

Editorial Introduction

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Integral Research (Cont.)

I am very excited to publish this second part of the special issue on Integral Research. In the editorial from last issue (vol. 3, no.1) I gave an overview of the emergence of this new field of mixed methods and then introduced each article. In this editorial I want to introduce each of the articles first and then conclude by outlining a number of the directions and tasks that lie ahead for Integral Research. In so doing, I will summarize what the 13 articles across these two issues have highlighted as well as draw out some of the implicit insights that occur in the context of this two-part issue.

In This Issue

The focus of this issue is on reporting research results, presenting “IMP coding” as a new Integral method for conducting research, and providing some meta-reflections on Integral Research. This issue opens with two articles that present the results of two original Integral Research projects. The first is conducted by a John F. Kennedy University (JFKU) student as part of his master’s thesis. The second is conducted by a JFKU faculty member as part of her ongoing exploration of the use of the Integral model in the context of international community development. The next two articles are Integral Research proposals by doctoral students at mainstream institutions who are using Integral Methodological Pluralism to guide their research. The last two articles take a meta-view on Integral Research and explore issues that we will have to take seriously as we strive to make Integral Research a more accessible and academically acceptable approach to the study of complex phenomena. The first four (of six) articles are longer than what we typically publish. I feel this is justified. As an emerging field Integral Research benefits from more detailed—and therefore longer—presentations of actual research conducted (the first two articles) and proposed research frameworks (the second two articles). Thus, I am happy to devote extra pages to our authors in this issue.

Original Research Reports

In “Integrally Researching the Integral Researcher,” Nicholas Hedlund provides a detailed report of the findings from his final research project and thesis. I have had the pleasure of teaching him for nearly four years, and I feel he is without a doubt one of the best students to come through the Integral Psychology program at JFKU. Thus, it is a real delight to share with the larger Integral community the exciting research that he has done. As you will see he has made important contributions in several areas to Integral Research, thereby justifying a more substantial overview. In this article Hedlund provides a first-person examination of a specific

meditation practice, Holding Loving Space, of which he is a long-term practitioner. In particular, he focuses on presenting the results from the first phase of his research wherein he examines phenomenologically and structurally the role his own awareness plays in enacting his exploration of the practice of Holding Loving Space. Hedlund uses a number of methods to accomplish his goals. Under the banner of phenomenology he employs autobiographical description, systematic introspection, critical self-inquiry, epoché, and psychodynamic shadow work. Under the banner of structuralism he uses an Integral Psychograph Assessment (see below) to assess multiple developmental lines and Riso and Hudson's Insight Approach, the RHETI 2.5, and embodied reading to assess his personality type. Through this combined inside/outside approach Hedlund makes a convincing case that the practice of Holding Loving Space is well suited for supporting post-autonomous ego development.

Hedlund's article makes four distinct contributions to Integral Research. First, the role of researching the researcher is a central one for Integral Research. The importance of identifying our Kosmic address is well established in Integral Theory. However, it is not so clear how to do so in a research context. Hedlund's detailed and honest exploration is an exemplar of how Integral researchers can go about documenting the role their own embodied awareness plays in disclosing and concealing the phenomena they themselves are studying. Hedlund explains how doing this makes Integral Research more "meaningful," "emancipatory," and "effective."

Second, one of the most noteworthy aspects of Hedlund's article is the rich phenomenological and structural descriptions provided of his vertical development and integration in the self-identity line. He charts in vivid detail his movement over the course of a six-year period from exiting the Conscientious level (Orange altitude) to entering the Autonomous level (Teal altitude). His discussion and examples of intrapsychic integration provides one of the only detailed presentations of what being Integral feels (phenomenologically) and looks (structurally) like. In other words, Hedlund provides powerful examples of what full-spectrum integration really is like from the inside and outside of a first-person perspective. Hedlund illuminates the kind of inner work we all need to do—working with our own psychic multiplicity—in order to connect lovingly and effectively with the multiple worldviews and perspectives outside of us.

