Integration of Core Values in Support of a Flourishing Life

A Capstone Action Research Project
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Master of Arts in Ethical Leadership
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Abstract

This Capstone Virtual Action Research Project focused on supporting increased states of flourishing through greater life integration of core-values. The participants began as leaders in the theatrical industry, and evolved to include any adults that I was connected to, embracing participants from across the United States and Scandinavia. The desired change was to use a 10-day reflective exercise to deepen understanding of core values, and then, in the week following the research, to make one change in values-integrated time use. From a webpage hub, I created a “one-stop shopping” research project where participants obtained all needed information to participate. The primary methods of measurement were surveys, and an optional video exit interview. The results showed increased core-value knowledge, application of that knowledge to decision making, and concretized changes in the construction of the participants’ schedules to better integrate core values into their lives. While obtaining participants’ buy-in was a challenge, ultimately the sixteen fully participating stakeholders successfully navigated the project, and provided data that showed positive, core-values-based changes. For the future, a longer process, and integration into more advanced virtual technology, or an app, would enable participants to keep going with positive changes, and further deepen core values knowledge.

Keywords: action research, virtual action research, ethical leadership, core values, flourishing, values integration
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CHAPTER 1 - Introduction to Project and Evidence of Mindfulness

Purpose and Scope

This Capstone project focused on the discovery of core values and related time-use alignment changes, in support of life integration and increased states of flourishing for the participants. In this chapter, the participants’ desired change from the Capstone’s process is explored, followed by information about the participants, and the research exercise itself. Then, my core values and the significance of them to this Capstone project are discussed. Next, limitations of action research in general, and this project in particular, are highlighted, followed by definitions of significant terms of my Capstone project.

Desired Change

The Capstone’s desired change was for the participants to use a 10-day reflective exercise to deepen their understanding of their core values, and their time use around those values, and then, in the week following the research, to make one change in time use toward more values inclusion in their lives.

In the 10-day exercise, the participants focused on discovering if reflecting on their core values, and purposefully beginning to orient around them, would begin the process of long-term change toward the creation of a lifestyle reflective and supportive of those values. Micro changes can get the ball rolling toward long term results using the “interesting psychological phenomenon called behavioral momentum” (Albright, 2015). The Capstone change process is anchored in the research question:

Because I value human flourishing, I want to study lifestyle integration, to better prioritize and align my time and activities with core values, and then apply this knowledge as an ethical leader both to my life, and to construct a project to support
Capstone stakeholder-participants’ flourishing through their learning about their core-values and related lifestyle integration.

Supportive research shows the importance of core value knowledge in human flourishing, including Dr. Brian Little’s personal projects analysis (PPA) research ("Dr. Brian R. Little," 2016), which demonstrated “that human flourishing is enhanced when individuals engage in personal project pursuit” (Little, 2006). Goals and actions aligned with purpose unique to the individual enhance the effectiveness of delivery of those goals, and overall contribute to a state of flourishing (Little, 2006). Echoing the benefits of alignment of life and core values, is the work of Peggy Noe Stevens, an author and architect of branding who suggests that we have to ask what our purpose is, so that we can organize and strategize our prioritization of activities effectively (Stevens, 2012). Similarly, in the book Act Like a Leader, Think Like a Leader, author Ibarra asks the reader to figure out “How Do You Spend Your Time?” (Ibarra, 2015, pp. 34-35), and offers exercises such as the creation of a personal “hierarchy of needs” pyramid (Ibarra, 2015, p. 32). Identification of core values is an important part of creating a personally supportive strategy of time use, for the benefit of self and others, built around a life with purpose.

Participants

The original demographic for the Capstone participants was entertainment industry professionals who are in leadership positions. However, based on advice from a Claremont Lincoln University professor, this pool of people expanded to any adult connected to me, no matter what industry or profession with which they were involved. Because I was unemployed and without an organization, the participants were not part of a single organization. Rather, I connected with them virtually, and formed a Capstone community through their participation.
The Applied Research Exercise

The Capstone action-research exercise was 10 days in length, plus a short amount of work prior to and following the 10-days of research, and all virtual. Prior to the 10-day start, participants utilized a core values worksheet (Stan Ward) (Appendix D) and answered a survey with these questions: What are your top three core values? To what extent do you incorporate these values into how you use your time? Would you participate in a 10-15-minute video (or phone) exit interview? The first two questions were to establish preliminary information about their core values, and how the participants’ lives are oriented around their values, and the third question was to aid me in preparation for the optional video (or phone) exit interview (See Appendix I).

Then, for nine days, the Capstone participants engaged in the applied research which was a reflective exercise on core values that took about 5 minutes per day in total to complete. The reflective exercise was based on “The 10 Day Inner Values Exercise” developed for Executive MBA students at Loyola Marymount University (Manning, Waldman, Lindsey, Newberg, & Cotter-Lockard, 2013, pp. 53-57). During these nine days, the participants were asked to jot down what core values arise, so that they had a collection to choose from and a record of their journey. The goal was to make it as small and easy a time commitment as possible, and still engage the participants in a thoughtful way that might lead to change.

