The Breeze of Freedom

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One of my colleagues recently left her long term residence in China and is now living in a country that is currently much less restrictive than what she knew in China. She speaks about the fresh breeze of freedom that now swirls around her. I wonder what this fresh breeze must feel like for her. Just as important, I wonder what this breeze feels like for me, when I encounter it. It is important to pose this question for me (as well as for her) because I find this breeze to be blowing less frequently for me today and it might be blowing less frequently for my colleague and many other people living in all parts of the world as country after country (including my own) are lurching and crawling toward authoritarianism.

This reflection on freedom is very timely—for I have just finished editing an issue of *The Future of Professional Psychology* (to be found on this website) that focuses on the Psychology of Political Behavior. I am also in the midst of finishing a book on freedom and collaborating with a colleague on a book that clearly relates to the matter of freedom. This new collaborative venture focuses on the contemporary crisis of expertise and its connection to authoritarianism.

I want to reflect specifically on the breeze of freedom – rather than on the features and forces of freedom as a hurricane that have changed the entire course of history in many parts of the world. I provided a portrait of freedom as a hurricane in a book called *Freedom* that I co-authored with Berne Weiss (Bergquist and Weiss, 1994). We were both either living or working in Eastern Europe during the collapse of the Soviet Union. As the title implies, this book concerned the experience of new-found freedom among the citizens of two countries: Estonia and Hungary.

As a breeze (and not the wind nor a hurricane), the experience of Freedom can be quite gentle. It often is not even detected by me until much later when I am reflecting on decisions I have made or actions I have taken. As a breeze, Freedom is often swirling about. It is coming from changing directions and is neither constant nor predictable. I have written elsewhere about VUCA (volatility, uncertainty, complexity and ambiguity) and have expanded on VUCA (VUCA-Plus) by adding turbulence and contradiction (Bergquist, 2020). Each of these six conditions can contribute to a breezy sense of freedom. By the way, each of these conditions can also contribute to one's attempt to escape from freedom to authoritarianism.

I wish to attend specifically to this breezy change in the direction of freedom. At times the breeze is blowing into my face. At other times, the breeze of freedom is coming from my backside or even from beneath me (swirling upward). Freedom looks and feels quite different when the breeze is coming from these three different directions. I turn to consideration of freedom's breezy experience(s) from each direction.

Breeze At My Back (Tacit Freedom)

In reflecting on how I often experience freedom, I find that it can be blowing gently on my back. This sense of freedom is subtly pushing me forward and upward. Michael Polanyi (2009) the Nobel-prize winning scientist (turned philosopher) might consider this form of freedom to be *Tacitly held*

knowledge, motivation and insight. In a different context, Polanyi (1969) distinguishes between that which we are attending to (what we focus on) and that which we are attending from (the position we are taking when pointing to and focusing on something else). Typically, we are aware of that to which we are attending but are unaware (or at least care little about) that from which we are attending.

For Polanyi, the attending from dimension is critical to our understanding of the true nature of knowledge. Specially, we can never study the source of our attention—for at that point it becomes the focus of our attention. We are now attending from somewhere else and this somewhere else itself can never be objectively studied. In other words, there is ultimately no such thing as objectivity and dispassionate analysis. There is always the passion, bias and purpose to be found in the position from which we are attending. The tidy distinction between science and art is shattered.

I would suggest that I am often attending from freedom when I am making choices, when I am expressing my opinion about something, and when I am seeking fully to understand how another person is seeing and living in the world. Put succinctly, I believe that I am attending from freedom whenever I am seeking to be conscious and intentional in my thinking and decision-making.

Choice and Slow Thinking

When I am making choices about what I believe and how I subsequently act on this belief (e.g. when I purchase something) then I can attend from an assumption of and aspiration regarding being free in arriving at the belief. Behavioral scientists such as Danial Kahneman (2011) speak of the deliberative process that must accompany this reflective process if I am truly to be free. Kahneman describes this as *Slow Thinking*. By contrast, there is something that Kahneman calls *Fast Thinking*. This is the often habitual and bias-laden thinking that takes very little time or energy. It borrows uncritically from the heuristics (quickly accessed human "soft-ware") that dominate our society (such as assumptions about people who possess different skin color or religious beliefs).

Instead of the heuristics being imposed by others who are in authority (have power) I am responsible for ensuring that I don't impose my own heuristics on myself. I can escape from freedom (Fromm, 1941) by either complying with the externally imposed heuristics or quickly and uncritically grabbing on to my own favorite, energy-saving and thought-saving heuristic. It is indeed tempting to stay with the presumptive heuristic. However, at the moment when we resort to this heuristic and to fast thinking, we have forfeited the opportunity to feel the breeze on our back and to elevate our self a bit with the assistance of this breeze of freedom. Csikszentmihalyi (1990) might suggest that moments of breezy freedom elicit the experience of "flow." These are compelling moments when we are being challenged yet not overwhelmed by the setting in which we find ourselves. While freedom is hard to engage, it does come with the potential of finding flow—which, according to Csikszentmihalyi, is hard to beat!

Finding Voice

 Quite a few years ago, Carol Gilligan (1982) and her colleagues at the Stone Center in Wellesley Massachusetts wrote about the developmental challenge associated with finding one's genuine voice—especially as this voice is engaged in connected relationships with other people. While Gilligan is focused particularly on the challenges that women face in finding their voice, I would suggest that this is a

developmental challenge, ultimately, for all of us. For me to be truly free, I must find what it is that I truly believe and that I can articulate clearly and in a compelling fashion to other people – particularly in a manner that furthers trust with other people. It is with the "freedom" of honesty that I can establish a deeply trusting and supportive relationship with another person.

Several of Carol Gilligan's colleagues wrote a book at about the same time that Gilligan was advocating the finding of voice among women. These women (Belenky and others, 1986) offered a powerful account of women who must remain silent because of the constraints placed on them by their society. They asked how these women of silence would come to know anything. Can one engage in the acquisition of knowledge—can one learn—when there is no active verbal engagement with other people? Is a person ever free if they can never speak or engage with other people in knowledge-generating discourse? I would suggest that the answer is "No." Freedom requires engagement and the creation of shared knowledge. We might even consider interactions with other people to be the basis for not only our sense of self, but also our sense of reality (Brothers, 2001).

