

“In the confusion, anxiety and emotions that permeate the dynamic of helping others and facilitating change, the process ultimately begins and ends with our internal landscape of characteristics, values, beliefs, and assumptions. In short, the structures that makes up our consciousness and ‘self.’”

Managing Use of Self for Masterful Professional Practice

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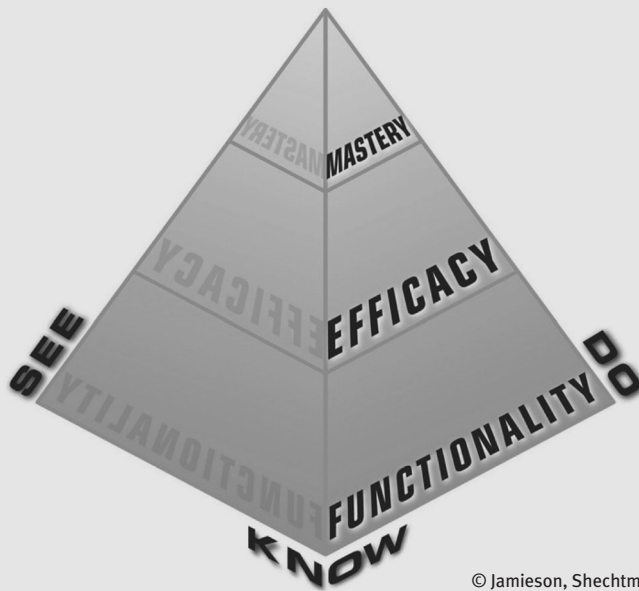
Throughout the development of the OD field “use of self” or “self as instrument” has always been talked about or taught as important for the role of the change agent. Emphases ranged from self-awareness and personal growth to developing better skills in aspects of consulting. Interpretations spanned simply knowing more about your “self” to deeper recognitions of consciousness, choice, shadows, agency, behavior patterns, developmental theories, and intentionality. The National Training Laboratory’s T-group movement during the 1950s and 1960s brought considerable attention to self-awareness, feedback, and interpersonal and group dynamics, helping to solidify use of self in understanding one’s behavior and impact. While many education programs have pursued the theme or actual course work, our conceptual grounding and literature on this topic has remained sparse. Consequently, the idea of use of self has often been ambiguous, vague, and difficult to convert into action; and has mostly been a mentored skill or shared tips and techniques to aid understanding and behavior.

Concurrently, other professional helping disciplines have also pursued the same central concept and have created their own literatures. Perhaps the introduction of the term “use of self” came from Frederick Alexander who developed The Alexander Technique in the 1890s which ultimately enjoyed an expansive adoption across numerous disciplines. His work was focused on the integration of the mind/body system and the relationships among psychological and physical functioning and

the role of consciousness (Alexander, 1932). The professional or therapeutic use of self has also been discussed over many years in the education of counselors, psychotherapists, nurses, clinical social workers, occupational therapists, and teachers (e.g., Miller, 1962; Baldwin, 2000; Chitty, 1993; Rogers, 1961). As early OD pioneers came from many of these same disciplines, it is easy to understand how the concept could have entered OD.

The topic of use of self is critical in the daily interactions of any helping professional role and especially impactful in change since the responsibilities, ethics, and outcomes affect other’s lives. Situations involving use of self are continuous in our lives as helping professionals. The greater our awareness of these situations, the better chance we have to effectively manage ourselves for the benefit of our clients or others. To the extent we are unaware when these situations occur, they go unmanaged and may potentially be unhelpful or do harm. We must see beyond our tools and techniques, as many times the only instrument we have is ourselves as we engage with our clients in dealing with their situations. Our ability to see a client’s situation as bias-free as possible, interpret it, and act on it may be the most foundational concept for OD practice. In the confusion, anxiety and emotions that permeate the dynamic of helping others and facilitating change, the process ultimately begins and ends with our internal landscape of characteristics, values, beliefs, and assumptions. In short, the structures that makes up our consciousness and

Figure 1: Managing Use of Self Framework



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“self.” Fundamentally, as we are the users of theory, processes, and concepts, they are only as useful as our ability to understand and use them helpfully and appropriately.