On the 10th day, Capstone participants went through the same reflective exercise as days 1-9. Then, they did two more rounds of minute long reflections. For the first round, they reflected on which two or three core values they could commit to as their top values. For the second round, they reflected upon the upcoming week, and how their values were or were not incorporated into their time use. Then participants picked one action they could take in the upcoming week to
better incorporate their top values into their time use. Following this, the Capstone participants completed an end survey with these questions: What are your top three core values? To what extent do you incorporate these values into how you use your time? What, if anything, has changed in your understanding of core values and/or incorporation of those values into your life? Is there anything else you would like to share? The participants who opted in to the optional video exit interview were then contacted to complete this. The primary prompt for the exit interview was, “What are your take-aways from this experience?” (See Appendix H).

The hub for the project was a webpage on my personal website (https://www.hilaryadams.com/action-research) (See Appendix F). Communication was, per participant request, through text, messages (social media), and email, and participants were steered to the webpage for further information, materials, surveys, and to upload and share their responses. The action-research part of the project took place May 1-10, 2017, and the follow up with the participants regarding findings, shared on the webpage, was on May 21, 2017. The future possibilities for Capstone-related plans are in evaluation for consideration and viability.

Guiding Values and Project Significance

Core Values

My guiding core values are happiness and integrity. I define these as follows:

Integrity: Integrity is living so that my beliefs, thoughts and actions are aligned. The idea of integrity includes, for me, committing to responsibly living fully, using my skills and talents in the most optimum way possible, and not settling for where I am but always pushing forward with new skills, knowledge, and practices that can optimize my potential for contribution to the greater good.
Happiness: The essence of happiness is, for me, is to do what is positive for health, growth, and expression of self, and to diminish or avoid altogether that which is not. There is also a social engagement definition of happiness, which I find agreeable, used more often in collectivist cultures, where “pro-social behaviors…and social relationships” are one type of the defining hallmarks of being happy (Lombozo, 2017).

In studying to be an ethical leader, I found a gap between my core values and how I was living my life. Although I was employed in my field of choice, leadership in community theatrical participation, I was not able to be authentically who I was, and I found myself making choices to stay silent when I felt I should speak up about practices in the organization and with programming choices. I also found myself unable to be an agent of change, which I had been hired to be, because of a corporate culture of silence, hostility, and passive aggressive irresponsibility, as well as unwillingness to have the deeper conversations on which I, and I think art and community development, thrive. My boss was a bully, and I found myself alternating between depression, and panic when I drove to work in the morning. Having panic on the way to work every day is a clear indicator that the body has identified something that the mind is suppressing! So, I sat myself down and looked hard at my life.

To be an ethical leader is to line up with your core values in your actions, and to manage your life intentionally and mindfully, to be able to effectively lead and contribute. Once I saw how far off I was from that alignment, I acted: I resigned from the toxic workplace. The Capstone project was born from my realization of how far off from my core values I was in my use of time, and I thought of all my equally overworked and undercompensated colleagues in the entertainment field who should be happy, engaged in what they love, but, instead, often seem stressed, tired,
and thus, I assumed, also most likely not able to fully express being the brilliantly creative, contributing people they are.

When I discussed this idea with people outside of the entertainment profession, the mismatch between values and life seemed to be a universally understood phenomena. When it was recommended to include participants not in the entertainment profession, this went hand in hand with what I discovered about how this awareness of core values, and reflection on how time use related to those values, might be of benefit to many people. Although participants in the Capstone project might or might not take such drastic action as I did to remedy value-time misalignment, even small actions to spend time differently, or make choices to support an element of life that is important to a person and has been neglected, can go a long way toward a happy, flourishing life. This, in turn, optimizes a person’s ability to contribute to the world in their unique way. In *The Happiness Advantage*, author Achor supports the idea that creating flourishing in one’s life promotes greater possibilities for engagement and growth. Achor writes, “happiness and optimism actual fuel performance and achievement,” and that “cultivating positive brains makes us more motivated, efficient, resilient, creative, and productive, which drives performance upward” (Achor, 2010, pp. 3-4).

**Limitations**

Action research projects in general have limitations such as not being generalizable, linear or conclusive (Kell, 2012, p. 3). There may also be difficulties “in distinguishing between action and research and [ensuring] the application of both,…[d]elays in completion of action research due to a wide range of reasons,” and a “[l]ack of repeatability and rigour” (“Action Research,” 2016). It may also be challenging to balance the roles “as researcher and change facilitator” (VanDeusen Lukas, 2008, p. 22). This Capstone project had the specific limitations of:
• Technical limitations constrained by my ability to create a webpage.

