BLUE MINDSET SUPPLEMENT

In 1977, Angelica Thieriot was hospitalized during a visit to San Francisco from her native Argentina. She nearly died from a mysterious virus, but after weeks of hospitalization, she recovered and was discharged. Her experience left her with deep dissonance: the high-tech environment was commendable, but the cold, impersonal care she received during her stay was highly traumatic. The experience inspired her to launch a crusade that resulted in the founding of Planetree, a nonprofit organization with the mission of promoting a new model of patient-centered care. The first Planetree unit opened in 1985 in a 13-bed medical/surgical unit at Pacific Presbyterian Medical Center (now California Pacific Medical Center) in San Francisco.

Today, the Planetree Alliance encompasses more than 60 designated health care sites worldwide and is an internationally recognized leader in patient-centered, community-based health care. At the heart of the Planetree approach is a codified philosophy that describes "who we are and how we interact with people, including how we treat each other as health care professionals." It encompasses aspects from building architecture to the language used by personnel. Becoming a Planetree affiliate begins with an on-site visit and assessment by a Planetree-approved organizational development specialist. A critical first goal entails winning staff buy-in through two-day staff retreats and "train the trainer" sessions. The national office also provides access to consultants with many different skills—from authorities in staff retraining to noise abatement specialists to interior decorators and lighting specialists—who contribute to the homelike comfort that is central to Planetree's approach to healing. In addition to initial retreats, every member of the staff is trained in the Planetree philosophy, with a minimum 10-hour introduction, plus annual retreats to reflect on practices. More than simply educating staff about the philosophy, most Planetree affiliates post the core program components on elevators, key chains, hall signage, and in their marketing materials. Planetree articulates a clear way of doing nearly everything.

THE PLANETREE WAY

The Mission

Case Example:

Planetree Healthcare System

To create a health care environment that supports the physical, emotional, and spiritual needs of patients.

The Goals

- To move away from a traditional task-oriented focus to a value-oriented focus

- To provide simple comfort measures for patients' families

- To bring families more directly into the care process, dealing with patients' personal needs

- To teach patients to take more responsibility for their care and empower them by giving them knowledge of their illnesses and care needs

- To pay attention to interactions with others—both with patients and other caregivers—to truly hear what their needs are in order to find ways to meet them

- To give human beings a purpose for living, offer joy, or inspire hope

The advantages to the patient are significant, and those hospitals that conform closely to Planetree's approach have enjoyed financial success in markets where other hospitals have struggled. Notably, Planetree hospitals report high scores on employee satisfaction surveys, in part because Planetree's employee selection process ensures candidates not suited for

its highly regimented approach are quickly screened out in favor of employees who present a better fit and are likely to be comfortable in a highly structured work environment.

MINDSET

This supplement, which accompanies the Stagen Understanding People module, draws upon the multidisciplinary research referred to as "integral theory and methodology," as presented by integral theorist Ken Wilber in more than two dozen books.[1] The Stagen Mindsets Model provides a summarized and simplified presentation of "meaning-making systems" designed for a corporate audience.[2] A summary of the leading researchers, whose work is reflected here, is provided in the endnotes section of this supplement.[3]

The Planetree approach succeeds because it attracts and nurtures a specific value system we can refer to as the Traditional mindset. Different researchers sometimes refer to people holding this Traditional worldview as "absolutistic" thinkers. They use the term absolutistic because the traditional perspective views the world in terms of concrete absolutes: right versus wrong, good versus evil, the "One True Way" versus all the alternatives. It may be helpful to remember this system's color code by using the association of the "true blue, blue-blooded" qualities of loyalty, order, and reliability that are among its chief characteristics.[4]

Traditional worldviews vary in the details of their beliefs (Blue religious fundamentalists of all stripes along with Blue atheist groups abound), but they share a common sense of being mission driven and a willingness to make personal sacrifices on behalf of their values and community. Pursuing a codified "right way" characterizes Blue thinking, which makes it useful for organizing and maintaining systems of cultural conduct and personal behavior. Blue conformity is often a result of the desire to avoid a sense of inner conflict that results from breaking the rules of the established order, as well as avoiding the outward consequences that may result from such a trespass. For the Blue mindset, the established order is valued above almost all else.

Blue thinkers value and require conformity and predictability. This rigidly ordered approach is only viable for a limited number of organizations.

Typically, the Blue mindset is adopted in response to the need for stability. From the Blue perspective, there are right ways and wrong ways of doing things, and any middle ground should be avoided.

