

Herbert A. Shepard

Essence of a Proactive Life

Essays on Life and Career Planning

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Essence of a Proactive Life

Essays on Life & Career Planning

LIFE PLANNING, the first essay, helps readers build a life-worth-living and addresses such profound questions as "Who are we?" and "Who should we be?". It invites us to a candid self-examination which results in discovering those moments when we rejoice in life and find sources of fulfillment. The essay covers the three prerequisites for a deep gratification in life. When these prerequisites are in harmony we rejoice. "Life Planning" establishes a basis for living a meaningful life. It develops the awareness that we are responsible for the quality of our lives and that living fully means investing thoroughly in the creation of our experience. This investment involves risk and joy, two subjects thoroughly discussed in the last section of the essay.

HOW TO STAY ALIVE, the second essay, is an invaluable guide for change agents. It offers eight principles based on the author's experience in working with decision-makers and change agents. These principles range from avoiding self-sacrifice to building experiments for success. Other topics explored include retaining optimism, capturing the moment and recommending the ingredients for successful innovation.

About the Author

Herbert Allen Shepard

HERB SHEPARD was a pioneering thinker in the Organization Development movement, an engaging teacher and mentor of exceptional depth, scope and humility with a gift for recognizing and nurturing the potential of others. His unselfishness, utter sincerity, compassion and unwavering commitment touched lives, forged lasting friendships and helped shape the careers of a generation of leaders and social scientists. He held faculty posts at several universities including M.I.T., where he received his doctorate in Industrial Economics. He founded and directed the first doctoral program in Organization Development at Case Western; developed a residency in administrative psychiatry at Yale University School of Medicine, and was also President of The Gestalt Institute of Cleveland.

Herb conducted the first large-scale experiments in Organization Development, while at Esso in the late fifties, and served as principal consultant to TRW Systems in its pioneering work in the application of behavioral science to organizations and teams. He has published widely in this field¹²³ and was chairman of the Douglas Memorial Award Committee of the Journal of Applied Behavioral Science. His research and pragmatic work made a significant contribution to our understanding of human behavior and social systems from dyads (doctor-patient or consultant-client) to organizations (synergy, alternative dispute resolution, structure, building consensus and caring about the

Herbert Shepard

powerless). It opened the way for further developments in the psychology of teams, leadership and interpersonal compatibility; cognitive behavior therapy, social cognitive theory (educational psychology); choice theory; principled negotiation, positive psychology and organization development.

In management consulting, Herb's clients included Bell-Northern Research, Syncrude, Esso, TRW, Connecticut General Life Insurance Company, Union Carbide, USAID and most of the departments of the federal governments of the U.S.A. and Canada.

Herb advised clients of The Professional Development Institute and led executive seminars and workshops including “Managing in Turbulent Environment”, since 1975. He accepted the honorary title of President Emeritus for the Professional Development Institute which he held from 1977 till his death August 2, 1985. With his death, we have lost not only a mentor, but a warm person whose friendship, authenticity and values have been precious to us and are felt all the more deeply now.

Alain Paul Martin

First Essay

Life Planning

Life planning is planning life-worth-living. The choices you make today create your future, as well as your here-and-now. And you have some freedom of choice, today and tomorrow as well. We are only slowly emerging from an era of deterministic science when it was assumed that today's choices are completely the product of yesterday's choices, and the very notion of choice a quaint illusion. The psychologists assured us that life after the age of five was merely an unfolding of a personality set in early childhood. And our culture demands of each of us so many promises and contracts that most of us seem to have signed away our future choices. We seal our fates.

Many people see their futures as fated in another way. They think of the future as something that happens to them. When they are asked to draw a line representing the way they think about their total lives - from the beginning in the past to the end in the future - they can portray certain aspects of their past but are unable to map the future. The past can be reinterpreted, but it cannot be managed. Only the future is manageable, but these people have great difficulty in thinking about it that way. Some people plan their careers, and invest their energies in bringing about certain career achievements. Unfortunately, when people plan only their careers, the other aspects of their lives are unanticipated and sometimes unhappy consequences of their career choices. When these people draw their life lines, they draw only career lines.