• Geographical challenges from the stakeholders not being in the same room, or location, and, instead, connected virtually by webpage interface and electronic communications. This also made it difficult to recruit stakeholders.

• Small sample size.

• Measurement primarily by surveys. Surveys have the limitation that they “[m]ight not get careful feedback…[and do not] get [the] full story” ("Basic Guide to Program Evaluation (Including Outcome Evaluation)," 2017).

Definitions of Terms

Terms that are significant to this Capstone project are:

• Core values: Those values that “emanate from the center of who we are and what is most important to us as a human being” (Stevenson, 2013).

• Positive Psychology: The Positive Psychology Institute defines positive psychology as “the scientific study of human flourishing, and an applied approach to optimal functioning. It has also been defined as the study of the strengths and virtues that enable individuals, communities and organisations to thrive” (Gable & Haidt, 2005, Sheldon & King, 2001, as cited in "What is Positive Psychology," 2012).

• Flourishing: According to psychologist Martin Seligman, a foundational thinker in the field of positive psychology, “the gold standard for measuring well-being is flourishing, and…the goal of positive psychology is to increase flourishing. Flourishing rests on five pillars, each of which we value for its own sake, not merely as a means to some other end” (Martin E.P. Seligman, 2011). The five pillars are: Positive emotion, engagement, relationships, meaning, and accomplishment (Martin E.P. Seligman, 2011).
CHAPTER 2 - Literature Review and Initial Stakeholder Dialogue

Introduction to Literature Review

The major question researched through the literature review was if a Capstone stakeholder-participant taking time to learn about, and reflect upon, their core values, might aid in their development, or enhancement, of flourishing through alignment of time use with values, including lifestyle integration. This chapter includes a brief contextualizing overview about the field of positive psychology, and information regarding the types of research and search terms used for the literature review, and then investigates past, current and future perspectives on flourishing and lifestyle integration. Next, stakeholder-participant perspectives on flourishing and lifestyle integration are considered, including unique challenges from the set of participants in this Capstone. Following this, the conclusion highlights six important literature review resources that were turning points in my understanding, and reframing of, the issue of flourishing and lifestyle integration.

The field of positive psychology, which human flourishing falls into, is just over 10 years old, and research findings are filled with less answers than questions, and often call for additional research. This makes for exciting possibilities regarding the development of ethical leadership-based lifestyle balancing. One of the major shifts during this time is from hedonistic well-being to eudemonic well-being which is not constrained to joy and pleasure for happiness, but, instead, includes meaning and purpose (Joseph, 2015).

During this 10-year shift, an important change that continues to organize and influence positive psychology today is that authentic happiness theory was replaced by well-being theory. Well-being theory’s measurements and goal serve also as themes that reoccur throughout the research on flourishing and lifestyle integration. The measurement for well-being theory shifted
from life satisfaction, in the authentic happiness theory, to more complex measuring of positive emotion, engagement, meaning, positive relationships, and accomplishment, also known by the acronym PERMA (Martin E. P. Seligman, 2013). The goal of well-being theory is to “increase flourishing by increasing positive emotion, engagement, meaning, positive relationships, and accomplishment” (Martin E. P. Seligman, 2013, p. 12). and to deploy your “highest strengths” which lead “to more positive emotion, to more meaning, to more accomplishment, and to better relationships” (Martin E. P. Seligman, 2013, p. 24). Throughout this research, the tools, ideas, and studies show that it is possible to intentionally cultivate well-being theory’s elements of PERMA to build a flourishing life integrative of core values.

Research

Research was conducted online, mainly during May-June 2016. Google scholar proved to be a useful search engine. In August 2016, a document provided for CLU course work proved invaluable: “Personal Inner Values: A Key to Effective Face-To-Face Business Communication” (Manning et al., 2013). In this paper, I found the exercise that fit with the research I was interested in conducting, and I adapted it for the action research.

Main search terms used. Main search terms used include: Lifestyle balancing, lifestyle integration, stress reduction, happiness, core values, values orientation, resiliency, personal values statements, work-life purpose, work-life balance, work-life integration, positive psychology, time-use (too broad), time-management, and flourishing. The types of literature searched included: books, professional journals, academic papers, CLU materials, online references to published papers, and online articles.

Past perspectives on Flourishing and Lifestyle Integration

Understanding past perspectives on flourishing and lifestyle integration have helped me move
the focus of the Capstone Project from “work-life balance,” which, during my investigations, has been shown to be an outdated term, to that of integration of core values into a flourishing life. In an article in Forbes, author Efron argued that the concept of work-life balance is dead, and that, in today’s technology connected world, you can no longer draw a line between work and the rest of life. You need to figure out how to “balance and integrate everything you need and want to do each day, week, month and year. This includes making a living, time with your family, friends, plus time for you and time for anything else you want to accomplish” (Efron, 2015). Therefore, I moved from the past perspective of “work-life balance,” to “lifestyle integration” which is more inclusive of the many different roles and life domains people occupy, utilizes the interconnectedness of those roles, and works with the desire to find a way to achieve a feeling of centeredness during all the various activities of life.