The 2004 presidential election highlighted the predominance of Blue thinking. Some organizations, such as information technology firms and professional services companies, may have less than 20 percent of their workforce utilizing Blue mental models, whereas other industries, such as many manufacturing and retail firms, may acquire up to 80 percent of their staff from a Blue demographic.

Blue thinkers espouse what is referred to as a "traditional" perspective. Traditional simply means that those holding this view embrace the cultural norms of the time and place where they were socialized. Blue thinkers are often heard longing for the simplicity of earlier times, wistfully

referring to "the good old days," failing to notice that their perspective does not take into account that "what used to be" varies tremendously from place to place.

The Blue mindset is rigidly rule-based. Traditional thinkers are sometimes criticized for their inflexible version of morality.

Yet, society relies on the "rule of law" for the legitimacy and success of every business transaction, and this foundation reflects the codification and enforcement of Blue values.

The foundation of Blue values upon which developed societies are built is sometimes overlooked, depreciated, or taken for granted, in part because Blue ethics are usually insufficient to negotiate complex situations and scenarios containing multiple variables, diverse perspectives, and a significant level of abstraction or nuance. As Blue thinkers sometimes themselves acknowledge, they do not "do nuance well." They admittedly prefer to see the world in absolutist terms of black and white, with few (if any) gray areas.

However, as the Planetree case illustrates, it would be a mistake to assume the simplicity of the Blue mindset indicates a lack of intelligence. Value systems operate independently from IQ, and Red, Blue, Orange, and Green thinkers can exhibit low, average, or high intelligence. At Planetree, for example, neurosurgeons, cardiovascular specialists, Harvard-educated administrators, and highly qualified nurses who share traditional values have all found the heavily Blue culture to be an extremely satisfying place to work.

COMMON BLUE PERCEPTIONS

The purposeful, sacrificial nature of Blue thinking tends to include a protocol for forgiveness. The Blue thinker is aware there are other perspectives, but prefers to have them framed as "right or wrong." Some beliefs common to the Blue mindset include:

• Structured routine makes right, and practice makes perfect.

• Power is conferred upon those who live in the Truth long enough.

• My country—love it or leave it.

• "Do unto others as you would have them do unto you."

• Discipline of mind, body, and heart are essential.

• Most people inherently like work once they have some training and some guidance and will do their best if they believe in the organization's mission.

BEHAVIOR

Interestingly, this kind of absolutistic thinking tends to focus on the behavioral realm. What one does is almost more important than what one says (or thinks), and Blue behavior tends to conform to group norms. Success on the job may be interpreted in terms of punctuality, politeness, observing dress codes, acting in accordance with protocol, and following instructions unquestioningly. It is tempting to belittle these behaviors, but Blue correctly reminds us that the traditional perspective is an essential element of society's socio-political stability.

Alcoholics Anonymous is an exceptionally positive example of the power of Blue discipline as an avenue for personal growth. Other examples of the Blue mindset are found in such films as A Few Good Men, When We Were Soldiers, and Pleasantville. The singing of national anthems, the books The Book of Virtues and The One-Minute Manager, the National Rifle Association, and the Promise Keepers social movement all typify Blues.

that points out areas of performance or competencies that are lacking or need to be improved. However, they do this using language to build others up rather than tear them down. When giving constructive feedback it is important to consider the other person's feelings, be discreet, and keep it simple.

CAPABILITIES

While mindset and capabilities are not a hundred percent correlated, some useful generalizations can be made to better understand people whose primary mindset is Blue.5 Unlike those with a predominately Red mindset, the Blue thinker is able to control and direct their impulses and desires and to delay gratification in service of something greater than egocentric drives.

A Traditional thinker's focus on "right or wrong" leads to a reliable adherence to codes of conduct and protocol.

The Blue thinker is capable of not only handling routines and discipline but of thriving in circumstances that might be viewed as tedious or overly regimented to those with a different mindset.

SOCIAL SYSTEMS AND ORGANIZATIONAL STRUCTURES

Blue thinkers thrive with clear guidelines, rules, and routines. When managing or leading Blue thinkers, there should be specific rewards for compliance and clearly defined consequences for failure. Work environments and processes requiring a high degree of abstract thinking will not suit the Blue mindset. Because they appreciate hierarchy and clear chains of command, Blue thinkers are also well served by positional (authoritarian) leadership, crystal-clear communication, and role/task clarification relating to specific rules, deadlines, and responsibilities. Blue thinkers also tend to appreciate a written code of conduct, especially one that offers clear protocols for action.

Blue thinkers tend to excel in structured environments because they value regimented order and consistency. Consequently, they perform well in small work groups inside classic organizational hierarchies with clear reporting structures. The US military's strict rules, procedures, and chains of command are good examples of Blue codification.