Effective use of self includes not only our self awareness, but also our ability to interpret what’s going on as clearly as possible, and take action appropriate to the situation. Because OD work (and many other helping roles) require human interaction and relationships in their conduct, use of self will always be a critical factor in the effective execution of both help and change. By being a variable in a set of human equations, what we see, understand and do affects all the other variables as each cycle of work and interaction occurs. For these reasons, the study of use of self is foundational to both the field of OD and to each of us as human beings. This article is our establishment of a new way of understanding use of self and making it more actionable for those in professional helping roles.

What is Use of Self?

Use of self is *the conscious use of one’s whole being in the intentional execution of one’s role for effectiveness in whatever the current situation is presenting*. The purpose is to be able to execute a role effectively, for others and the system they’re in, without personal interference (e.g., bias, blindness, avoidance, and agendas) and with enough consciousness to have clear intentionality and

choice. Our use of self should always be thought of in a specific context, exercised through some role, in service of something helpful and aligned with one’s personal intentions (i.e., mission, vision, goals, and values).

“Who we are” always goes with us into each of our roles and situations. Our collective knowledge, thoughts, feelings,

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experiences, and vulnerabilities inform all that we do. Our understanding and beliefs about ourselves are continually evolving based on our independent assessments and what is socially constructed from our interactions with others (Shotter, 1997; Arnd-Caddigan & Pozzuto, 2008).

Our use of self shows up in several ways:

- » In how we appear, talk, and present ourselves (both our physical and personal presence)

- » In the invisible, but operable, parts of ourselves and our personalities, such as attitudes, values, motivations, biases, fears, assumptions, anxieties, feelings, habits, self-esteem, and hidden selves
- » In the actions we take, decisions we make, choices we pursue, and styles and preferences we use
- » In the strengths, experience, intelligences, knowledge, and skills we bring to each situation

Our use of self is further influenced by:

- » Race, ethnicity, national culture, gender, age, and social identities
- » Life and family histories
- » Intentions, personal agency, and self-efficacy, and
- » Levels of consciousness, self-awareness, and defensiveness

Managing our use of self begins with awareness, requires conscious sensing and interpreting, and takes form as a result of our intentional and unconscious actions. Learning to manage our use of self is a lifelong process as we are constantly receiv-

ing new and updated feedback on ourselves and our work.

In a 1995 presentation for the OD Network National Conference, Curran, Seashore, and Welp (1995) offered a model and concepts that provided a useful grounding for our work. They stressed the importance of developing awareness of one’s impact and ability to have choice in behaviors. Their work discussed many concepts for understanding how we can manage presence, congruence, influence,

and contact and how our ability to choose gets compromised by our own issues that serve as “hooks” in interaction with others and our inability to stay centered in the present situation.

The Use of Self Framework

To help understand and work with use of self, we have found it useful to think of the “self” as a collective portfolio of who we are, what we know, and what we can do as developed over a lifetime in both known and unknown realms. The “use” of self

In developing the “seeing” competency we need to pay attention to seeing self, seeing others, and seeing context. Social sensitivity to the surrounding system is a way to understand this competency. This sensitivity can be compromised by our biases, personal frames, operating metaphors, and habitual assumptions. Core to this competency is the ability to see “reality” as others see it and as free of our own biases as possible, which includes both what is visible to us and what we can take in.

is organized around three core competencies and three levels of development (Figure 1). Organizing use of self into a basic framework is a critical step in both understanding and applying the concept with more concrete behaviors and multiple levels of skill. This framework advances work on this concept by: 1) building on and incorporating what has been shared before, both within and outside of OD; 2) including and emphasizing action-taking, as part of managing, which has often been lacking in the over-emphasis on self-awareness; 3) focusing on concrete competencies for which a practitioner can develop skills; and 4) including developmental levels to provide ways to talk about how to improve or get better in use of self.

This framework captures the essence of what using ourselves involves over time. It includes two dimensions: 1) horizontal, represented as core competencies, and 2) vertical, represented as levels of development. Competencies describe the critical capabilities that practitioners use, in

every situation, and throughout all stages of development. Levels of development describe the ability of practitioners to apply these competencies in helping situations. Competencies are how practitioners help. Levels of development are how well practitioners do their work.