One important focus in the field of positive psychology is the study of happiness, which is part of the construction of a flourishing life. The current study of happiness was born from older perspectives on the concept. Human flourishing researcher and coach Andy Cope examines, on his training site, “Art of Being Brilliant,” one early investigation into happiness from Peter Warr (University of Sheffield): Warr’s Circumplex model research (Cope, 2016, p. 15). The Circumplex model orients feelings around the axis of activation and pleasure, with quadrants of anxiety, enthusiasm, comfort, and depression (Cope, 2016). While this model is useful when looking at goals setting, it has since been grown out of as the dynamics of happiness turn out to be more complex and fluid than mapping into quadrants can account for.

Another early leader in positive psychology researcher is Dr. Boniwell, who offered one of the first easily-available introductions to positive psychology in her book Positive Psychology in a Nutshell: The Science of Happiness (Boniwell, 2012). In it, Boniwell “offers an overview of
the science of optimal functioning and well-being” (Boniwell, 2012), and provided positive psychology tools to apply to the creation of a flourishing life-state. Many of these tools, although only five years old, now seem almost old fashioned in the fast-changing world of positive psychology, however they led the charge on what other positive researchers would find in their studies, including the importance of self-knowledge and the ability to recognize self-needs, taking time for reflection and rest, playfulness and, importantly, aligning actions with values (Boniwell, 2012).

In an article in the *Journal of Occupational Science*, Christiansen and Matuska provided insights to the early days and past perspectives of positive psychology, by tracing the history of the concept of lifestyle balance starting with Aristotle, including an in-depth section on “lifestyle balance as time use” (Christiansen & Matuska, 2006, pp. 51-52). The authors then examined healthy lifestyle patterns, and occupational patterns that cause stress. Their definition of lifestyle balance was: “A consistent pattern of occupations that results in reduced stress and improved health and well-being” (Christiansen & Matuska, 2006, p. 50). It was in this article that I first found the argument that “life domains should be construed as containers of meaning” and that the traditional two categories (or domains) of work and non-work was too limiting (Christiansen & Matuska, 2006, p. 52). This was part of shifting my perspective from the older idea of “balance” to the current concept of “integration” of core values into lifestyle.

Another important building block from the earlier days of positive psychology is research into human flourishing by Dr. Brian Little, and, most importantly, Little’s personal projects analysis (PPA) theory (Little, 2006). In his book, *Personal Project Pursuit: Goals, Action, and Human Flourishing*, Dr. Little, an internationally recognized expert scholar and speaker on human personality and well-being ("Dr. Brian R. Little," 2016), examined the internal and external
dynamics of personal goals and projects and demonstrates that human flourishing is enhanced when individuals engage in personal project pursuit (Little, 2006). This was an important early concept to carry forward because, for successful lifestyle integration, time-use must allow for personal goals and projects, which enhance human flourishing.

A final foundational component are the works of Mihaly Csikszentmihalyi, one of the founders of positive psychology. Csikszentmihalyi researched extensively about the state of flow “as our experience of optimal fulfillment and engagement” (Martin E. P. Seligman & Csikszentmihalyi, 2014, p. 266). Flow is an expression of human flourishing, and Csikszentmihalyi explored concepts such as “The Experience of Freedom in Daily Life,” “Flow with Soul,” and “Play and Intrinsic Rewards” (Martin E. P. Seligman & Csikszentmihalyi, 2014), which echo much of the popular literature now being written about finding flow through integrative lifestyle management and time use.

**Current Perspectives on Flourishing and Lifestyle Integration**

Brain research is now adding to the positive psychology research on happiness. In *Brain Rules*, Medina puts forward 12 principles for “surviving and thriving at work, home and school” (Medina, 2014), based on brain science. These principles encourage positive brain health through mindful, and intentionally brain-building, exercises and applications. Medina also provides information about what makes our brains work well and what is harmful to surviving and thriving (Medina, 2014). These principles, exercises and knowledge are powerful additions to consider when exploring lifestyle integration, and human flourishing. The idea that a person can intentionally take steps to lay the groundwork in the brain for positive results in flourishing, is inspiring. It also is a pointer to an idea we will revisit in the future section, that of linking mindfulness to eudemonic well-being.
Another current trend is variations on the idea of examining how your time is spent and creating a personal “hierarchy of needs” (Ibarra, 2015, p. 32). This type of personal inventory is important as knowing what needs should take priority is critical before reconfiguring your schedule and use of time. There are positive psychology tools available to help with this, such as the free PDF toolkit available from the Positive Psychology Program (Pennock & Alberts, 2016). This resource is packed with tools to help evaluate strengths and values, as well as to support the practice of self-compassion and compassion for others. These Positive Psychology Program tools get to the heart of what is central to the construction of an integrative, flow-filled, life, centered around values and purpose. They point the way toward the future of this field, which will further bring the science together with mindfulness, and values together with strategic planning, all in service of the creation of an intentionally fulfilling and well-constructed life.