The preference for the status quo, regimented consistency, and codified order make Blue thinkers good candidates for repetitive tasks requiring attention to detail and strict adherence to standards. Blue thinkers staff many accounting, quality control, and compliance departments.

CULTURAL CONSIDERATIONS

Blue thinkers are likely to be drawn to and thrive in "sacrificial," rule-based careers such as certain types of police work, nursing, accounting, or clerical work. While they excel at following rules and procedures, those with a Blue mindset sometimes have difficulty understanding the reasons behind the rules.

Traditional thinkers are especially motivated by a call to mission. Shame is another powerful motivational element, especially when understood not as humiliating disgrace imposed by others, but as discretionary or self-imposed shame as catalyzed by certain forms of feedback. This form of shame, rare today, includes tact, sensitivity, mutual respect, and a respect for the guiding values the person shares with those with whom they prize connection.6 Some Blue thinkers relate to this emotion more as guilt. In the case of either shame or guilt, these emotions are extremely powerful motivators for Blue thinkers. The twin guiding beacons of purpose and discretionary shame are helpful as the person learns to see themselves as the object of others' evaluative attention.

Blue drives have much to do with learning and understanding the rules of conduct of life and livelihood as well as the application of self-discipline, conscientiousness, and hard work toward fulfilling dictates. The rules and norms of the person's group (company, church, and nation) are not viewed as one of many alternatives; rather, they are the one and only "right way." A hallmark of absolutistic thinking, alternative views are dimly perceived or dismissed as wrong.

BLUE ETHICS AND MORAL VALUES

Sociologists and developmental psychologists refer to Blue ethics as "interpersonal concordance" and a "good boy/nice girl" orientation. That which is "right" is pursued by playing a "good" or "nice" role, defined as being concerned about other people and their feelings, maintaining loyalty and trust with partners, and dutifully following rules and expectations. Blue thinkers attempt to fulfill the roles and expectations of those close to them, and being good means showing self-sacrifice on behalf of others. It also means loyalty to relationships, mutual respect, expressing gratitude, and invoking some version of the Golden Rule from the person's respective culture and tradition.7 To the Blue mindset, good (conforming) behavior is viewed as the path to please others and gain approval. Within the Blue value system, there is great conformity to stereotypical images reflecting mainstream or majority behavior.

Of course, ethics and morals have become a hot topic in recent years along with the "culture wars" often cited in the media. And, the term *moral values* has come into frequent use reflecting both a sincere interest in the topic as well as a widespread misunderstanding of what it actually means. Oddly, few people, including many outspoken politicians and religious leaders, actually understand the nature of ethics and so-called moral values. Ethics concerns itself with what a community or group considers to be good for the individual and the collective. Moral values are those principles, ideas, and behaviors that a particular mindset deems right and good in relation to the whole. What proves particularly difficult is that those crying out for moral values rarely realize that these values differ depending on one's mindset; the values of one mindset are, in fact, the vices of another. Without this understanding, people make the serious mistake of demanding that others adopt their values along with their limited version of what is right and good.

Blue morality is rule-based and rigidly dualistic (black and white). It contains a strong emphasis on obedience to perceived authority relative to varying contexts, be that a boss, employer, law enforcement officer, government leader, religious leader, or God.

Interpretation of traditional texts (and teachings) is dictated by an individual's religious affiliation and the culture in which they were socialized. Absolutistic atheists, Islamic fundamentalists, traditionally minded Chinese communists, Orthodox Jews, and Christian fundamentalists may all share a Blue mindset, but will not share the same details of their culturally derived beliefs. Yet, each will be convinced that their "one right way" is in fact the only true version of reality. The one right answer is the answer provided by the trusted authority.8 According to Clare Graves, the pioneering values researcher of the 1960s, "If you believe there is only one right way, and if those beliefs of the 'one right way' happen to have developed in different parts of the world, and have different details in them, then there are going to be clashes that develop between these 'one right ways.' And so this is at one and the same time the most peaceful and the most warlike of all of the systems that we have. If you agree with it and bow down to the higher power that defines what behavior is right and what is wrong within the system, things are just fine. If you vary, then you have a very, very difficult time with the fight that ensues."

In some cases, people (and groups) with the Blue mindset may fail to sufficiently understand or take into account another person's interior dimension and may—regardless of the other person's underlying intent—want to punish them for exhibiting external behavior that deviates from established (mainstream) convention.[9]

Examples

•   A person who does not share the same values and beliefs may be viewed as "wrong" or "immoral" for behaving in ways in which the Traditional thinker would not approve.