Essence of a Proactive Life

Life planning is a self-confrontation. It is the induction of an identity crisis and a destination crisis for yourself. It requires

On the subject of what one ought to be, Khalil Gibran had this story to tell:

*"It was in the garden of a madhouse that I met a youth with a face pale and lovely and full of wonder. And I sat beside him upon the bench, and I said, 'Why are you here?' And he looked at me in astonishment, and he said, 'It is an unseemly question, yet I will answer you. My father would make of me a reproduction of himself; so also would my uncle. My mother would have me the image of her illustrious father. My sister would hold up her seafaring husband as the perfect example for me to follow. My brother thinks I should be like him, a fine athlete. 'And my teachers also, the doctor of philosophy, and the music master, and the logician, they too were determined, and each would have me but a reflection of his own face in a mirror. 'Therefore I came to this place. I find it more sane here. At least I can be myself.' Then of a sudden he turned to me and he said, 'But tell me, were you also driven to this place by education and good counsel?' And I answered, 'No, I am a visitor.' And he said, 'Oh, you are one of those who live in the madhouse on the other side of the wall.'"*⁴

The location of the madhouse is less important than whether either the inmate or the visitor has learned to make his own life worth celebrating. What were those moments when you rejoiced in life, when you were fully alive, and living fully, and experiencing fulfillment?

Essence of a Proactive Life

You're likely to find that many of them were quite "simple" , and had little to do with the way you spend most of your time. If you can identify the conditions under which your life is fulfilling, you can set about creating those conditions.

Easier said than done. A basic fact of life - that it is to be lived fully - is difficult to grasp. Lyndon Johnson's widow, reflecting on their last years together, commented:

“To be close to death gives you a new awareness of the preciousness of life, and the extreme tenuousness of it. You must live every day to the fullest, as though you had a short supply - because you do. I said that glibly for years, but I didn't know how intensely one should live.”⁵

Some people can apprehend the preciousness of life by writing their own obituaries, focusing on activities and feelings, and writing the obituary twice: once as an extrapolation of present life style, and again as one would wish it to be. But many others find this rather direct way of facing the question, "What shall I do with the time I have left?" too threatening to be taken seriously.

What are the conditions under which it is possible to rejoice in life? Perhaps one can learn from infants. An infant rejoices when it can affect its environment in ways that please it. It rejoices in loving and playful interaction with other beings. And it rejoices in the functioning of its own body. These three sources of fulfillment, translated into adult words, can be called autonomy, resonance and tone.

As used here, autonomy refers to your ability to create a world worth living in for yourself. Typically, the

Essence of a Proactive Life

autonomous person has many skills useful to himself and society, continually develops his physical, emotional and intellectual capacities, can relate in many ways to others, is proactive and foresighted, imaginative and realistic, takes responsibility for his choices and their consequences, is open to new experience and learns from it. But the essence of autonomy is not what one's resources are, but how they are used, the purpose they serve: namely, the creation and maintenance of a world worth living in. Thus autonomy differs from related terms like power, skill, achievement, independence or wealth, which may become ends in themselves, or may be used to create a world for oneself that is not worth living in. The characteristics of such a world and of autonomy are not the same for every person. Robert Frost described the meaning of autonomy in the poet's world:

*“The reason artists show so little interest
In public freedom is because the freedom
They've come to feel the need of is a kind
No one can give them - they can scarce attain –
The freedom of their own material;
So, never at a loss in simile,
They can command the exact affinity
Of anything they are confronted with.
This perfect moment of un-bafflement,
When no man's name and no noun's adjective.
But summons out of nowhere like a jinni.
We know not what we owe this moment to.
It may be wine, but much more likely love
Possibly just well-being in the body,
Or respite from the thought of rivalry.
It's what my father must mean by departure,
Freedom to flash off into wild connections.
Once having known it nothing else will do.
Our days all pass awaiting its return.”⁶*

Essence of a Proactive Life

The second source of fulfillment is resonance, a relationship with other beings which is empathic, responsive, mutually stimulating and expansive for all those involved. The term can describe a person's relationship with other environments as well. Resonance differs from the common meaning of love, which is usually understood to be an exchange relationship rather than a resonance relationship. Freya Stark describes the essence of resonance in following passage:

*“For it must be remembered that silence
can be dead or living,
and the two kinds must be distinguished.
And perhaps the Poles of Being are in the distinction
the one an end and a downfall and a destruction,
and the other a part of that which has neither beginning
nor end; and even in the humblest instance
there is a difference in the silence of these two.
There is, for instance, regrettably often
a noticeable blank in the wedded silence,
when a couple have been married a long time.
One sees them in restaurants or on cruises - middle-
aged, averted faced that turn toward each other
with no light in their eyes and drop words
of such astonishing triviality that one wonders
how the air consents to carry them:
surely the sort of conversation Sartre was thinking of
when he described Hell as one prolonged
domestic scene.
Yet if a young creature were to ask for advice
whether to say yes or no to the man or woman
she or he thought of marrying,
one might do worse than ask:
'Are you happy to be silent together?'
That companionship is the living silence - a relaxation*

Essence of a Proactive Life

*that finds speech superfluous, an atmosphere
of well-being
where nothing needs to be explained,
a part of that current which can make not only men
but most living things happy to be together.
It is, I like to imagine, the stream that flows
beneath all differences of language
and carries each one of us from those cindery
beginnings toward our undiscovered end.”⁷*

The third source of fulfillment, tone, is an alertness of all the senses and organs. The meaning we attach to the term "muscle tone" captures the quality referred to as the tone of the whole organism - sensory, mental, emotional, muscular, etc. The concept of tone differs from the concept of health. Health is usually regarded as something different from physical health. Tone is a psycho-physiological concept: anxiety is as much its enemy as drugs. Lowen expresses this idea as follows:

*“A person experiences the reality of the world
only through his body.
...If the body is relatively un-alive, a person's
impressions
and responses are diminished. The more alive
the body is,
the more vividly does he perceive reality
and the more actively does he respond to it.
We have all experienced the fact
that when we feel particularly good and alive,
we perceive the world more sharply...
The aliveness of the body denotes
its capacity for feeling.
In the absence of feeling the body goes 'dead'
insofar as its ability to be impressed by
or respond to situations is concerned.
The emotionally dead person is turned inward:*

Essence of a Proactive Life

*thoughts and fantasies replace feeling and action;
images compensate for the loss of reality.
...It is the body that melts with love, freezes with fear,
trembles in anger, and reaches for warmth and contact.
Apart from the body, these words are poetic images.
Experienced in the body, they have a reality
that gives meaning to existence.*"⁸

When autonomy, resonance and tone are all high, we rejoice in life. This is a peak experience, and as Frost says, "Once having known it, nothing else will do." The three are closely intertwined: if autonomy is used in ways that reduce resonance, it will not produce a world worth living in; low tone will adversely affect resonance and autonomy. Treating them as separate aspects of life-worth-living may have some value in the life planning process for persons who have been spending all their energies on work and neglecting their relationships with others or their own bodies; or for persons who only feel strong when they are going against others and don't know that it is possible to be strong when going with others; or for persons who overeat at the expense of tone and resonance; or for persons with many resources, persons who possess the elements making for autonomy, but have experienced little fulfillment.

How does the infant's delighting in its experience of autonomy become transformed into the adult's striving for status and winning over others? How does the infant's joy in resonance become transformed into the adult's view of love as a commodity and commodities as substitutes for love? How does the infant's joy in its own body become transformed into emotional deadness? Perhaps it is because our socializing institutions demand that the child give up his search for autonomy in exchange for packages of pseudo-resonance. Whatever the telling events in the process of socialization are,

Essence of a Proactive Life

many people "grow up" having learned "truths" that blind them to life...

Life planning is essentially an invitation to explore new perspectives from which to view past experience, one's current life, and future alternatives... The value system we inherited is not necessarily designed to make life-worth-living.

The discovery and creation of perspectives that deepen our appreciation of ourselves in the universe is the fourth aspect of life-worth-living. It is akin to resonance, as suggested by the terminology William O. Douglass used to describe what is meant here by perspective:

*“Man is whole when he is in tune with the winds,
the stars and the hills as well as with his neighbors.
Being in tune with the apartment or the community
is part of the secret.
Being in tune with the universe is the whole secret.”*

In everyday experience, being in tune with the universe, or having an adequate perspective, means seeing problems from above rather than from underneath, means not getting locked in to one end or the other of a presumed polarization, means being free in your situation rather than dependent on it, means owning your behavior rather than claiming someone else's behavior "caused" yours.