One element that did not used to be included in the older ideas of human adult well-being, but is now known to be important, is play and playfulness. Dr. Brown’s book, *Play: How It Shapes the Brain, Opens the Imagination, and Invigorates the Soul*, argues that play is the single most significant factor in determining our success and happiness, and that play is a basic biological drive as important to our health as good nutrition and rest (Brown, 2009). Brown supports his assertions with research, and his book provides a scientific basis with which to ground the instinctual feeling that play is essential. Brown’s research shows that play can be highly beneficial in unexpected ways, such as finding solutions to challenging problems while in play-mode, that otherwise might not have appeared. Adding time to play into a personal hierarchy of needs strengthens the orientation of time-allocation toward flourishing because of the benefits play brings, and playfulness itself can be applied to the construction of lifestyle integration, taking the pressure off and giving the experiment of integration space to be a pencil sketch that
can be revised, re-created, and re-imagined in new ways. The importance of playfulness as part of happiness is also highlighted by Dr. Boniwell in her book *Positive Psychology in a Nutshell: The Science of Happiness* (Boniwell, 2012), and by Dr. Seligman, who emphasizes the importance of playfulness and humor as strengths that underpin the elements of measurement in well-being theory (PERMA) (Martin E. P. Seligman, 2013).

Another result from the decade or so of research in the field of positive psychology comes from Steve Moeller who wrote an evidence-based book on endorphinomics that leads the reader through a process for “maximizing your emotional, physical, and financial well-being” (Moeller, 2014). While more of a popular culture book, the professional edition is well cited and researched, including the research of Kennon Sheldon (Sheldon, 2010). Sheldon investigated which emotions cause humans to flourish. That research, as reported by Moeller, found 10 universal psychological needs, and four intrinsically rewarding emotions that underlie flourishing (Moeller, 2014). These universal needs and rewarding emotions are another ingredient into the mix of understanding what an integrative life might feel like, and how a personal needs inventory can be created that supports these needs and rewarding emotions, which, in turn, leads to the construction of a schedule that supports the fulfillment of flourishing-supportive emotions.

One of my favorite terms is “third space,” and I found a new use of the term while doing the Capstone research. Instead of third space being a space that is neither work (or school) or home, but, instead, an informal gathering space in a community, author Fraser uses the term in a different way in his book *The Third Space: Using Life’s Little Transitions to Find Balance and Happiness* (Fraser, 2012). He suggests that a third space is the moment of transition between a first activity and the second that follows it (Fraser, 2012), and that this gap between what you
were doing and what is about to happen, this pause, is a place where balance and happiness are more easily accessible. He uses research, including case studies, to back up his claim that these two to five minute “third space” resets, these mini-breaks, can be an incredibly powerful and valuable tool for finding life balance (Fraser, 2012). This was inspiring to me, as my Capstone stakeholders, to a person, were so incredibly busy that I was having trouble figuring out a way to design the Capstone activity that would offer them reflective time in their day to learn and orient toward their values, but not impose on an already packed schedule. A 5 minute reflective exercise seemed possible, and I then found the 10 Day Inner Values Exercise developed for Executive MBA students at Loyola Marymount University (Manning et al., 2013, pp. 53-57), which is exactly that. It was an excellent match for what I learned from Fraser.

Finally, the “first authored title on applied positive psychology for university courses” ("Applied Positive Psychology | SAGE Publications Inc," 2016) was published in 2014. In this textbook, the latest theory and research in positive psychology is combined with tools to apply it to life. Sections include: “The Mind,” “The Body and the Brain,” “Culture and Societies,” and “Ethical and Reflective Practice” ("Applied Positive Psychology | SAGE Publications Inc," 2016). The intentional practice of positive psychology in a person’s life starts as something micro, and within the person, and then expands outward to the body, then to cultures and societies, influencing not only the individual but, also, the larger, macro world they inhabit. This ties to the desired change for my Capstone participants, for them to gain tools to orient toward personal values and construction of integrated lives, for not only their flourishing, but also in support of their alignment to influence, person by person, integrative flourishing on a larger scale. This is ethical leadership in action: working not only for the betterment of self, but also for society.
Future Perspectives on Flourishing and Lifestyle Integration

The future of research into an integrative, harmonious lifestyle centered around values and supportive of happiness is exciting. I see a path toward a holistic approach of lifestyle integration and human flourishing. In the past decade, the old style hedonistic definition of happiness was replaced with one emphasizing eudemonic well-being, which opened a whole new field of research into “what is this thing called happiness,” and how can it be cultivated, supported, encouraged and nurtured, which is what the scaffolding of integrative lifestyle aims for.