Core Competencies

» **Seeing** involves what practitioners are able to take in using the six senses. It is the competency of being aware of the world around us and the ability to take in as much data as possible. In develop-

ing the “seeing” competency we need to pay attention to seeing self, seeing others, and seeing context. Social sensitivity to the surrounding system is a way to understand this competency. This sensitivity can be compromised by our biases, personal frames, operating metaphors, and habitual assumptions. Core to this competency is the ability to see “reality” as others see it and as free of our own biases as possible, which includes both what is visible to us and what we can take in. It’s also critical to learn over time to see both what is on the surface and what is below the surface or covert (Marshak, 2006). Maintaining a spirit of inquiry and openness is critical to leveraging effective seeing. This is often deepened through reflection, meditation, or other practices of getting quiet and centered. In developing this competency it is helpful to:

- expand breadth and depth of inquiry and openness

- enlarge one’s scope of awareness
- be able to recognize multiple types of data
- become cognizant of personal filters and blocks
- identify one’s own individual and cultural biases

» **Knowing** involves making sense of what practitioners see. It is using a combination of knowledge and experience to organize information and draw hunches, conclusions, and interpretations. This process includes multiple ways of knowing (e.g., empirically, rationally, somatically, and socially constructed); practitioners may use a combination of many methods to give them meaning and confidence. In human systems work, the knowing phase often requires making meaning from limited data quickly and confidently. Knowing also comprises two key interpretive domains: learned theories (more objective) and internal mental models (subjective) developed through life experience. Both domains are crucial to the knowing process. The more objective domain contains theories, models and frameworks and allows practitioners to gain insights based on commonly held existing knowledge. The subjective domain, often understood as personal maps or mental models (Senge, 1990), allows practitioners to make use of internal belief systems, deeply held values, tacit knowledge, and profound life experiences. By combining the best external knowledge with one’s internal understanding, practitioners improve their ability to gain insight, leverage the right data, and use proper discretion. At higher levels of development, knowing is executed through deeply internalized knowledge which often actualizes as intuition. In developing this competency it can be helpful to:

- practice different ways of knowing
- exercise learning agility
- inventory various interpretive schemes and practice theories
- study academic research and publications

- work on integrating theory and experience into useable knowledge
 - develop awareness of cognitive and emotional components of knowing
 - identify meaning-making processes
 - recognize one's foundational values
 - raise one's consciousness of personal preferences and influences in decision-making
- » **Doing** involves the capacity for executing a full range of behavioral and action choices. It involves practitioners recognizing their options, demonstrating behavioral flexibility, and exercising personal skill and courage in a manner that delivers whatever is most helpful for a given situation. This capability executes the results of the previous two competencies. It is the culmination of the data intake and interpretation process that allows for the enactment of appropriate behavior. In developing this competency it can help to:
- develop one's skill repertoire
 - develop a portfolio of action alternatives
 - enhance one's ability to use will and courage
 - develop the ability to execute, implement, and follow through
 - enhance the ability to manage resistance
 - raise one's patience and perseverance
 - gain understanding of habitual preferences

This framework is intentionally simple. It represents the basic aspects of managing use of self. The competencies often operate within seconds of each other and should be understood as a dynamic representation of a practitioner's capacity to help. Competencies are constantly changing and evolving. Levels of development may be different for practitioners depending upon the topic and situation. One can move up and down the levels due to a variety of internal and external factors.

Levels of Development

Seeing human functionality through a developmental lens is critical to understanding use of self. Developmental theory states that human beings evolve through various levels of functionality, understanding, and outlook throughout their lives as they learn and grow. Persons must be seen as neither bad nor good, but in evolution through various phases of cognition, perception, individuation, and other categories that comprise the self (Kegan, 1982; Wilber, 2000). This developmental context, as applied to self, allows us to understand the various facets of the self that are growing throughout our lives. Thus, part of our work is to realize and integrate them as we grow.