•   A person with a Blue mindset may criticize another person's or group's expression of sexuality (including on television or in film) as "wrong" because they view sexual expression as indecent or immoral in any forum.

•   Many Traditional thinkers from Middle Eastern cultures view Americans' adoption of Orange (Achiever) values and behavior, expressed through capitalism and freedom of expression, as immoral because this kind of thinking and behavior deviates from their Blue values and traditional conception of what is right and good. (This dynamic is playing out in very dramatic ways in geopolitics.)

ENDNOTES

1. Research that has been incorporated into this presentation includes the work of: Ken Wilber, Robert Kegan, Susanne Cook—Greuter, William Torbert, Clare Graves, Jane Loevinger, Lawrence Kohlberg, Jenny Wade, Don Beck, Chris Cowan, and Paul Ray. Within their respective fields, each investigator conducted independent research and analysis into the nature of varying mindsets and their correspondent values. The models these researchers created to map their discoveries exhibit startling similarities. Despite employing differing terminologies, these models point to an underlying commonality that demonstrates the reality of categorical mindsets common to varying human groupings. These underlying, organizing similarities and the principles implicit to them are supported by extensive empirical data and peer—reviewed scienti'ic evidence. A summary of these and nearly 100 other models is provided in Ken Wilber's book, Integral Psychology, and elaborated upon in many of his other academic works.

2. The Stagen Mindset Model represents an intentionally simplified presentation — a teaching convention — that was designed to allow non—academics, especially business professionals, to use some of the most practical and impactful insights of cognitive science, developmental psychology, and neurology without having to possess a working knowledge of these fields. The Mindsets Model is designed to be—first and foremost—practical and user—friendly. Individuals interested enough to explore what lies behind the mindsets will find a treasure trove that draws upon state—of—the—art research in the fields of constructivist—developmental psychology, cognitive neuroscience, biopsychosociosystems theory, value theory, and consciousness studies. While the Mindsets Model is informed by developmental studies and supported by cross cultural research that demonstrates the complex interface between various systems of meaning—making, it is beyond the scope of this simplified, user—friendly model to delineate these nuances. Put another way, the question of why a person "constructs" the world through a particular mindset, and how these constructions evolve over time is a consideration reserved for in—depth, academic investigation and analysis. For practical purposes, it is sufficient to recognize that individuals exhibiting a wide range and great depth of personal and professional competencies have access to multiple, and often all of the mindsets reviewed in this material. In other words, versatility and competence—and therefore success—is directly proportional to the number of meaning—making systems an individual can recognize and embody.

3. Leading theorists Loevinger, Kohlberg, Graves, Kegan, Wade and others' independent research with diverse methodologies and populations resulted in conclusions that are not only consistent with regard to this mindset, but are uniformly recognized and described in the wider academic literature. This mindset is thought to represent a large proportion of the adult population in developed nations, and is accordingly described as conventional, institutional, conformist, and traditional. According to Wade, this mindset's most obvious characteristics are conformity and its affiliation with established institutions (both in terms of organizations and traditions). Loevinger refers to this mindset as "conformist" and describes it as "Belonging to a group and being identified with it are the benchmarks for achieving a conformist orientation... [conformists] strive for approval and acceptance, and especially seek to conform to the dictates of authority within their reference groups. Standards for appearance, behavior, and preferences preoccupy their thinking. Self—esteem is engendered through acceptance and approval by the group rather than through simple hedonistic rewards [as compared to the Red mindset]. Needs are conceptualized in stereotypical ways, which confuse individual and group differences. Dualistic judgments of 'right—wrong' and 'good—bad' result in rather simplistic categorizations of people... Niceness and helpfulness are directed toward the groups that define their self—concept. Prejudice and fear are directed toward outsiders. Wade points out that "the conformist person engages in behaviors because he should ("what would people think?" and "everyone does it," whatever the referent group: decent people, Americans, cool guys, Baptists, Nazis, my friends, IBM employees, etc.)... As suggested by the random listing o' group memberships above, the content o' the normative structure for the Conformist person is, in some ways not important. Thus, the contrast among Shiites, Boy Scouts, valley girls, Brown Shirts, Republicans, and Jesuits lends a superficial variety to some behaviors expressed by Conformists that belies their single noetic source... The dynamics of Conformist consciousness can embrace human rights, religion, genocide, etc. — any belief system that can be dogmatized. In fact, it is not unusual for individuals to belong to, or identify with, groups whose beliefs are logically mutually exclusive without being troubled by the conflict." C. Graves, C.L. Hughes, and V.S. Flowers, emphasize that conceptualization is limited to absolute and dualistic thinking (right/wrong, good/bad, black/white). I. Berg, B.M. Bass and D. Riesman point out that polarization includes dividing the world into member groups and outside groups. According to researchers V.F. Flowers and D. Heflich, the past takes predominance in consciousness and determines — because of its precedence — what should happen in the future. A person with this mindset tends to view the future as a straight—line extrapolation of the past. He has difficulty envisioning possibilities outside history or experience. Summarizing conclusions from D. McC|elland, C. Graves, V.F. Flowers, and C.L. Hughes, Wade explains how envisioning a future controlled by the past partly determines the self—sacrificing behavior, emphasis on duty, etc., that distinguish this mindset: "good" behavior now will be rewarded, if not during life, then after death.