Some members of my Capstone stakeholder-participants are leaders, formally or informally, in the entertainment field. As such, their actions and personal time-use influence their followers. In an article titled “Authentic Leadership and Eudaemonic Well-Being: Understanding Leader-Follower Outcomes” (Ilies, Morgeson, & Nahrgang, 2005), the authors examined authentic leadership and the influence that it had on the followers’ eudemonic well-being. As a future step in leadership training, understanding that, as a leader, figuring out how to live an integrative life, one that supports personal well-being and flourishing, also directly influences followers, may provide additional incentive for the practice of intentionally cultivating an integrative life and well-being. In the “Understanding leader-follower outcomes…” article, mentioned above, eudemonic well-being is said to “closely relate to peak experiences of interest, motivation, and joy that have been observed in artists at work” (Ilies et al., 2005), and it also can be “conceptualized as realizing one’s true potential across one’s lifespan” (Ilies et al., 2005).

Authentic leaders work in the zone of peak experience as much as possible, and scaffold experiences, cultures and processes for followers’ peak experience opportunities as well. Eudemonic well-being of the leader is directly linked to the well-being of the followers. This is a part of the future idea of a holistic view of happiness, and the art of integrative lifestyle
Returning to renowned positive psychology researcher Dr. Boniwell, there is research from 2004 that might prove useful for the future development of ways to look at time use and time management. In a chapter in *Positive Psychology in Practice* (Boniwell & Zimbardo, 2004), Boniwell and fellow researcher Zimbardo investigate a balanced temporal, or time, perspective, and show how essential this is to psychological well-being. They write that a balanced time perspective “is the state and the ongoing process of being able to switch flexibly among these time frames [past, present and future] as most appropriate to the demands of the current behavioral settings” (Boniwell & Zimbardo, 2004, p. 165). They provide a tool, the Zimbardo Time Perspective Inventory (ZTPI), which is a scale for determining how often one lives in the states of: Future, Past-Positive, Past-Negative, Present-Hedonistic, and Present-Fatalistic (Boniwell & Zimbardo, 2004). Figuring out which states predominate in one’s life, then allows for correction and balance of temporal states, with the goal of being able to be flexible with the states as circumstances require. What is of interest to me is that there is not a “Present” state, one that is simply being and not in some form of “present-attached to something else” state. I am curious if an arrival in a “true present” state is possible in the moments of switching states, perhaps in something like the third space pause gaps that Fraser discusses (Fraser, 2012). In the future, I think that scaffolding time management will include the awareness that it is important not only how one is using the time, nor only what the time is being applied to, but also the mind-state involved during the activity.

A last element to add to the future discussion, and one that leads to multiple questions, is the work of Fredrickson and Losada, in their article “Positive Affect and the Complex Dynamics of Human Flourishing” (Fredrickson & Losada, 2005). In this article the authors examine
flourishing, living “within an optimal range of human functioning, one that connotes goodness, generativity, growth, and resilience” (Fredrickson & Losada, 2005, p. 678). The contrasted state is languishing. The authors propose the mean ratio of positive to negative affect is 2.9 for flourishing individuals, and present studies that support this. Knowing that there is a mathematical ratio of positive to negative to aim for to support flourishing, further underscores the possibilities in intentionally scaffolding a lifestyle that supports well-being. In addition, the authors explain the Broaden-and-Build Theory which says that positive emotions “widen the array of thoughts and actions called forth (e.g., play, explore), facilitating generativity and behavioral flexibility” (Fredrickson & Losada, 2005, p. 2). This points again toward the importance of flow and flexibility, and how positive emotions enable a more fluid adaptation to the needs of shifting circumstances. It asks the question then, if a rigid time management approach is supportive of well-being, or if there is a way to build a time management system for oneself that incorporates room for flexible adaptation and flow states, and yet allows on to stay on schedule. In a statement that reminds me of Bohm’s emergent states, and his idea of adaptive wholeness (Bohm, 2009), the authors state that flourishing “is associated with dynamics that are nonrepetitive, innovative, highly flexible, and dynamically stable” (Fredrickson & Losada, 2005, p. 10). That is an excellent description of what type of an integrative lifestyle time-management scaffolding needs to support.

**Stakeholder Perspectives on Flourishing and Lifestyle Integration**

Because I was unemployed and without an organization, the Capstone stakeholder-participants were not part of a single organization. Rather, the common denominator was their connection with me. The original Capstone participant group members belonged to the entertainment business, and then the participants pool opened to any adults that I knew from a
variety of various industries. In the responses received from participants, there was a universal desire to not be involved in the formulation of the research project, development of content or method, or to be involved in any substantive way until the 10-day action research period. The participants expressed not wanting agency, and wanted a pre-created process that was easy to put into their lives, and that would not take up much time. Examples of text and email responses included: “Not now but yes later if a week [sic] & easy,” “Maybe once it gets going?!,” ‘Get back 2 me when go [sic]”, “Sorry. Too much going on” (H. Adams, personal communication, January-February 2016). Thus, it was not possible to answer what the participants’ views were on lifestyle integration, and possible solutions to this challenge. This, not without irony, proved the need for this integrative lifestyle work with them.