Empathy and Shared Reality

The engagement with other people also provides us with the opportunity to gain an accurate sense of how they see reality and how the two of us might construct and act upon a shared reality. All of this required what psychologists call a *Theory of Mind*---which is the capacity of human beings as they mature to understand other people by ascribing mental states to them. For most of us, at an early age, we come to acknowledge that the other person with whom we are interacting is engaged themselves in complex thinking and reasoning. They have a mind—just as we do. Most importantly, there are specific feelings that arise from their thinking and reasoning. This, in turn, means that we can empathize with them – for we are aware of our own feelings and often have some idea regarding the source of these feelings (and related thoughts). We are ill-prepared to deal with other people if we don't have a rather elaborate theory of mind regarding these people.

While the development of a theory of mind is usually assumed to be a cognitive task for early childhood, I would propose that this theory often fails us later in life. This theory has to be frequently re-learned and re-engaged as we encounter people who are "different" from us in many ways. It is often hard to create a theory of mind that can be applied to those who are "Others." Freedom requires that we meet this cognitive (and affective) challenge in a successful manner. In the midst of a highly polarized environment and faced with the challenges and pervasive anxiety (angst) associated with VUCA-Plus, it is tempting (even compelling) to disregard the "Other" as a thinking and feeling person. They become a simple political opponent or a menacing enemy that must be defeated at all costs.

Making use of the insights offered by Wilfred Bion (1961) regarding the basic assumptions we hold about other people, the "Other" becomes an adversary that evokes a fight response (if they are not too strong) or a flight response (if they are very strong). We can combine the perspectives of Bion (a psychoanalyst) and the behavioral scientists by suggesting that Bion's basic assumptions are deeply held (often unconscious) heuristics that can uncritically guide our actions and smother any formation of a theory of mind regarding the "Other."

The tacit breeze of Freedom can counter this tacitly held assumption of flight/flight. We can find freedom in seeking to understand what the world might look like from the perspective of someone we fear or hate. Are they just evil (with nothing inside their head and heart other than murderous intent) or is there something there that we might understand and even acknowledge residing in our own head and heart? This engagement of freedom is indeed a challenge!

Facing Into the Breeze (Explicit Freedom)

I find that the breeze of freedom which is swirling around my head and heart is not always subtle. It doesn't always slip behind me and push gently on me—influencing how I think about the world and other people with whom I interact. The breeze at times is blowing directly into my face. It is demanding not only that I attend to it but also that I take some action to counter its force. I must lean forward into the breeze, or it will push me backwards. Freedom does not allow me to stand in place. I either retreat to the past (and authoritarian rule) or I lean (and learn) into the future.

I am attending directly to Freedom. Freedom has become explicit in my life and work. I can see, hear and in some way even taste freedom. I can't ignore it. Furthermore, Freedom is calling on me to take action within the context of opportunities and challenges opened up by the freedom (including the Tacit Freedom that has been influencing my words and relationships). In order to take action, I must find other people of like mind who will join with me in my collaborative leaning and learning into the future. I find these people in many settings—especially in the organizations with which I work and the communities in which I live. Most importantly, sanctuary is fundamental to any setting in which I can act upon the breeze of freedom. I turn first to the nature of sanctuary and then to the engagement of freedom in temporary systems and collateral organizations.

Sanctuaries

Sanctuaries are the places or times or situations (which are created for us, or which we create for ourselves), in which we can drop out of the busy conditions of life for a few moments. Within a setting of freedom, we gather ourselves together, restore our integrity and our energies, and focus again on our highest priorities and deepest yearnings. Sanctuary is where we "come home," where we can love and care for ourselves deeply, and therefore care for others.

Every civilization has had some kind of sanctuary system. In medieval Europe, there were feast days when no one worked and all fighting stopped. This was called "The Peace of God." The church or cathedral was itself a sacred sanctuary. It was forbidden to kill someone who was in a cathedral. In ancient Hawaii, the *heiau* was a place of sanctuary. During a time of war between the tribes, if a man could get to a heiau, he was allowed to stay unharmed for three days. You can still see the heiau called "The City of Refuge" on the Big Island.

The Need for Sanctuary: There is a hunger for sanctuary: a hunger to talk about it, a hunger to know about it, and most of all a hunger to find it. It is almost as if, in our intense search for all the many kinds of well-being, we have nearly lost one of the most precious kinds of well-being of all. We have lost our ability to find sanctuary—real, true, healing, transforming, and deeply comforting sanctuary—in our lives.

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In many ways, sanctuaries are more important today than they were fifty years ago. There is a constant need for sanctuary throughout the history of any society. In most societies at most times, there are a sufficient number of forms and occasions for sanctuary to meet the needs of the society. However, there may be periods of change in which the normal forms of sanctuary are not available, and new ones have not yet been instituted within a society. These are moments when the breeze of freedom is blowing directly into our collective faces. During these periods there will be a felt need for finding new forms, or recovering old forms, of sanctuary. A study of any society may in the future show that there are cycles involving the renewal of old forms of sanctuary and the invention of new forms. There seems to be a great need for sanctuary at times of rapid change, between eras, or in times of turbulence. We certainly seem to be operating in such a world at the present time—given the pervasive presence of VUCA-Plus conditions.

What Sanctuary Does: The need for sanctuary seems to be established deep within our instinctual lives, in our DNA, deep within our bones, as it were. Every life form, including the planet Earth, lives in cycles (sometimes we call them circadian cycles). As the writer of Ecclesiastes noted, and the folk singer sang: **"**For everything there is a season and a time for every matter under heaven; . . . a time to keep silence, and a time to speak; . . . a time for war, and a time for peace. [Ecc.3.1-11]" What then are the appropriate seasons for sanctuary and what functions are served by sanctuary when it is found—and how do sanctuaries align with the opportunities and challenges posed by the breeze of freedom?

First, sanctuary enables us to stop, hide, get away, rest. We all need to stop. We need to stop physically, mentally, emotionally, and perhaps spiritually. Animals seem to spend a lot of time resting. They know how to stop physically. Children do too. So do adults who live near the equator. We northern (or southern) hemisphere adults seem to be the only creatures who have trouble learning to stop and rest. . . at least until we are forced to by illness or age.