Third, Hedlund's article provides the first published presentation of how to generate a psychograph combining first-, second-, and third-person methods: self-assessment through embodied reading, intersubjective feedback (informal and clinical), and psychometric assessment. Hedlund worked with an Integral psychotherapist (who by the way I have the good fortune of being married to!) over the course of 14 months to complete the Integral Psychograph Assessment. As such, this is a groundbreaking piece that will help others interested in operationalizing the psychograph for their own self-development as well as give clinicians a sense of how they might use a psychograph in their own work.

In addition to the many contributions already outlined above Hedlund also presents an Iterative-Reflective Design Model for Integral Research. This process provides a template for other researchers to use each phase of an Integral Research project to inform each subsequent phase. He articulates several cycles of research to be performed at various points in the process: *reflective inquiry*, *adaptive-projective inquiry*, and *synthetic meta-analysis*. In summary, to

borrow a phrase from Hedlund, this article does a wonderful job of demonstrating how epistemological subjects use methodological injunctions to enact ontological objects.

Moving from Hedlund's exploration of how to include an individual's interior within research, we shift our focus to Gail Hochachka's study of how various organizations include individual's interiors within their own efforts. In "Case Studies in Integral Approaches in International Development" Hochachka presents her Integral Research on six different organizations and how they include subjective and intersubjective dimensions in international development. Beginning with her Integral approach to her Master's thesis completed in 2001, Hochachka has been a pioneer of Integral Research. In fact, she is arguably the first Integral Researcher. Her book *Developing Sustainability, Developing the Self* (2005), which grew out of her Master's thesis, is currently the best Integral book available for demonstrating Integral-in-action. As such, her book is a valuable read for anyone wishing to apply the Integral model regardless of context and especially worthwhile to Integral Researchers. English and Spanish versions of her book are available for download on the Drishti website (www.drishti.ca). In this book she presents how she has successfully used an Integral approach to community research by making use of first-person/personal, second-person/interpersonal, and third-person/practical practices.

For years Hochachka has been doing on the ground Integral Research in Latin American and African communities. In this article she builds on that foundation and showcases her recent Integral Research on organizations doing development work internationally. She investigates organizations in India, Peru, El Salvador, Ethiopia, as well as a UNDP program in leadership. It is noteworthy that Canada's International Development Research Center (IDRC) funded her research. As such it is one of first government funded Integral Research projects and serves as inspiration for other Integral Researchers seeking third-party funding. Her guiding question is how do these various organizations integrate interiority into their approach to development and to what extent are they informed, if at all, by Integral Theory.

To begin with, she walks us through the traditional (charity model), modern (expert model), and postmodern (place-based or dialogical model) approaches to international development. She then introduces us to a wide variety of integral efforts to include interiority within development. One of the strengths of Hochachka's article is that it introduces and presents a spectrum of integral applications from integrative, intuitively integral, integrally informed, to full-blown AQAL-Integral. This typology will be useful for understanding Integral applications in any field. In particular, she has done more than anyone to document grassroots integral or "folk integral" efforts. Consequently this article is a great illustration of how Integral Research does not only occur in formal academic settings but also in informal community contexts around the world.

Hochachka summarizes each organizations focus and then proceeds to document how they work with interiors. In the process she takes a meta-view on the field of international development, identifying the growing edges of this important field and how Integral is helping to address problems that have long remained elusive to traditional, modern, and postmodern efforts. This report gives us a global snap-shot of integral currents around the planet. Her general findings include that all the organizations integrate interiors in their work with exteriors, they make use of unique methods and techniques for doing so, they make use of quadrants to support their efforts, and they work with levels of human development.