Humans are gloriously unpredictable, and this wrinkle is part of my Capstone project story. Collaboration requires flexibility and adaptation, both from a group and individuals. In the Wilder Foundation’s book Collaboration: What Makes It Work, flexibility and adaptability are two of the factors related to process and structure (Mattessich, Murray-Close, Monsey, & Wilder Research Center, 2001, pp. 18-25). For the Capstone, I needed to adapt to this set of participants’ needs and levels of willingness of participation, especially since they requested that I not increase their stress or add too much challenge to their already heavy work load. I continued to compassionately listen to the needs expressed, and responded accordingly, using the participants’ preferred methods of communication including text, email and social media messaging, as to not further overwhelm or add overload to the participants’ busy lives.

I did want to make sure that the participants shared “a stake in both process and outcome” (Mattessich et al., 2001, p. 18), which is difficult when they refused to join in prior to the applied research exercise. However, in this case, their “stake” occurred in the exercise itself, their shared
responses through surveys and exit interviews, and perhaps will continue as well, if the core values discovered and applied have a positive change in their flourishing. The takeaway for participants may include a sort of retroactive collaborative ownership of core value knowledge and application to integrated lifestyles.

Conclusion

The most important sources for my literature review represented turning points, or discoveries, in my journey of understanding my Capstone Project. Here are the most important sources, with notes on how the literature affected my understanding of the issue of integrating core values into time use, as part of constructing a flourishing life:

1. The paper from which my solution will be taken (Manning et al., 2013): “The 10 Day Inner Values Exercise” developed for Executive MBA students at Loyola Marymount University (Manning et al., 2013, pp. 53-57).
2. Efron’s article that argued that the term work-life balance is dead, and moved my focus from balance to the idea of lifestyle integration (Efron, 2015), and opened up my research toward interconnectedness, and multiple life domains and roles.
3. Christiansen and Matuska’s research (Christiansen & Matuska, 2006) further deepened the idea that life domains are “containers of meaning” and the traditional two categories (work and life) are too limiting (Christiansen & Matuska, 2006, p. 52).
4. Several articles and publications spoke of the move from hedonistic well-being to eudemonic well-being. Stephen Joseph’s “Applied Positive Psychology 10 Years On” (Joseph, 2015) was a primary source of this understanding for me.
5. Fraser’s new use of the term “third space,” and his idea that the moment of transition from one activity to another is a pause in which one can find balance (Fraser, 2012).
This idea inspired me to talk with CLU Capstone Advisor Dr. Ward about how to make small, micro changes with my over-scheduled Capstone participants, which can fit into a series of 5 minute reflections with purpose.

6. From the article, “Authentic Leadership and eudaemonic well-being: Understanding leader-follower outcomes” (Ilies et al., 2005), I realized that these micro changes of values-driven time orientation and use by those in leadership positions, resulting from small moments of personal reflection on their values, could directly, positively affect their followers.

The literature I studied showed me that human flourishing has many variations to it, all supportive of living within “an optimal range of human functioning” (Fredrickson & Losada, 2005). Core values are a central component to many, if not most, of the paths studied that guide one toward flourishing in life. The literature reframed the issue of core values as a compass for a flourishing, thriving life as even more critical than I had originally thought. Aligning values and purpose can have large ripple effects of positive change, even if the activity that started the process moving seemed small, and the original change, that of understanding one’s core values, micro in scale. The micro change of understanding core values could be the instigating incident toward not only time management and lifestyle integration, but also toward increasing the experience of the flow state, the “experience of optimal fulfillment and engagement” (Martin E. P. Seligman & Csikszentmihalyi, 2014).
CHAPTER 3 - Methods Determined with Stakeholders

Project Goal Determined by Researcher and Stakeholders

The project goal for my Capstone project was to study if reflection upon core values, and time-use alignment with those values, could aid in lifestyle integration supportive of the state of flourishing. As discussed earlier, the stakeholder-participants in my Capstone Project did not wish to participate prior to the two-week research time. Starting with the first set of possible participants I reached out to, they reported being too busy, and wanted a “plug and play” type of experience where they could join in the 10 days of research, and not be a part of designing or preparing for it. They also did not wish to spend much time in those 10 days to participate in the research (See Appendix B). This might be, in part, because this was a virtual community of people, connected electronically but not in physical proximity to each other. They were not a part of an organization, and needed to fit this project into their already packed schedules. Through their non-participation pleas, they affected my choices and research design as much, or more than, if they had jumped into the process prior to the 10-day period of action research.