Life planning is a quest, and it is also a continuous part of life-worth-living. And while the life planning process and outlook described here may help you to live more fully, it will not protect you from pain. Developing towards higher levels of autonomy, resonance, tone and perspective faces you with all the awkwardness, mistakes and painful choices involved in any learning. Living

Essence of a Proactive Life

more fully means investing yourself more fully in the creation of your experience: and anything you invest yourself in to the point that it can bring you great joy can also bring you great grief by its loss.

Essence of a Proactive Life

Second Essay

How to Stay Alive

The following aphorisms are not so much bits of advice as things to think about when you are being a change agent, a consultant, an organization or community development specialist - or when you are just being yourself trying to bring about something that involves other people.

RULE I: Stay alive.

This rule counsels against self-sacrifice on behalf of a cause that you do not wish to be your last.

Two exceptionally talented doctoral students came to the conclusion that the routines they had to go through to get their degrees were absurd, and decided they would be untrue to themselves to conform to an absurd system. That sort of reasoning is almost always self-destructive. Besides, their noble gesture in quitting would be unlikely to have any impact on the system they were taking a stand against.

This is not to say that one should never take a stand, or a survival risk. But such risks should be taken as part of a purposeful strategy of change, and appropriately timed and hedged. When they are taken under such circumstances, one is very much alive.

But Rule I is much more than a survival rule. The rule means that you should let your whole being be involved in the undertaking. Since most of us have never been in touch with our whole beings, it means a lot of putting together of parts

Essence of a Proactive Life

that have been divided, of using internal communication channels that have been closed or were never opened.

Staying alive means loving yourself. Self-disparagement leads to the suppression of potentials, to a win-lose formulation of the world, and to wasting life in defensive maneuvering.

Staying alive means staying in touch with your purpose. It means using your skills, your emotions, your labels and positions, rather than being used by them. It means not being trapped in other people's games. It means turning yourself on and off, rather than being dependent on the situation. It means choosing with a view to the consequences as well as the impulse. It means going with the flow even while swimming against it. It means living in several worlds without being swallowed up in any. It means seeing dilemmas as opportunities for creativity. It means greeting absurdity with laughter while trying to unscramble it. It means capturing the moment in the light of the future. It means seeing the environment through the eyes of your purpose.

RULE II: Start where the system is.

This is such ancient wisdom that one might expect its meaning had been fully explored and apprehended. Yet, in practice the rule - and the system - are often violated.

The rule implies that one should begin by diagnosing the system. But systems do not necessarily like being diagnosed. Even the term diagnosis may be offensive. And the system may be even less ready for someone who calls himself or herself a change agent. It is easy for the practitioner to forget that the use of jargon that prevents laymen from understanding the professional mysteries is a hostile act.

Essence of a Proactive Life

Starting where the system is can be called the Empathy Rule. To communicate effectively, to obtain a basis for building sound strategy, you need to understand how clients see themselves and their situation, and you need to understand the culture of the system. Establishing the required rapport does not mean that the change agent who wants to work in a traditional industrial setting should refrain from growing a beard. It does mean that, if he has a beard, the beard is likely to determine where the client is when they first meet, and the client's curiosity needs to be dealt with. Similarly, the rule does not mean that a female change agent in a male organization should try to act like one of the boys, or that a young change agent should try to act like a senior executive.

One thing it does mean is that sometimes where the client is, is wondering where the change agent is. Rarely is the client in anyone place at anyone time. That is, he/she may be ready to pursue any of several paths. The task is to walk together on the most promising path.

Even unwitting or accidental violations of the empathy rule can destroy the situation... Sometimes starting where the client is, which sounds both ethically and technically virtuous, can lead to some ethically puzzling situations. Robert Frost described a situation in which a consultant was so empathic with a king who was unfit to rule that the king discovered his own unfitness and had himself shot, whereupon the consultant became king.

Empathy permits the development of a mutual attachment between client and consultant. The resulting relationship may be one in which their creativities are joined, a mutual growth relationship. But it can also become one in which the client becomes dependent and is manipulated by the consultant. The ethical issues are not associated with starting where the system is, but with how one moves with it.