Our bodies give us natural times of resting, and these (with a stretch of the imagination) could be called mini-sanctuaries or even nano-sanctuaries. The heart rests between beats, the lungs between breaths. Our days are interwoven with moments of rest, and hopefully reflection. When the day is over, we go into a major physical sanctuary called sleep. What a curse it can be for those with insomnia who cannot sleep! In sleep we not only rest, but some (from ancient sources of wisdom) say we commune with our deeper selves in dreams. Sleep seems to be for more than rest. Coupled with dreaming, sleep provides some kind of psychological adjustment and inner dialogue. Some researchers suggest that without sleep (and dreaming) we perish. (Walker, 2017)

We also need to stop being quite so conscious sometimes. We need mental rest. Some call it "veg'ing out," or "zoning out," or just "checking out." But whatever it is, we are "out." Actually, we alternate between consciousness and unconsciousness most of the time. Consciousness, real consciousness, is a recent and hard-won human achievement. We have only been truly conscious (whatever level of consciousness we have in fact achieved) for a few thousand years (Neumann, 1954). Consciousness was difficult to come by, and to this day it is hard to hold on to, hard to sustain. After only a few moments of genuine awareness, we are often flooded with lack of awareness. We come back to awareness a minute later and wonder "where we went". What spouse hasn't said to the other in a conversation, "Where did you go?"

Sometimes the sanctuary is in a small corner of our house; an alter with a crucifix, or a puja table in India with flowers, incense, and a picture on it, or a prayer window looking out into a garden. Sometimes it is a time and a ritual, like evening prayers for the Jew or one of the five times of prayer for the Muslim. Sometimes it is a practice, like stopping in the park to feed pigeons on the way home from work at the end of the day or having a quiet cup of coffee in the staff room of a busy corporation. Not always, but often enough to keep us engaged, these moments take us to a place we call our true home. We are rested and renewed. We say, "Now I am more myself. again." Sanctuary enables us to stop, hide, get away, rest, and become "more myself again."

Second, sanctuary enables us to heal, repair, re-group, recover. While we are resting our bodies, minds, emotions, and spirits, we often also heal. Hospitals are great public sanctuaries for healing in the Western world. Originally in many parts of the world (including America) hospitals served as refuges for the poor and downtrodden (Bergquist, Guest and Rooney, 2003). Nuns and nurses ministered to the nutritional and spiritual needs of the have-nots, as well as their physical needs. While the mission of most hospitals has changed in recent times, there still are separate rules for hospitals. There are boundaries. There are expected behaviors. There are ranks and protocols. We know when we are in a hospital.

People also come to sanctuary who have been defeated. Perhaps, there is a renewed interest in sanctuary because we are, in some sense, a defeated society. Sanctuary is clearly and historically a place for defeat. That is where you go to lick your wounds to either come out and fight again or adjust to your defeat. As I have noted, the heiau (city of refuge) in Hawaii was established as a place to stop and rest in time of war. The Kings peace in Medieval Europe accomplished the same purpose. The rule against killing within a Cathedral or church (Murder in the Cathedral), or at other holy places reflects the same issue. When a politician is defeated, or a business leader is fired, they go to a sanctuary to pull their life together again. While the defeat or firing provides an opportunity for grieving and regret, it also can be a place for renewal and re-invention-- accompanied by the strong breeze of freedom.

Third, sanctuary enables us to find our deep center and reorient to our own deeper compass again. At the heart of sanctuary for many people is the sense of a place, time or situation where the conditions of ordinary living are suspended for a time. This makes sanctuary different from all other parts of life in time, space, and situation. In these suspended moments, the demands of ordinary life are set aside as are the rules of ordinary life. The heavy weight of blame, guilt, danger, limitations, and sanctions is lifted. Several uplifting forces are added, including (certain kinds of) freedom, openness, possibility, empowerment.

In sanctuary there is the real possibility for renewal and healing at a deep level: nurturance, body, mind, interpersonal, spiritual, situational. There is a real possibility for introspection: seeing oneself as one is (introspection); seeing a situation as it is (extrospection); seeing others as they are, and so forth. There is a real possibility for creative new thinking, being open to new possibilities, being able to envision oneself in new possibilities. There is a possibility of some kind of coming home to one's own truth. There can be a kind of coming to oneself. The breeze of Freedom is blowing.

Finally, sanctuary enables us to grow by engaging and encountering something inner or other, and then return. There is a close relationship between sanctuary and learning. We have identified sanctuary as refuge, yet sanctuary can also mean challenge and learning. Learning occurs both within the context of what is to be learned, and apart from it. One has to have direct experience, but also reflection from a place of disengagement. The place of disengagement is a temporary sanctuary.

There is a critical point to be mentioned here regarding the role of learning in a sanctuary setting. Significant learning involves a balance between support and challenge. Challenge occurs in the process of engagement—and particularly the engagement of ironic challenges. Support often means the provision of physical, emotional, social, or intellectual resources. Challenge is added in small manageable increments at a speed with which the learner is able to cope. The learning environment can be engaged in a full-blown sanctuary, or it can be created in a mini-sanctuary in which the full demands of the new learning are not yet applied. Most importantly, it is a place where failure can occur. Sanctuary provides safety. It allows the breath of Freedom to enter.

Publicly identified sanctuaries—places and times labeled as sanctuaries—provide the circumstances in which certain kinds of deeper learning, healing, integrating, meaning-making, and self-communication can take place. One could argue that all learning takes places in some sort of sanctuary-based setting, and that the most important integrative and developmental learning we do as adults occurs both in embedded settings (in the world) and sanctuary settings (away from the world).

The Nature of Sanctuaries: Sanctuaries are as old as the human race. Humans, and even animals before them, seem to have always had sanctuaries of one kind of another. At least within a single animal family or species, there are time and places, seasons and locations, when animals of the same species will not hunt or kill each other. Primitive humans have always had their holy spots, their stone enclosures, their sacred trees, within the bounds of which you were safe, no one could harm you, and to which you also went for healing.

Long before the great European cathedrals were built, there were sacred spaces. There were times and seasons when warfare stopped, and healing could occur. Similarly, there were days ("the feast of fools") when traditional hierarchies were turned on their head and alternative roles could be explored (not unlike our emerging use of Halloween as a day of pretend and altered roles for adults in many contemporary organizations) (Cox, 1969).