IMP Coding

Next, doctoral student Edward Kelly presents his research proposal for “An Integral Approach to the Buffett Phenomena.” In addition to being in a doctoral program in Ireland, Kelly is simultaneously getting a master’s degree in Integral Theory from JFKU. In fact, he was this year’s recipient of a \$4,000 Integral Research grant provided by the Integral Research Center, which he will use to help him carry out the research outlined in this article. There is no doubt that Warren Buffett is a living legend, not only for his unprecedented investment track record, which has made him the richest person on the planet, but also because he is extremely ethical, generous, humble, and an all around great guy. Thus, Buffett’s exterior success seems to be accompanied by interior depth. At the very least he is a complex enigmatic figure who defies simple explanation, which makes him and the phenomena that surrounds him a perfect focus of an Integral Research project.

Kelly situates his own research project within the context of mixed methods research. By doing this Kelly helps anchor Integral Research within a widely recognized tradition of combining qualitative and quantitative methods. At heart Integral Research is a mixed methods approach so we as Integral Researchers have much to learn from the emerging field of mixed methods. At the risk of over simplifying things modernism can be credited with establishing quantitative methods, postmodernism with establishing qualitative methods, and now integralism with establishing mixed methods. Various new approaches are taking the established methodologies of modernism and postmodernism and including them in an integral embrace. Thus, Kelly’s overview and discussion of mixed methods is valuable to any one considering doing Integral Research. As Integral Researchers we need to be familiar with the considerations and distinctions that mixed methods research draws on (e.g., the timing, weighting, mixing, and matching decisions that come with combining methods from various zones). Kelly does a great job of walking us through many of the research considerations involved with doing Integral Research.

Kelly uses two quantitative statistical tests (a binomial distribution and regression test) to analyze Buffett’s annual investment returns over the last fifty years. For his qualitative analysis Kelly has developed a new Integral methodology, “IMP coding,” to interpret Buffett’s shareholder letters. Using the eight zones of Integral Methodological Pluralism, Kelly creates a coding scheme for identifying which perspectives are present within the shareholder letters that speak to Buffett’s personality (1-p), his culture (2-p), and his investment approach and environment (3-p). Kelly presents in detail how he has developed his coding process and plans to use it. As a result, he provides a valuable illustration for how other researchers can use IMP as a hermeneutic tool of perspective analysis.

In a parallel integral universe to Kelly, doctoral student Jeff Cohen has developed independently a coding scheme based on IMP. It continues to amaze me how the journal will get article submissions of a similar nature at the same time almost as if each is serving as a strange attractor for the other. So when both Kelly and Cohen’s pieces were submitted within a month of each other I was (and was not) surprised. The fact that two doctoral students working on very different topics at very different universities each generated a coding process based on IMP suggests to me that such a method might become a standard approach within Integral Research. In other words, I can imagine IMP coding being one of a number of Integral methods commonly used by Integral Researchers.

Unlike Kelly, who is using IMP coding to examine the perspectives within letters written over a fifty-year period, Cohen is using IMP coding to examine the use of gender constructs within the social sciences of criminology, sociology, and psychology. Specifically, he is interested in assessing conceptual and operational approaches to understanding gender. He uses IMP to reveal how often a conceptual definition will be offered from one zone but then researchers will study gender based on an operational definition from another zone. These kinds of perspectival mismatches generally go undetected but they can severely limit research results and theoretical understandings.

Cohen begins his article by presenting a four quadrant understanding of gender that grew out of an Integral review of social science literature for his dissertation. Based on this review he identifies the following domains of gender: sex (UR), gender-identity (UL), gender-stereotypes (LL), and gender-roles (LR). He discovered that all four domains demonstrate a developmental progression from pre-differentiation to differentiation to integration. He then gives a detailed analysis of how these four perspectives are interrelated and in so doing provides one of the best descriptions of tetra-meshing I have read. In introducing his IMP coding scheme he provides helpful samples of both conceptual and operational definitions. In doing this Cohen is demonstrating how other Integral Researchers might translate each zone into their own project either for coding or more general purposes. Then to illustrate how he is using his IMP coding to expose methodological mismatches within scientific literature he provides an example from the criminology literature. So not only does Cohen provide us with a new method but he shows us what it looks like in action. Cohen concludes his article by presenting a multi-method approach to validity and explains the methods he is using to illuminate the “I,” “We,” and “It/s” of his own awareness: introspective journaling, structural assessment, external auditors, descriptive data collection, and a multiple coder strategy. Thus, Cohen uses the Integral model to build in first-, second-, and third-person reflexivity into the research process.