4. As seen in Ken Wi|ber's seminal textbook Integral Psychology (and many other works), integral theory and methodology adopted a values color—coding scheme originally developed at the National Values Center under the direction of professors Don Beck and Chris Cowan. his convention has proven to be extremely use'u| and has seen widespread adoption among integral researchers, theorists, and practitioners, as the use of color—coding highlights the categorical similarities between theoretical mindset models while overcoming the varying terminologies employed by each.

5. The subject of capabilities is addressed at length in the Stagen Human Performance module under the categories of cognitive capacity, emo:ional capaci:y, rela:ional (in:erpersonal) capacity, e:hical capaci:y, wisdom capacity, and wellness capaci:y, People's capacities in these areas are not strictly correlated to mindsets, however, there are some useful generalizations about what a person is likely to be capable of based upon their primary mindset.

6. As distinguished by Carl Schneider, Shame, Exposure and Privacy; 1992

7. Each of the world's major religious traditions has a version of the "Golden Rule" which, incidentally, is worded very similarly to the version with which most Western—European and American demographics are familiar. For more information about psychological development as it relates to faith, see James Fowler's highly recommended book, Stages of Faith: The Psychology of Human Development.

8. Researchers WC. Perry, I\/\.F. Belenky, B. Clinchy, N.R. Goldberger, and J.M. Tarule, as well as numerous social psychologists have explored the cognitive/affective domain of self—identity by exploring the Absolutistic thinker's relationship to authority. This mindset not only includes absolutism and duality as a chief characteristic, but also attributes knowledge of the "one right answer" to authority. According to this worldview, authorities have the power to bestow this absolute knowledge that individuals (with this mindset) accumulate through obedience, self—sacrifice, and hard work.

9. Wade summarizes a point, which is agreed upon nearly universally in the wider academic literature, that for a Traditional thinker, the rules and norms of a person's member group are not viewed as one of many alternatives; rather, they are the "right way" and all other possibilities are either dimly perceived or dismissed as wrong. Wade also suggests that such power'ul dualism indicates that the brain's limbic system is largely dominating subjective experience. According to P. I\/\acLean and R. Restak, this evolutionarily ancient part of the brain cannot tolerate ambigui:y. It is only organized to resolve inputs as affective (emotional) polar opposites: pleasure (all positive emotions) and pain (all negative emotions), as well as familiarity and strangeness, which greatly influence social behavior. As a survival mechanism, the limbic system rejects any perceived threat to self—integrity (in this case, that which does not conform to or confirm "either/or" thinking), while adopting and incorporating anything that reinforces the accustomed perception of the self and the outside world. According to L. Festinger, for Conformist (Blue) thinkers, "affec: dominates and colors reason... permitting quasi—logical arguments (rationalization) in the service of emotional (usually egoic need." Wade cites many examples of people with simultaneous memberships in logically inconsistent groups without significan: conflict, and points out that the limbic system is untroubled by logical inconsistencies that would confound the left neocortica hemisphere, yet it is clear that both brain centers are very active [with this mindset]..." Wade cites M.S. Gazzaniga, P. MacLean, and A.H. Rosenfield's independent research on the biological correlates of conflict arising from the physiologically distinct parts o' the brain, and explains, "Conflicting data from different parts of the brain, the limbic system in this case, are given to the lef: neocortical hemisphere to interpret the only way it can — logically. The left hemisphere then constructs a "rational" explanation for the limbic system's dictates. As the old mammalian brain, the limbic system prefers cues from the inner world over information from the outer world supplied by the neocortex. The two sources of data create an internal conflict between what is "known" and what is "felt." The limbic system has the advantage, though, in creating strong affects and convictions of truth without any confirmation from the environment — feeling over fact — and then having the neocortex rationalize that choice. Thus, challenges to the self—now identified socially by its roles and membership identities—are met with extremely negative, emotional responses impervious to reason or logic, but often possessing a superficial reasonableness supplied by the left hemisphere's need to rationalize."