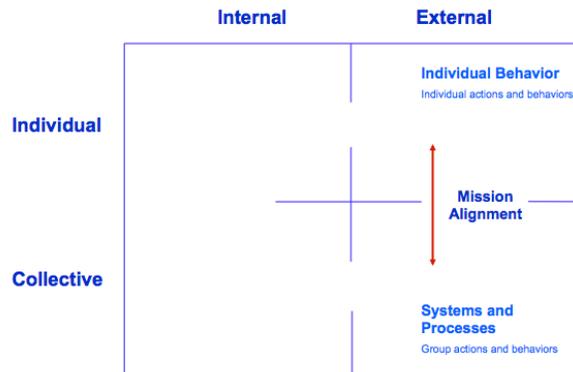
VIRTUOUS CYCLE MIGHT LOOK LIKE:

- When Individual Behavior is directed through Systems and Processes it supports efficient coordination to attain results.
- When Systems and Processes align with Individual Behavior, employee confidence and engagement increase.

VICIOUS CYCLE MIGHT LOOK LIKE:

- When Individual Behavior lacks Systems and Processes, lack of coordination, isolation and redundancies can result. (“Left hand does not know what the right hand is doing.”)
- When Systems and Processes are not supported by Individual Behavior the quality, consistency and volume of desired results may be undermined.

Human Systems - Four Quadrants



Culture/Shared Values & Systems and Processes – Greater Purpose = Structural Alignment

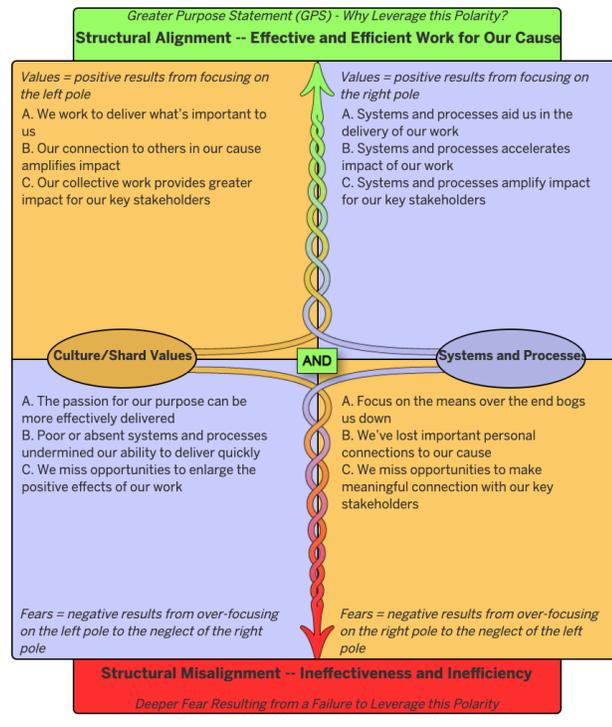
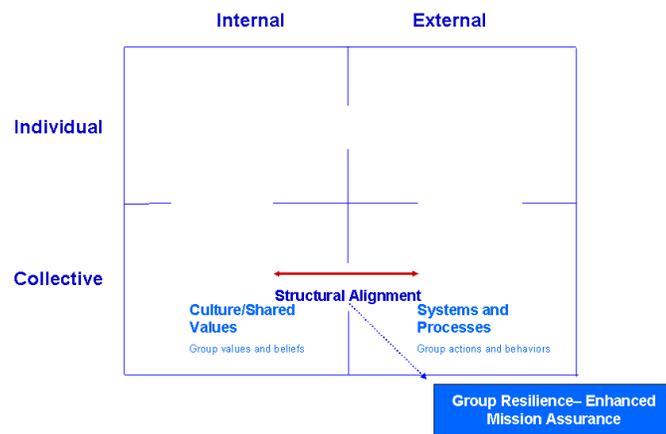
VIRTUOUS CYCLE MIGHT LOOK LIKE:

- Culture/Shared Values with Systems and Processes supports the mission/vision delivery (i.e., “I/We Deliver On Our Talk.”)
- Systems and Processes with Culture /Shared Values operationalizes and maximizes collective synergy for “hyper-leverage.”

VICIOUS CYCLE MIGHT LOOK LIKE:

- Culture/Shared Values without Systems and Processes appears hollow in the eyes of key stakeholders (“Collective Talk without the Walk.”)
- Systems and Processes without Culture/Shared Values results in actions that lack inspiration, engagement and meaningful collective synergy.

Human Systems - Four Quadrants



Sample: Polarity Assessment Results Summary Score for Integral Performance Management.

(NOTE: Details of performance for each polarity is not shown.)

Polarity Results for Integral Theory Polarity Assessment

BASELINE: All Responses

Total Responses



Compare Respondents

Polarity Summary



For more information about PACT™ (Polarity Approach for Continuity and Transformation) Certification Training and creating a Customized Polarity Assessment, and/or Licensing the Polarity Resource Portal for your company or organization, contact me!

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