A sanctuary is three things: a place, a time, and a state of mind. A sanctuary is a place of safety or healing or transformation, usually a holy place. Sanctuary is a time when warfare or strife stops, a time when enmity can cease and reconciliation ensue, at least for the moment, and a time for reflection. Sanctuary is a state of mind, in an individual, a group, or a culture. It is a moment of rest, a moment when healing can occur, when we can stop long enough to get our bearings again, to find our center, and to set our course anew. It is an important moment, for an individual or for a society, in this mid-21st Century world when the breeze of freedom might be blowing into our individual and collective face. Where do we go when we are challenged by this breeze. Do we seek out false sanctuaries—such as are found in the use of mind-altering drugs, obsessive shopping for un-needed goods, or binge watching and mindless channel surfing? Do we just suffer and remain frozen in a state of inaction and despair? Do we

find sanctuary—and then come out renewed and with new insights to benefit from this breeze of freedom?

It should also be noted that all Wisdom Traditions insist on sanctuary. A wisely lived and productive life is impossible without sanctuary. On the other hand, the wise heart knows the need for time and solitude and reflection, as a wise gardener knows the need for seasons and care if plants are to grow and flourish, to give nourishment and beauty. Every Wisdom Tradition calls for both time alone and time engaged in community or society or "the marketplace," alternating the two throughout the days and through a life. Only time alone can provide a deep and intimate relationship with the Self and all that is. Only time in community can hone Self to a mature level of application and service. Only alone can you hear yourself. Only in community can you hear others. The two are actually one.

Joseph Campbell brought this vision to our world during the 1980s with his books (and TV show) on myth (Campbell,1991). The hero typically starts at home, then goes out to be alone in the wilderness (including into sanctuary), faces himself, and then comes back richer. He then shares his riches with the community. Without going out (or inward) there are no riches. Without coming back, there is no value. We leave shallow and disoriented, we come back deeper and oriented to our own true North Star. A mature life (and a mature society) needs both. Freedom enables us to journey, learn, and return home so that we might share what we have learned with others.

Temporary Systems

When and where do we need sanctuary and how do we create sanctuary in an organizational setting? What do we do with the breeze of freedom that is blowing in our collective faces? How do we create sanctuaries when we wish to stop, hide, get away or rest (the first purpose)? What about the second function of sanctuary (to heal, repair, re-group and recover)? How and where do we retreat for a minute or two from a daunting challenge and come back to this challenge with renewed energy and new insights? The third purpose of sanctuary— "to find our deep center and reorient to our deeper compass again"—is often controversial. It requires our delving into deeper, more personal, and often more spiritual issues. Certainly, the notion of "coming home to one's own truth" is foundational to any moment of freedom: "You will know the truth and the truth will set you free." The fourth purpose, which concerns the interplay between sanctuary and learning, is clearly relevant to freedom. "Mini-sanctuary"—moments of flow—can be found (and created) where learning is enhanced and further refined, as well as when actions that are based on this learning can be identified, described, and analyzed (what is often called "meta-learning").

This is all well and good. But what about options other than sanctuaries? How else can these outcomes be achieved? In addition to sanctuaries, can we find other ways to encounter freedom in a successful manner? How do we take action (individually and collectively) when the breeze is blowing directly into our face—and we are encouraged to take action on behalf of this breeze. I proposed that in many instances, we can create successful setting for freedom in organizational and community settings by establishing temporary systems.

Sanctuaries clearly are temporary systems; however, these systems are to be found in many other settings. As Matthew Miles (1964) noted many years ago, temporary systems are to be found throughout our society. Examples of temporary organizational systems that Miles offered at the personal level include psychotherapy, confessional sessions and personal growth programs as temporary systems. At a collective level, temporary systems include carnivals, theater, celebrations, games, retreats, workshops, conferences, task forces, project teams, coffee breaks, and office parties. How do we create these systems in the organizations in which we work and communities where we live? How do we replicate systems that are comparable to the sanctuaries I have described?

Temporary systems can take on many different forms. Some provide short-term, ad hoc settings in which new methods or products are tested out as a "wind tunnel" for new ideas. Others provide regularly convened alternative structures, in which all or many members of an organization can identify and solve problems, communication, and manage conflicts in ways that are not usually employed in daily work life. I will turn to these "collateral organizations" shortly. Some temporary systems enable employees to try out a new skill without fear of failure (a "dress rehearsal"). Other temporary systems enable employees to get a taste of the end point to which they are striving. Regardless of the forum which these systems take, they provide a way in which to face the breeze of freedom and avail ourselves of its benefits.

There is a key insight to be offered at this point. We are most likely to be aligned with and benefit from the breeze of freedom when challenge and support are balanced. As Nevitt Sanford (1966) suggested many years ago, we learn and thrive in temporary systems that allow not only for the presence of difficult problems but also for resources that are adequate to revolve these problems. According to Csikszentmihalyi (1990) work and life in an organization or community can often be either quite boring or profoundly anxiety- provoking. It is in the threshold between boredom and anxiety that we find rich occasions for personal and collective learning. It is in this threshold that we are most able to benefit from the breeze of freedom.

On behalf of freedom, we can influence the directions and culture of our organizations and communities when we help create conditions that are both challenging and supportive. Our attempts to encourage change (which inevitably increases challenge) must be matched with a comparable concern for support and nurturance. We are looking for temporary systems when and where this balance is achieved. Stated in more metaphoric terms, we must find a chalice and a blade when creating a temporary setting. As Rianne Eisler (1987) has suggested, we mold a chalice to contain the anxiety and direct the energy (Sanford's support), while also wielding the sword of change and transformation (Sanford's challenge). The sword helps to mobilize creativity and energy in the first place while the chalice makes it safe for this mobilization to occur. The chalice and blade allow us to learn and flourish in the face of freedom.

Collateral Organizations

I propose that Eisler's chalice and sword are not just metaphoric images borrowed from a world that might once have existed in some nonhierarchical communities—as documented not only be Eisler but also (more recently) by Graeber and Wengrow (2021). The chalice and sword can be found in certain contemporary systems. These systems are called Collateral Organizations.

Here is the challenge that is being addressed in the engagement of collateral organizations. It seems that managerial flexibility is not always present (or even needed) in contemporary organizations. On behalf of stability and predictability (in the midst of a VUCA-Plus world), most organizations (and their managers), stick with rigid structures, processes and attitudes with regard to the way in which they operate. Freedom is sacrificed on the altar of accountability and consistency. We need to know where we are headed—even if the road ahead is not very clear and the landscape could be rugged and dancing (Miller and Page, 2007).