In each competency there are levels of effectiveness that one can progress through. Each competency requires its own focus of attention and specific practice to improve. Below are the three stages that comprise the developmental component in the use of self framework.

Functionality is a stage of knowing "how to do it." One has learned what to do and how to operate in terms of basic aspects of seeing, knowing, and doing. One must concentrate and pay attention to doing it right, following appropriate steps or running through some criteria to determine use. One is starting to trust the material, method, technique, or concept. This may look like "doing it by the book" or applying theory to practice in a step by step fashion. This is similar to the phrase "conscious incompetence" or knowing what we are not sure of.

Efficacy is a further stage of development marked by increased flow and less concentration. Seeing, knowing, and doing become less challenging. The range of data available to work with, the knowledge available for sense-making and the behavioral flexibility of options and skills for taking action are expanded. It is marked by higher levels of confidence and agency in execution. We begin to operate from the inside and understand our role in what happens. The sequence of taking in, making meaning, and taking action become more

seamlessly integrated. One begins to trust one's self in use of data, meaning-making, and action. This is similar to the phrase "conscious competence" or we are clear about what we know and are good at.

Mastery is the highest stage of development and is characterized by fully integrated and seamless work. One's presence has greater impact. Seeing, knowing, and doing have become simultaneous, back and forth activities with little conscious decision-making. One's own self-awareness has opened up ego-free space for professional work. Intentionality and end purpose are intertwined and unencumbered. One ultimately trusts in the process, outcome, and their role in it. This stage is marked by effortless action and sometimes "magical" occurrences that appear to come out of deep intuition. The three competencies blend together and operate in one fluid motion (Csikszentmihalyi, 1990). The actions of the individual are marked by an internal drive versus an external reliance on material. At this stage, one's presence—the deliberate living out of one's values—becomes the greatest technique for impacting change in an environment. It is similar to the phrase "unconscious competence" or we are no longer aware of what we do exceptionally well.

While we may gradually progress upwards, even masterful practitioners will sometimes operate at a functional level. How well we are functioning as an instrument, in any competency, will determine what level we can perform at in the present situation. Additionally, it is possible to operate at a level of mastery for seeing, while a functional level for doing. In this way, the model is fluid, with movement up and down the pyramid in any given situation or day.

Role and Importance of Self Awareness

Our use of self engages cognitive, emotional, physical, and spiritual aspects at different moments and in different situations. Consequently, it requires development along all of these dimensions. The development process is a journey, mixing knowledge acquisition, self-awareness, and practice. Content knowledge provides concepts, frames of reference and

technical requirements for taking action. Self-knowledge helps to illuminate the emotional, physical, and spiritual aspects of ourselves with greater understanding of feelings, triggers, strengths, limitations, values, personality traits, personal meaning, preferences, sensitivities, and vulnerabilities. Through self awareness, we gain greater consciousness, leading to greater intentionality and choice, and grow out of the confines of limited frames, biases, skills, and habits.

Self-inquiry and personal growth is critical to successful use of self. Who we are and the work we do are inter-related and provide the milieu for our development. Thus, the development of self is a holistic practice where the human being and the work roles improve together. We can learn about ourselves and our internal landscape in many ways, including feedback, instruments, therapy, journals, and self assessment. Many times, we are thrown out of the nest early, utilizing unplanned opportunities to test our use of self. These situations offer significant opportunities, since the nature of growth is often an emergent phenomenon. The

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process of self-learning engages multiple cycles of awareness, interaction, and practice.

Self awareness has dominated much of the work in use of self and has overshadowed the importance of turning awareness into new behaviors or managing the use of self. This is especially limiting when

considering the importance of the whole self in human systems work.

Finding Our Whole Self

Wherever we show up, our whole self comes along! We are always more than we present, more than we know, and more than we can control. The Johari Window (Luft, 1963; Luft & Ingham, 1955) provides a way to navigate what is known and unknown and what is open and hidden. What we don't know can surprise us or hurt us or others. Learning about "blind" areas can help us act with greater integrity. Journeys into the "unknown" may uncover new capabilities or talents. Ironically, learning more about ourselves is not a solo endeavor, as Culbert once wrote, "It Takes Two to Know One" (Culbert, 1967).