RULE III: Never work uphill.

This is a comprehensive rule, and a number of other rules are corollaries or examples of it. It is an appeal for an organic rather than a mechanistic approach to change, for a collaborative approach to change, for building strength and building on strength. It has a number of implications that bear on the choices change agents make about how to use themselves, and it says something about life.

- **Corollary I: Don't build hills as you go.**

This corollary cautions against working in a way that builds resistance to movement in the direction you have chosen as desirable. For example, a program which has a favorable effect on one group may have the opposite effect on another...

- **Corollary 2: Work in the most promising arena.**

The physician-patient relationship is often regarded as analogous to the consultant-client relationship. The results for system change can be unfortunate. For example, the organization development consultant is likely to be greeted with delight by executives who see in his/her specialty the solution to a hopeless situation in an outlying plant. Some organization development consultants have disappeared for years because of the irresistibility of such challenges. Others have whiled away their time trying to counteract the Peter principle by shoring up incompetent managers.

- **Corollary 3: Build resources.**

Don't do anything alone that could be accomplished more easily or more certainly by a team. Don Quixote is not the only change agent whose effectiveness was handicapped by ignoring this rule. The change agent's task is a heroic one,

but the need to be a hero does not facilitate team building. As a result, many change agents lose effectiveness by becoming spread too thin. Effectiveness can be enhanced by investing in the development of partners.

- **Corollary 4: Don't over-organize.**

The democratic ideology and theories of participative management that many change agents possess can sometimes interfere with common sense. Two years ago, I offered a course, to be taught by graduate students. The course was over subscribed. It seemed that a data-based process for deciding whom to admit would be desirable, and that participation of the graduate students in the decision would also be desirable. So I sought data from the candidates about themselves, and shared their responses with the graduate students. Then the graduate students and I held a series of meetings. Then the candidates were informed of the decision. In this way we wasted a great deal of time and everyone felt a little worse than if we had used a commonsense or arbitrary decision rule.

- **Corollary 5: Don't argue if you can't win.**

Win-lose strategies are to be avoided because they deepen conflict instead of resolving it. But change agents should build their support constituency as large and deep and strong as possible so that they can continue to risk.

- **Corollary 6: Play God a little.**

If the change agent doesn't make the critical value decisions, someone else will be happy to do so. Will a given situation contribute to your fulfillment? Are you creating a better world for yourself and others, or are you keeping a system in operation that should be allowed to die? For example, the public education system is a mess. Does that mean that the

Essence of a Proactive Life

change agent is morally obligated to try to improve it, destroy it, or develop a substitute for it? No, not even if he or she knows how. But the change agent does need a value perspective for making choices like that.

RULE IV: Innovation requires a good idea, initiative and a few friends.

Little can be accomplished alone, and the effects of social and cultural forces on individual perception are so distorting that the change agent needs a partner, if only to maintain' perspective and purpose.

The quality of the partner is as important as the quality of the idea. Like the change agent, partners must be relatively autonomous people. Persons who are authority-oriented - who need to rebel or to submit - are not reliable partners; the rebels take the wrong risks and the good soldiers don't take any. And rarely do they command the respect and trust from others that is needed if an innovation is to be supported. The partners need not be numerous. For example, the engineering staff of a chemical company designed a new process plant using state-of-the-art technology. The design departed radically from the experience of top management, and they were about to reject it. The engineering chief suggested that the design be reviewed by a distinguished engineering professor... who told the management that it was brilliantly conceived and executed. Thus the engineers not only implemented their innovation, but also grew in the esteem of their management.

An alternative statement of Rule IV is as follows: find the people who are ready and able to work, introduce them to one another, and work with them. Perhaps because many change agents have been trained in the helping professions, or because we have all been trained to think bureaucratically, concepts like organization position, representativeness or

Essence of a Proactive Life

need are likely to guide the change agent's selection of those he or she works with. A more powerful beginning can sometimes be made by finding those persons in the system whose values are congruent with those of the change agent, who possess vitality and imagination, and who are eager to learn. Such people are usually glad to have someone like the change agent join in getting something important accomplished, and a careful search is likely to turn up quite a few. In fact, there may be enough of them to accomplish a general system change, if they can team up in appropriate ways. In building such teamwork the change agent's abilities will be fully challenged, as he/she joins them in establishing conditions for trust and creativity, dealing with their anxieties about being seen as subversive, enhancing their leadership, consulting, problem-solving, diagnosing and innovating skills, and developing appropriate group norms and policies.