It is important to note that this sacrifice of freedom is not always warranted. When the road ahead is unclear and dancing, we may need a big dose of flexibility. Freedom is not to be sacrificed. Rather, freedom is to be found and protected in many contemporary organizational and community settings. Solutions to different problems call for different modes of operating. Sanctuaries are to be found or created that are amenable to new ways of thinking. Temporary systems are to be formed that allow from risk taking and experimentation. All of this culminates in the creation of a system in which flexibility is the coin of the realm. Specifically, flexibility and freedom are to be found in something called a Collateral Organization. This is a parallel organizational structure, process (and even attitude) that operates in a different manner from the usual, daily structure, processes and attitudes of the organization.

Purposes: Collateral organizations are used to achieve two primary goals. First, they provide an opportunity for members of an organization to think "outside the box" and lean/learn into the future with the breeze of freedom blowing both from their back and in their face. Second, collateral organizations help those involved to identify and either resolve or manage challenging problems (of a VUCA-Plus nature) that have not been addressed in a satisfactory manner via the "regular" way in which the organization operates. A new organization doesn't have to be created, nor do new people have to be brought into the organization. Only the breeze of freedom is required when establishing a collateral organization.

The leaders of contemporary organizations often create task forces, project teams, ad hoc committees, quality circles and pilot projects as a way of getting around seemingly intractable problems. They might even transform their organization by imposing a matrix design so that multiple perspective can be brought to a set of recurring problems. These initiatives are often quite valuable in helping to open the doors and windows of the organization so that some freedom can blow in. However, they don't meet all of the needs that can be served by a collateral design. They simply do not provide enough freedom nor encourage the kind of creative, multi-perspective work that is being engaged in a temporary setting (such as a collateral organization) that is set up with different norms, ways of interpersonal engagement, and even assignment of leadership and facilitation functions.

Unique Features: The collateral organization is unique in that it usually is not populated just with experts who purportedly are best able to address a specific problem; rather, the collateral organization typically involves a whole host of people (often the entire organization). It seems that the intractable problem often is intractable precisely because it is not clear who the experts really are with regard to this specific problem.

To make sense of this rather bold statement regarding expertise, it is important at this point to distinguish between problems and puzzles that are to be found in all systems (Bergquist and Mura, 2011). Unlike organizational puzzles that have clearly defined parameters and solutions that are readily accessible to the "right" people with expertise in a specific area, organizational problems (and even more challenging organizational dilemmas and polarities) are multi-tiered and often operate in what Miller and Page (2007) call a rugged and dancing landscape. All hands must be on deck when an organization or community faces such a challenge. Who knows where the answer can be found. What we do know is that an adequate answer is more likely to be found when the breeze of freedom is swirling around those participating in a collateral organization.

Establishing: The following steps are typically taken in forming a collateral organization. Leaders of an organization or community must first acknowledge that the usual way of doing things is not necessarily of greatest value when applied to certain types of institutional challenges. It is important to emphasize that this doesn't mean that the organization or community will abandon its regular way of operating (to be replaced by the new collateral organization): "we will still hold on to our tried-and-true, proven way of being as an organization. But we will be adding something." We can hold on to the old while embracing the new. This is the magic of collateral designs.

Second, a set of values and a compelling vision must be articulated concerning what the collateral organization must do if it is to be successful. As I have already mentioned, a collateral organization should not be focused on a specific problem. Rather it should provide a new approach to the identification and management or resolution of a cluster of interrelated problems that have eluded successful management or resolution via the standard mode of operation in this organization. Collateral organizations are intended to address what Miller and Page (xxxx) call complex issues. While complicated issues involved many parts, complex issues involve many parts that are intricately interwoven. Intractability usually concerns complexity rather than complication and is often best addressed through the use of a collateral system that operates in a new way that introduces unique perspectives and practices.

The third and fourth steps will vary quite a bit depending on the nature and purpose of the collateral organization. The third step concerns specification of measurable objectives, along with specification of assigned tasks. This step might be inappropriate if the collateral organization is intended as an "open space" for consideration of multiple problems as they emerge. An open space is particularly appropriate if this collateral organization is to be a safe place where a whole host of lingering problems can be identified and discussed. The fourth step concerns the people who will be invited to participate in this collateral organization. At one extreme we find the collateral organization that is set up specifically for members of the C-Suite or perhaps from those from the C-Suite together with members of the governing board. At the other end is the collateral organization that is open to all members of the organization or community (and perhaps even stakeholders both inside and outside the organization or community).

The final (and perhaps most important) step is establishing the ground rules (norms) for operation of the Collateral organization. How are people in this organization expected to treat one another? What is the nature of leadership and facilitation for this organization? It is also critical to establish the boundaries

between this collateral system and the standard, daily operating system of the organization. There are also important boundaries to be established regarding what can be shared outside the collateral organization (norms addressing confidentiality) and how insights and recommendations coming out of the collateral organization will be shared (if at all) with specific stakeholders (norms addressing the relative transparency of the collateral organization).

Variety: collateral organizations can last for quite differing lengths of time and be held in diverse settings. They might be one to two hour "huddles" that are held at the worksite. They begin or end each workday or bring a week of work to an end on Friday afternoon. The huddle can provide an opportunity for a candid review of services provided to patients in a dental office or plans for the next week of menus in a restaurant. Facilitation of the huddle can rotate among all employees (serving as an informal leadership development initiative). The collateral organization is more likely to last a day or two and be held away from the worksite (often in a retreat setting). On occasion, the collateral organization lasts for a week or longer. However, this rarely is done and is not recommended—for it is hard to sustain a distinctive way of operating for a lengthy period of time. The long-lasting collateral organization begins to either resemble the standard way of operating or take on its own rigidity of structure, process or culture.

Facilitation: Standard group management tools can be deployed in facilitating the operations of a collateral organization. These tools include those that encourage "out-of=the-box" thinking (so-called "divergent" methods)—such as brainstorming. They also include "convergent" tools that move a group toward consensus—such as the Delphi technique that provides progressive focusing of group members (through successively collated judgements by group members regarding a specific issue). Other traditional facilitation tools include the setting of ground rules, delegating roles, providing breaks, and taking notes (usually on a flipchart or through use of power point). Most importantly, group facilitation should include periodic review of ongoing group processes and meta-planning (finding ways to collect ideas for upcoming meetings that enable thoughtful consideration of each member's ideas).