Without whole self-awareness, we only enter situations with knowledge of part of who we are and may not have the consciousness and choice to manage or leverage how we use our self for the welfare of the situation. We may also become victims of our own behavior, routines or blind spots, and under-optimize what we ultimately do. So part of the journey is a

discovery of our different parts, selves, voices and messages, those we love and those we wish didn't exist, and accepting and integrating them into our whole being (Barry, 2008). By identifying, accepting, and re-integrating parts of who we are, we bring awareness and voice to these various selves, which allows us to not only understand them, but also to choose more fully

when they arise and how we want to use them.

Use of self is founded in part in OD's humanistic lineage, through an understanding and acceptance of our inherent human-ness. Bob Tannenbaum, building on the work of Carl Rogers and other humanistic psychologists was an early advocate of the whole-self concept and of personhood, which embraces growth as reclamation of our full humanity (Tannenbaum & Eisen, 2005; Tannebaum, 1995). Likewise, the Gestalt perspective (Perls, Hefferline & Goodman, 1951) includes embedded and unresolved messages within us which have been split off during early life and now live mostly in our unconscious. Gestalt theory teaches us that parts that have been split off, like any system, inherently strive for wholeness and re-integration. Shapiro (1976) highlighted how split parts of our selves can act like additional "personalities" that need to be acknowledged and integrated for self realization and personal growth. Similarly, Seashore, Shawver, Thompson and Mattare (2004) describe the various conscious and unconscious "selves" inside of us that compete for attention and come to the forefront at various times, depending on the trigger or type of interaction.

One difficulty in this self-discovery journey is that some of what we don't know about ourselves resides in the unconscious. Jung refers to these parts as the "Shadow" (Jung, von Franz, Henderson, Jacobi & Jaffe, 1964; Jung & Storr, 1983), representing the inherent split in consciousness occurring from aspects that we hide, repress, and deny. The shadow operates as dark to light creating a polarity to be managed. If unaware, we tend to project these shadow aspects of ourselves onto others- turning a personal inferiority into a deficiency in someone else. Our inner polarities operate similar to Argyris and Schon's (1974) espoused theory vs. theory in use-while one part of us is actively seeking one result, there can be repressed aspects seeking the opposite. Zweig and Abrams (1991) further elaborate on the many faces and powers of the dark side in our whole being.

Finally, another aspect of whole self,

from sociology, is the “masks” individuals wear in society. Goffman (1955; 1959) explored the concept that humans will attempt to guide or control impressions of others, behaving and acting differently in different scenarios. Masks represent who we want to be or hide some aspect of who we are. And while a person is managing their impressions, they may also attempt to place various masks on others as well. Our authenticity is often compromised by the use of masks.

A whole-self approach would seek to acknowledge the masks, selves, and

judged by others through our role execution

Though taking action requires a requisite amount of personal courage, even the most daring practitioner will encounter problems if the first two competencies are not executed properly. For example, a practitioner may be extremely skilled at confronting dysfunctional client behaviors. Yet this courageous act may do little-to-no good if it is employed in a client situation in which critical information has been missed or it has not been adequately understood.

and the welfare of the system are the higher purposes in helping roles. Expanding one’s behavioral repertoire helps to provide more options and greater confidence to act.

Self as Instrument of Change or Helping

Self as Instrument has often been used synonymously with use of self (Cheung-Judge, 2001; Smith, 1990; Glavas, Jules, & Van Oosten, 2006; McCormick & White, 2000). Technically, every use of self is instrumental in executing our role. Most often, this phrase has been raised in conjunction with change or helping, but could be just as relevant with other terms such as leading, healing, or learning. Because our use of self is so critical in professional relationships, we become instruments of the process we are trying to execute and of any changes we intend (Jamieson, 1991; Freshwater, 2002). If what we take in, understand, and do is related to any outcomes we achieve in our role, then our being becomes an instrument for seeing, knowing, and doing. That instrument can therefore be either highly effective across many situations, be of limited value in some situations, or stop working. It can become slow or inaccurate if we become unhealthy, emotionally knotted, or cognitively blocked. We can add functionality and advanced capabilities to our instrument over time and occasionally need to consider ways to renew and tune-up our instrument to maintain its usefulness (Heydt & Sherman, 2005). Our professional roles, including our ability to add value and do no harm, are helped or hindered by the instrumentality of our strengths and limitations, presence and movements, awareness and blind spots, cognitive and emotional intelligence, and fears and courage.