Meta-Views on Integral Research

In “Integral Research as a Practical Mixed-Methods Framework,” doctoral student Jeffery Martin provides an important article for the emerging field of Integral Research. Specifically, Martin highlights some of the pitfalls of using the labels associated with Integral Methodological Pluralism (e.g., phenomenology, structuralism, empiricism) to refer to the eight methodological families. Martin also points out some of the considerations that Integral Researchers will have to grapple with as they carry the IMP framework into more traditional research contexts as well as into mixed method communities. As a result, he examines some of the “core definitional issues” with IMP. He gives a number of illuminating examples of how methods associated with one zone can be used in other zones as well.

Martin makes a number of key points about what needs to be done for Integral Research and IMP to enjoy broader adoption by the academy and mixed methods researchers. He highlights the ways that the mixed methods community stands to gain from the use of the Integral framework. Martin makes a number of distinctions that will be valuable for Integral Researchers to consider. For example, he points out the difference between intra- and inter-study uses of Integral Research. He also identifies one of the major tasks in front of Integral Research: fitting the major methodologies and methods within the eight zones. He issues a call for Integral

Researchers to begin exploring and documenting the various combinations of methods that can be used in research.

This article provides one of the first instances of the emerging field of Integral Research reflecting back on itself. To date, I have been more focused on getting Integral Research defined and teaching students how to use it to conduct multi-zone research. Thus, Martin's observations and suggestions are very exciting in that they take the conversation to a whole new level and invite all Integral Researchers to begin considering the kinds of issues he outlines in this article.

In "Where Is the Method to Our Integral Madness?" integral theorist Mark Edwards makes a strong case for the need to develop a method for metatheorizing. He also presents an outline for an integral meta-studies composed of metatheory, metamethodology, meta-data-analysis, and metahermeneutics. As a result Edwards situates Integral Research in a larger context of meta-studies. Integral Research currently is most often understood as a version of metamethodology. However, it could be applied to each of the three other branches of meta-studies as presented by Edwards. For example, it can be used to develop a (meta)method for theory building by using first-, second-, and third-person methods to construct integral theories. Consequently, Edwards article has a liberating effect on Integral Research by expanding the integral context, thereby, like Martin, making a new kind of conversation and exploration possible.

One of the salient features of Edwards article is the invitation to develop a method to metatheorizing that either avoids the one person show that has historically accompanied metatheories or provides a way to validate, in a systematic fashion, metatheories produced by a single individual. For me what is exciting about Edwards' proposition is that it aims to develop or identify ways that we can keep fine-tuning, developing, clarifying, and rebuilding aspects of Integral Theory. For Integral Theory to continue to mature into a widely used meta-framework it will need to transition from being primarily a solo performance by Ken Wilber to being a collaborative effort by a team of qualified meta-theory builders. Such a transition will imbue Integral Theory with the autopoietic capacities it needs to continually reinvent—transcend and include—itsself according to its own principles. Wilber has created an amazing metatheory, but it is up to us and the scholar-practitioners who follow us to learn how to build metatheory so that we can re-model the theory as building codes in the field change and theoretical natural disasters strike.