Even more powerfully structured modes of facilitation might be engaged to ensure that the collateral organization can operate in a truly unique manner. The talking stick (which was an aboriginal tool of democracy) might be used to ensure that everyone in the organization has an opportunity to be heard. Each person who has just spoken is "free" to hand the talking stick to anyone whom they invite to share their own perspective and contribute their own ideas. Variants on the talking stick include simply going "around the circle" with each group member providing their idea regarding a specific issue. This circle technique can be made more interesting if each member has to contribute a new idea that has not been previously mentioned. Several rounds will often produce very interesting results. This "divergent" technique is often preferable to brainstorming in that it ensures that creative thinking is not dominated by one or two group members.

An even more demanding tool can be engaged. This is a divergent process like brainstorming and the group circle process I have just described. Originally engaged by George Prince, this process (called spectrum analysis) is particularly well aligned with the purpose of collateral design. Through his organization called "Synectics", Prince offered a spectrum perspective that might today be called "appreciative." It is assumed in a spectrum analysis that there is at least the seed of a good idea

embedded in everything that is suggested. All ideas can be placed somewhere on a line (spectrum) from great to poor—it is not either/or. This being the case, every person who speaks up must first indicate three reasons why the idea offered by the previous speaker can be viewed as a positive contribution. Frequently, when this restriction is imposed, the collateral participants end up building on each other's ideas rather than offering opposing suggestions.   If a diverse population of participants is invited to this collateral setting, the spectrum analysis is likely to yield particularly interesting, innovative and even "breath-through" outcomes.

We can offer yet another example of how a collateral organization might look quite different from a traditionally operating organization. In this case, the facilitation addresses the differing perspectives held by subgroups in the collateral organization. Originally used as a conflict-management tool, an intergroup perception process requires that a specific subgroup (I will call it "A") produce a list of its own distinctive characteristics, a list of what it believes are the distinctive characteristics of the other subgroup(s) is (are) (Group B, C etc.) and a list of what it predicts the other subgroup(s) are likely to include on their list of Group A's characteristics. The same assignment is given to each of the other subgroups. These lists are shared and discussed. In many ways, this process builds on the theory of mind I identified earlier in this essay. A much richer (and more accurate and constructive) theory of mind can be built collectively though the use of this process—especially if it is engaged early in the life of a collateral organization. This tool is of particular value when the collateral organization is composed of participants from different "camps" and polarizations.

Future Search: There are a wide variety of more comprehensive models regarding the design of a collateral organization. One of the most notable of these models is called "Future Search." Originally developed by Marvin Weisbord, a noted organization consultant, Future Search is a planning meeting procedure that is task focused. It builds on the basic principle that the meeting (collateral organization) should bring in a large number of people (as many as 100) from diverse backgrounds. In this way, the "whole system" is represented when a specific problem is being addressed.

Typically held over several days, Future Search begins with creating a picture of the past (often graphically portrayed on a long sheet of butcher paper). As is the case with most of the Future Search activities, small group discussions are held first. Report outs from these groups to the whole group follow (thus ensuring the initial contributions of all participants in the small groups). Bringing the focus to present time issues, a "mind map" is often produced (once again often making use of graphic portrayals on a large sheet of paper). Butcher paper often "reigns supreme" at a Future Search meeting.

The mind map includes not just current issues, but also anticipated trends as viewed from the diverse perspectives offered by Future Search participants. Given these varying views of the future, participants break again into small groups to imagine themselves in the near (and more distant) future. What would their life and work be like in a very positive future—and how would they get to this future? Consensus is reached in the small groups and their findings are reported out to the entire group. The primary task of the Future Search group is now to find "common ground" and to build an action plan that enables participants to take steps required (or at least identified)as a way to reach a shared positive future. Connections have been created during the Future Search process that make possible the ongoing collaboration among participants in working toward realization of the steps envisioned during the

Future Search meeting. Follow-up activities and "check-ins" are identified, and the Future Search meeting is concluded.

Several features of a collateral organization are deeply embedded in the Future Search process. These include new ways in which members of this organization interact with one another and in which planning is being engaged. Future Search also incorporates new ways in which leadership is being exhibited. Furthermore, Future Search encourages an appreciative perspective regarding contributions that can be made by each participant. Perhaps of greatest importance is the "whole system" perspective adopted by Future Search. This perspective contrasts with the isolated, silo-based perspective to be found in most regular organizational operations. This "whole system" perspective of Future Search interweaves with a focus on the future (as the tile of this method implies)—yielding an even more distinctive way of operating as a temporary collateral organization.

 Open Space: A quite different model of collateral organization design is to be found in the more recent enactment of a comprehensive design called Open Space. Originally offered by Harrison Owens (yet another noted organizational consultant), Open Space provides a much less structured process than is the case with Future Search for addressing the diverse issues facing a specific organization or community. Like Future Search, Open Space is a method for organizing and running a meeting or multi-day conference where participants have been invited to focus on a specific, important task or purpose. Unlike Future Search, Open Space is participant-driven and less organizer-driven.

Pre-planning remains essential in preparing for an Open Space meeting. However, less pre-planning is needed than when Future Search is being engaged. The lack of substantial pre-planning is in keeping with an emerging perspective in the sciences regarding complex and chaotic systems that are "self-organizing." As we now know is the case with many living systems, few hierarchical controls are present in the operation of Open Space. This type of collateral system is to some degree "self-organizing." As noted, Open Space participants "drive" the agenda through the decisions they make throughout the meeting regarding the topics to be addressed and the extent to which any one topic sustains their attention.

Given the self-organizing nature of "open space" meetings, it is important that some "container" (Eisler's chalice) be present throughout the meeting. This Open Space container is a set of assumptions that provide a foundation for this distinctive collateral organization. I like to think of these assumptions as representing (and enforcing) the "spirit" of Open Space. Following is a typical set of Open Space assumptions:

> Whoever comes to this Open Space event is the right person (an appreciative perspective)

> The topics being addressed are those that are most important, and those about which participants have a passion.