Managing Use of Self

In summary, we hope you take away these essential elements to understand and be able to manage your use of self:

Most practitioners earn their reputation and make their living based on the results that they achieve through their work. This can create high stakes for many, including their esteem, public identity, and valued rewards. The action decisions a practitioner makes can therefore be encumbered with extra anxiety, confusion, and consternation.

parts that make up our inner landscape and operate authentically. The whole-self approach is the acceptance and reclamation of our personhood (Palmer, 2004), of our humanity, and owning the polarity of our beings. By owning and accepting these aspects we can become more in charge of how we show up, begin to drop our masks and shields, and use our selves more authentically as agents of change.

The Role and Importance of Action-Taking

Using self awareness knowledge to influence behavior, intention, choice, and outcomes in service of another is where the “use of” comes into play. Doing something with self-knowledge is ultimately what counts! Action-taking represents the final stage in the use of self. It is the “Do,” as referenced in the See, Know, and Do framework. Taking action is also likely the most complex and risky aspect of the use of self for a number of reasons.

- » Helpful doing involves the culmination of effective seeing and knowing.
- » Having role clarity is key to determining effective, intentional action
- » The effectiveness of our work is mostly

The practitioner’s choice of role is critical in determining effective action steps. Schein describes three main consulting roles: pair-of-hands, expert, and process consultant (Schein, 1998). When considering action options, one must be clear about the intended role. Often the best action to take in a client situation is not completely clear. The practitioner needs to bring their will and skill to bear in conjunction with the array of options they believe are relevant to the situation and both make a choice and act in accordance with their role intentions.

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Action taking can also become challenged by falling into habitual patterns, becoming stuck in comfort areas, or choosing options that are self-serving. The client’s needs, the situation requirements,

- » Self-awareness leads to knowledge and consciousness about one’s self allowing for better management of intentionality, choice, and impact.
- » The desired end result is to perform

our role(s) in service of help for others or a system (the situation). When we are able to manage our use of self, we are instrumental in the effectiveness of processes and outcomes.

- » We use ourselves in all aspects of our work. We become the instrument for the core competencies of seeing, knowing, and doing. We take in data in order to understand what “reality” faces us. We use all we have learned (theory, experience, tools, etc.) to assess or make sense of what we see and to identify action alternatives and strate-

gies. We choose what to do and how to use our skills and will to take action.

Some dimensions operate simultaneously such as when we learn and use skills, methods, and tools and engage cognitive, emotional, and physical aspects. Reflection takes us singularly inside for some development, but social interaction (it takes two!) provides invaluable feedback from other perspectives.

- » In pursuing the best in everything we do, we will work through levels of development starting with functionality, growing into efficacy, and ending with mastery. At each level, our work looks,

Like any instrument, we need development, calibration, tuning, and maintenance. Developing use of self is a lifelong journey. We can start anywhere in our life movie. Some of who we are is known, some is not and is discoverable, and some will elude us forever. The whole self journey pursues what’s in and out of consciousness, what’s presenting and shadow, what selves and voices have residence in our inner landscape, what’s authentic and merely face-work . . .

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- » Development of use of self works on multiple dimensions such as, cognitive (theory, models, concepts, and tacit knowledge), emotional/interpersonal (EI, SI, CI, feelings, relations), spiritual (deeper meaning, higher powers, natural connections), and physical (somatic sensations, body-mind connections).

and feels different. As we progress in effectiveness, execution becomes more seamless, there is greater flow and integration, one uses less conscious concentration, and we move from being directed by outside forces to being guided internally, from working with others ideas (outside theories and tools) to our own (inside guidance, principles and choices).

And on any given day we will operate the best we can wherever we are, as humans participating in human systems!

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