Throughout the article Edwards introduces us to a variety of metatheoricians from various disciplines including George Ritzer, David Wagner, Joseph Berger, Bill Torbert, and Roy Bhaskar. I feel it is important for us as Integral Researchers to become more familiar with other metatheories and their theorists. In doing so we can expand our own integral horizons and give more depth and span to our own research designs. Likewise, familiarity with other meta-approaches engenders the kind of reflectivity and rigor that Edwards calls for in AQAL metatheory and Integral Research.

The Future of Integral Research

I am proud to point out that of the 13 articles in these two issues seven are from students or faculty associated with JFKU's integral programs. My hope and intention is that JFKU will

continue to be a leader in this new and exciting field of research. It is also worth noting that ten of the articles are by individuals who have gotten their doctorate in the last five years or who are currently working on their dissertations. Clearly, this is a signal that it is our current graduate students who are going to be adopting Integral approaches to their research thereby serving an essential role in developing Integral Research in the years to come. It is for this reason that I feel it is crucial for JFKU, Integral Institute, and the Integral Research Center to do everything they can to support graduate researchers who are interested in adopting Integral approaches.

One of the reasons I wanted to assemble a special issue on Integral Research (which quickly grew into two back-to-back instalments) was to begin a larger academic conversation about the issues and possibilities facing this emerging field. In general there are three main areas for us to focus on: application, theoretical clarification, and critical reflectivity. I will take them in turn.

One of the greatest contributions to Integral Research at this point will be simply to collect more examples of it. We need to participate in the documentation of how informal and formal methods are being used in a wide range of contexts. It is often through the actual application of Integral principles that theoretical issues and critical perspectives can emerge and inform subsequent efforts. Also, when we encounter other research projects we are inspired in our own research designs. An important part of applying Integral Research is the development of new Integral methods such as those offered by many of the authors in these two issues. The AQAL model and IMP provide us with a very creative space from which to enact new techniques, practices, injunctions, and methods. And with new paradigms come novel realities. As we generate new Integral ways of investigating reality we are going to be disclosing new Integral worlds.

Alongside rolling up our Integral sleeves and getting our research hands dirty we need to spend time at the drafting table in deep theoretical thought. To begin with we need to explore the definition of Integral Research. I have offered one in my article but this is to serve as a starting point. We need more people to get involved in articulating what it is that makes Integral Research unique. Much remains to be theoretically unpacked and developed within Integral Research. In particular, how can Integral principles be used in each phase of research: literature review, research design, data-analysis, interpretation, validity, discussion, and so forth. A crucial area in need of clarification is how to operationalize zone #5 and #7 into accessible methods. Right now these zones remain obscure to most Integral Researchers. Similarly, we need to begin to map the wide variety of methods onto the eight primordial perspectives. Doing this will go a long ways in clarifying the relationships between specific methods and the various perspectives of IMP. Likewise, we need to identify the possible advantages and disadvantages of various methodological combinations. We would also benefit from clarifying the role of Integral Research within intra-, inter-, and meta-studies (including metatheorizing and meta-data-analysis).

In conjunction with application and theory building we need to cultivate critical reflectivity. A hallmark of Integral awareness is a desire for understanding how your own AQAL constellation is enacting the phenomena you are encountering. Thus, for Integral Research is it essential that we develop robust ways of documenting, exposing, and investigating ourselves as researchers. Integral Research goes beyond the postmodern commitment to acknowledge that the research is part of the research. Integral Research insists that the researcher is actually enacting the research

in part as a result of their Kosmic address (e.g., their vertical and horizontal structures of embodied awareness). In addition to individual reflectivity we need community reflectivity that is mindful of how we as a group of scholar-practitioners are serving as a critical hermeneutic circle. We need to explore points of contact and difference with other integrative efforts (e.g., mixed methods, action research, and action inquiry).

In conclusion, I want to thank each of the authors in these two issues for providing such a robust overview of and invitation to Integral Research. The community of the adequate is forming! Overall I am very pleased with this special two-part issue on Integral Research and I am looking forward to developing Integral Research with each of you interested in contributing to this exciting new field within Integral studies.