> Whenever a particular topic emerges, it is the right time

> When the dialogue regarding a topic is over, it's over

> Whatever happens is the only thing that could have happened

There is one Law: the "Law of Two Feet: Shoes are made for walking" (participants should feel free to move to another group and another topic)

With these assumptions in place, the Open Space facilitator or facilitation team become much less visible as the Open Space process begins. It is important to note that Open Space facilitators do play a role, but it is one that does not drive the agenda. Along with the guiding assumptions, the facilitators are providing the informal container for this collateral organization. They are "holding a space" for participants to self-organize. The facilitators are definitely not micro-managing either activities or conversations; however, they are attending carefully to ongoing interactions among Open Space participants and will gently intervene if the informal leader of a small group gets heavy handed or if there is any kind of pressure for participants to join (or leave) a particular group.

Unlike what we find in Future Search, the agenda and anticipated outcomes of an Open Space meeting can't be fully specified prior to the formation of this collateral organization—precisely because of the self-organizing and evolving nature of any specific Open Space meeting. That is why I previously mentioned that any requirement is controversial if a collateral organization is to specify desired outcomes or leadership roles ahead of time. Open Space meetings operate as a dynamic, complex (and often chaotic) living entity. We can't anticipate what exactly is going to happen or which issues are to emerge and be addressed by Open Search participants. As noted in the basic assumptions I offered, there is an abiding belief that the right topics with emerge and will be handled by the right people.

One other important distinctive needs to be drawn. As in the case of Future Search, Open Space meetings don't need the experts. However, it is not about numbers or the diversity of Open Space participants. It is about the assumption that the right people are there. These people just need to be agile of thought as well as steadfast in their commitment to furthering the welfare of the organization or community they represent. While those initiating Open Space meetings might not be considering task-based outcomes, there are several process-based outcomes that are meaningful and ultimately critical to the success of an Open Search meeting. These outcomes have to do with safety, trust, courtesy—and appreciation. The assumptions identified at the start of the meeting and reinforced by Open Space facilitators throughout the meeting ensure or at least create conditions for realization of these process-oriented outcomes.

As in the case of most collateral organizations, Open Space meetings are usually convened for several hours or for a few days. As in the case of Future Search, much of the work in Open Space is done in small groups—with occasional report outs to the entire group. Unlike in Future Search, the small group discussions are often quite fluid in an Open Space meeting. Participants easily leave one group and join another—or start a new group that will address a new topic or engage an existing topic in a new way. Butcher paper and flip charts once again "rule the day." Updates of small group topics and initial points of inquiry related to these topics are posted on these charts along with the place and time where and when this group will be convened.

I find that there are two critical structural components of Open Space that should not be overlooked. First, someone in each small group should be designated as the recorder to take notes (often writing them on a flip chart). Second, at the end of each or at least most open space sessions, a summary document should be compiled from the notes taken by the recorder in each of the small group. This summary is distributed as a paper or electronic document to all participants. The distributed documents

are used as the basis for prioritizing issues, identifying next steps, and continuing work beyond the meeting itself.

This critical component, in turn, points to one other structure that is introduced at the end of the Open Space meeting: all or most of the small groups report to the whole group on follow-up activities. If one of the assumptions I listed above is accurate—that passion is inherent in the topics being addressed-- then this passion (shared by Open Space participants) should extend beyond the Open Space meeting. The passion should motivate continuing attention to the issues being identified and addressed at the Open Space meeting. Without extensive formal monitoring, follow up activities should "self-organize" and important actions should emerge from this collateral organization.

Along with other collateral organizations, the Open Space format can produce startling results and yield needed reform in the way that intractable problems are being viewed and either managed or resolved. The fresh breeze of freely generated ideas, perspectives and practices just might circulate around an existing organization or community following a Future Search or Open Space meeting. This fresh breeze might be welcomed as it swirls around the heads and hearts of those living and working in the organization or community. It should also be noted, however, that heads and hearts might be troubled by this breeze. Members of the organization or community might remain intransigent and resentful of the "non-realistic" outcomes of this "chaotic" and wasteful collateral meeting. Thus, the new viewpoint might be both welcomed and rejected.

We have indeed found that participants in many collateral organizations face ambivalent attitudes when they return to their home organization or community. Nevertheless, long after the Open Space (or Future Search) meeting concludes, its participants (and those affiliated with the participants) might find that the breeze of freedom continues to blow in their face or gentle blow against their back. They are prepared for the ambivalence and are likely to be persistent in their attempts to bring about reform in their organization or community. Unlike those who gather ideas from the passive attendance at a traditional conference or training program, the participants in collateral organizations are actively involved in the creation of the new ideas and are engaged in co-active learning with other participants. They are likely to ensure that the breeze of Freedom continues to circulate in their organization or community. However, is this enough?

Breeze From Under Me That Lifts Me Up

There is a poignant love song written about the "wind beneath my wings." The lyrics to this song speak of the often-unacknowledged support that other people in our life provides. This is support that helps lift us up toward some life achievement. The wind is there even when we falter and lose hope. It is there when we need to learn new and perhaps painful lessons about our own competencies and realities of the world in which we are operating—especially the realities of VUCA-Plus.

I would suggest that the breeze of Freedom can lift us up—just as the wind of support can help us sustain our journey toward personal achievement. The breeze can help us achieve something that was once thought to be unattainable. We can help manage or solve intractable problems. Our work can become innovative--even ground-breaking. At the very least, this breeze can nudge us to operate a bit

outside our usual comfort zone and assume a new repertoire of actions. Yet, the question I have just posed lingers: is the breeze of Freedom really enough?

I would suggest that there is much more to this story about a lifting breeze (or perhaps even wind beneath our wings). We must acknowledge that the wind beneath our wings is needed because we are facing major challenges in our life and work. Without this additional support, we are just flapping our wings and going nowhere (or are falling to the ground). Something more is also needed with regard to Freedom. I propose that the breeze of freedom must be accompanied by the breeze of courage. It also must be accompanied by the persistent breeze of commitment. I believe that my colleague who has left China was assisted by her own courage in leaving family and work in China to find freedom in a new land. She was assisted as well by her commitment to conduct her professional practices without governmental restrictions.

The internally-generate breeze of courage and breeze of commitment are needed if we are to sustain a course of action that comes with many barriers (both from inside our self and from outside our self). The barriers were numerous for my colleague from China. They are numerous for all of us living in mid-21st Century societies. It is not easy to avail ourselves of freedom's opportunity to think slowly and make thoughtful choices. It is often a struggle to find and engage our true and authentic voice. We find it difficult to empathize with other people—especially when they live on the other side of a polarized community. And we confront a host of barriers when trying to establish and maintain sanctuaries, temporary systems and collateral organizations. It is not easy to find safety alongside freedom in mid-21st Century life.