RULE V: Load experiments for success.

This sounds like counsel to avoid risk taking. But the decision to experiment always entails risk. After that decision has been made, take all precautions.

The rule also sounds scientifically immoral. But whether an experiment produces the expected results depends upon the experimenter's depth of insight into the conditions and processes involved. Of course, what is experimental is what is new to the system; it may or may not be new to the change agent.

Use the Hawthorne effect. Even poorly conceived experiments are often made to succeed when the participants feel ownership. And conversely, one of the obstacles to the spread of useful innovations is that the groups to which they are offered do not feel ownership of them.

Essence of a Proactive Life

For example, if you hope to use experience-based learning as part of your strategy, the first persons to be invited should be those who consistently turn all their experiences into constructive learning. Similarly, in introducing team development processes into a system, begin with the best functioning team.

Maintain voluntarism. This is not easy to do in systems where invitations are understood to be commands, but nothing vital can be built on such motives as duty, obedience, security-seeking or responsiveness to social pressure.

RULE VI: Light many fires.

Not only does a large, monolithic development or change program have high visibility and other qualities of a good target, it also tends to prevent subsystems from feeling ownership of, and consequent commitment to the program.

The meaning of this rule is more orderly than the random prescription - light many fires - suggests. Any part of a system is the way it is partly because of the way the rest of the system is. To work towards change in one subsystem is to become one more determinant of its performance. Not only are you working uphill, but as soon as you turn your back, other forces in the system will press the subsystem back towards its previous performance mode.

If many interdependent subsystems are catalyzed, and the change agent brings them together to facilitate one another's efforts, the entire system can begin to move.

Understanding patterns of interdependency among subsystems can lead to a strategy of fire-setting. For

Essence of a Proactive Life

example, in public school systems it requires collaboration among politicians, administrators, teachers, parents and students to bring about significant innovation, and active opposition on the part of only one of these groups to prevent it. In parochial school systems, on the other hand, collaboration between the administration and the church can provide a powerful impetus for change in the other groups.

RULE VII: Keep an optimistic bias.

Our society grinds along with much polarization and cruelty, and even the helping professions compose their world of grim problems to be worked through. The change agent is usually flooded with the destructive aspects of the situations he/she enters. People in most systems are impressed by one another's weaknesses, and stereotype each other with such incompetency as they can discover.

This rule does not advise ignoring destructive forces. But its positive prescription is that the change agent be especially alert to the constructive forces which are often masked and suppressed in a problem-oriented, envious culture.

People have as great an innate capacity for joy as for resentment, but resentment causes them to overlook opportunities for joy. In a workshop for married couples, a husband and wife were discussing their sexual problem and how hard they were working to solve it. They were not making much progress, since they didn't realize that sex is not a problem but an opportunity.

Individuals and groups locked in destructive kinds of conflict focus on their differences. The change agent's job is to help them discover and build on their commonalities, so that they will have a foundation of respect and trust which will permit them to use their differences as a source of creativity. The unhappy partners focus on past hurts, and continue to destroy

Essence of a Proactive Life

the present and future with them. The change agent's job is to help them change the present so that they will have a new past on which to create a better future.

RULE VIII: Capture the moment.

A good sense of relevance and timing is often treated as though it were a gift or intuition rather than something that can be learned, something spontaneous rather than something planned. The opposite is nearer the truth. One is more likely to capture the moment when everything one has learned is readily available.

Perhaps it's our training in linear cause-and-effect thinking and the neglect of our capacities for imagery that makes us so often unable to see the multiple potential of the moment. Entering the situation blank is not the answer. One needs to have as many frameworks for seeing and as many strategies for acting as possible. But it's not enough to involve only one's head in the situation; one's heart has to get involved too. Cornelia Skinner once said that the first law of the stage is to love your audience. You can love your audience only if you love yourself. If you have relatively full access to your organized experience, to yourself and to the situation, you will capture the moment more often.

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