Personal courage and commitment are required. Yet, they are not easier achieved or maintained. The question thus becomes: how do we find courage and how do we embrace commitment in a persistent manner? This is much too big a question to be addressed fully in this essay. I am focusing on freedom—which is certainly a big enough topic for any one essay (even an entire book). However, I would suggest that personal courage and commitment arrive in part from what we inherit. We can look back in time at what our ancestors have taught us. These ancestors can be related to us, or they can be noted figures in history. I can point to the recent book written by Jon Meacham (2022), an esteemed American historian. He considers what we might learn from Abraham Lincoln if he were alive today. The lessons to be learned are relevant since Lincoln also lived and led in a time of major polarization.

I would point to another United States president, James Garfield. He is less well-known (or revered) than Lincoln; however, he is one of my distant relatives. I might, therefore, be amenable in particular to lessons provided by Garfield based on the words he spoke and actions he took. Addressing many of the same societal issues as Lincoln, Garfield found a way to be free in what he said and did—in spite of the negative consequences that his words and deeds might yield. Garfield found courage and sustained commitment in the actions he took.

Here is an accounting of these actions by Heather Cox Richardson (2021) (another historian of the American past):

On this day [August 6] in 1880, the Republican candidate for president, James A. Garfield, spoke to thousands of supporters from the balcony of the Republican headquarters in New York City. Ten years before, in 1870, Americans had added the Fifteenth Amendment to the Constitution, making sure that Black men could vote by guaranteeing that "the right of citizens of the United States to vote shall not be denied or abridged by the United States or by any State on account of race, color, or previous condition of servitude."

As soon as the amendment was ratified, though, white southerners who were dead set against their Black neighbors participating in their government began to say that they had no problem with Black men voting on racial grounds. Their objection to Black voting, they claimed, was that poor, uneducated Black men just out of enslavement were voting for lawmakers who promised them public services, like roads and schools, that could be paid for only with taxes levied on people with the means to pay, which in the post-Civil War South usually meant white men.

Complaining that Black voters were socialists-they actually used that term in 1871-white southerners began to keep Black voters from the polls. In 1878, Democrats captured both the House and the Senate, and former Confederates took control of key congressional committees. From there, in the summer of 1879, they threatened to shut down the federal government altogether unless the president, Republican Rutherford B. Hayes, agreed to end the federal protection of Black Americans in the South.

The congressional leader who eventually forced them to back down was James A. Garfield (R-OH). Impressed by his successful effort to save the country, in 1880, party leaders nominated him for president.

Garfield was a brilliant and well-educated man and had served in the Civil War himself. On August 6 in New York City, he singled out the veterans in the crowd to explain how he saw the nation's future.

"Gentlemen," he said, "ideas outlive men; ideas outlive all earthly things. You who fought in the war for the Union fought for immortal ideas, and by their might you crowned the war with victory. But victory was worth nothing except for the truths that were under it, in it, and above it. We meet tonight as comrades to stand guard around the sacred truths for which we fought."

"[W]e will remember our allies who fought with us," he told them. "Soon after the great struggle began, we looked beyond the army of white rebels, and saw 4,000,000 of [B]lack people condemned to toil as slaves for our enemies; and we found that the hearts of these 4,000,000 were God-inspired with the spirit of liberty, and that they were all our friends." As the audience cheered, he continued: "We have seen white men betray the flag and fight to kill the Union; but in all that long, dreary war we never saw a traitor in a black skin." To great applause, he vowed, "[W]e will stand by these [B]lack allies. We will stand by them until the sun of liberty, fixed in the firmament of our Constitution, shall shine with equal ray upon every man, [B]lack or white, throughout the Union." As the audience cheered, he continued: "Fellow- citizens, fellow-soldiers, in this there is the beneficence of eternal justice, and by it we will stand forever."

Garfield won the presidency that year, but just barely. The South went solidly Democratic, and in the years to come, white northerners looked the other way as white southerners kept Black men from voting, first with terrorism and then with state election laws using grandfather clauses that cut out Black men without mentioning race by permitting a man to vote if his grandfather had voted, literacy tests in which white registrars got to decide who passed, poll taxes that were enforced arbitrarily, and so on. States also cut up districts unevenly to favor the Democrats, who ran an all-white, segregationist party. In 1880, the South became solidly Democratic, and with white men keeping Black people from the polls, it would remain so until 1964.

What might I learn from James Garfield, my esteemed ancestor? At a moment of potential freedom—when he was speaking before a crowd in New York City—what did James Garfield say that was risky (even life-threatening)? Garfield spoke of liberty, valor, traitorous behavior—and most importantly the valuable service provided by African American soldiers on behalf of the American Union. These were not safe words for Garfield to pronounce in a world that was saturated with fear, rage and prejudice.

Specifically, James Garfield has taught me that the breeze of courage comes in part from a long-term perspective. We act courageously on behalf of a future possibility rather than just the stark present reality. This might be one of the ingredients in Future Search conferences that enables participants to act courageously after the conference comes to an end. I have also learned about a commitment to the "sacred" truth and an open assessment of reality. As Garfield notes, victory is only worth something if it is founded in truth. This is a particularly relevant lesson for all of us to learn in our polarized mid-21st Century American culture. The sources of tacit freedom (breeze at my back) that I have already identified seem to be directly aligned with what Garfield said during his New York City speech.

Finally, I am touched by what James Garfield said about his abiding commitment to the welfare of Black Americans. In keeping with an expanding theory of mind, Garfield acknowledges that the "spirit of liberty" to be found among Americans with dark skins. Like many of us with lighter skins, these valiant Black men fought for the American constitution and preservation of the American Union. The Black man was embraced by James Garfield as not only a wartime ally but also a friend. For Garfield this is a commitment that was sustained. He continued to act on all of his beliefs in a consistent and persistent manner. There is much to learn about freedom from what James Garfield freely chose to believe and the values he freely chose to embrace and upon which he acted in a position of leadership.

Thank you, James Garfield, my cherished relative, for teaching me about these important matters. I would hope that I might be as courageous and committed as you. The breeze of freedom must be complemented, as you have taught me, by an equally enduring breeze of courage and commitment.

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