Project Methods Determined by Researcher and Stakeholders

Realizing that whatever research I planned would need to be online accessible, short duration, and easy to achieve for the participants, I designed a virtual action research project utilizing a webpage hub, surveys, optional video exit interviews, and participatory exercises that would not take more than 5-10 minutes per day. Figuring out what core values based change might be achievable in this type of frame was assisted by a conversation with Capstone Advisor Dr. Ward in May 2016. In this conversation. Dr. Ward introduced the idea of micro change being appropriate for the Capstone, as well as identifying measurement methods that might be possible for the over-busy participants to succeed in responding to. This led me to search for an
appropriate research model supportive of micro changes around core value understanding. I found such a model in “The 10 Day Inner Values Exercise” developed for Executive MBA students at Loyola Marymount University (Manning et al., 2013, pp. 53-57), which I adapted for the 10-day Capstone exercise (See Appendix E). The exercise took 5 minutes a day, which was a do-able amount of time for the potential Capstone participants. In addition, I arrived at the decision to use surveys at the top and end of the 10-day period as a non-time taxing, participant-appropriate, way to collect data.

Another wrinkle that appeared was in February 2017, when CLU Change class professor Dr. Lauren Moulton-Beaudry, recommended that I branch out from entertainment industry professionals to include any adults I was connected to that might like to participate. This was to expand the pool and broaden the reach to people in other industries. I did not realize until the conversation with Dr. Lauren Moulton-Beaudry that the participants could be from multiple types of industries as I had created the entertainment business grouping to substitute for the type of homogeny of business practice found in an organization. I incorporated this new directive in late April 2017 when I initiated a recruitment push, through text, email, and social media (See Appendix B.). This initiative successfully gathered 18 geographically widespread participants.

**Virtual Action Research Projects (VARPs).** Because this Capstone project was being implemented virtually, I came to use the term Virtual Action Research Project (VARP) to describe the type of action research I was engaged with. The central hub of communication was a webpage on my personal website (See Appendix F) which contained, or linked to, information, surveys, documents, and my contact information, so that participants could easily go online to a single location for one-stop research participation. The materials submitted by the participants were submitted directly to me, and thus not viewable by anyone other than myself and the
participant submitting the materials. The sharing of findings with the participants also occurred on this main webpage hub. This virtual implementation was supportive of the widespread geographical location of participants, a need for self-standing, easy-to-understand instructions, and an ability for people with different amounts of computer savvy, and using different technology tools and platforms, to be able to successfully participate.

VARPs have unique characteristics, tendencies and needs, and are a relatively new phenomenon, born from an approximately 25-year experimentation with a variety of kinds of implementation of online technology into action research. The term “virtual,” instead of online, includes the use of video, virtual rooms, worlds and environments, as well as more traditional online resources such as social media and websites. Technology is now approaching a point where interactivity can occur supportive of individual and group engagement reminiscent of, as well differently than, traditional action research inquiries. For this Capstone, I used a variety of online technology to create the design of the distributed information and webpage hub, and to implement the related activities (See Appendix G).

Like 100% real-world action research, VARPs engage either individuals (not in group form), a group, or multiple groups in research that steps through phases of design, recruitment, implementation, and measurement, with various degrees of online involvement in each. In addition, participants may be engaged at any part of the process, and may interface with the online environment in a multitude of different ways, including different ways within one project. VARPs also have a special feature: they may be synchronous or asynchronous, or, in some cases, both (Bradbury, 2015, p. 532). My VARP is almost 100% online through all the phases, except the participants completed the individualized action research off-line, in the real world, and then returned to the webpage hub to re-engage online.
VARPs may include goals that exist because of the “virtual” part of the research, including figuring out how to connect and engage participants who may not be geographically near the researcher or each other, using technology and tools effectively in support of the project, and pushing boundaries of methods to connect participants (See Appendices G and H). In addition, measurement methods may include adaptations of traditional forms (such as online surveys and video interviews), and new virtual measurement inventions. For my project, I used a webpage as the hub (See Appendix F), with adaptations of traditional measurement methods (See Appendix G). This way, there was only a need for basic computer and internet ability, and the measurement methods (surveys and video exit interviews) were borrowed from what might feel familiar from more traditional research projects, which encouraged and supported participation.

**Project Measurements Determined by Researcher and Stakeholders**

Surveys were chosen as the primary method of measurement at the beginning and end of the 10-day research period because they fit into the participants’ busy lives, and were a way to quickly and easily collect data (See Appendix H). Surveys are recommended when you “need to quickly and/or easily get…information from people in a non-threatening way” ("Basic Guide to Program Evaluation (Including Outcome Evaluation)," 2017) and my Capstone’s data collection fit into that category. The survey questions were chosen to determine the difference in the incorporation of core values into participants’ lives before and after the project, to assess what, if any, change in values-orientation had occurred in the participants’ upcoming schedules, and to measure knowledge of their core values as reported in the pre -and post-surveys. The other method of assessment was optional participation in a 10-15-minute video interview at the end of the research. This allowed willing participants to share with greater depth their experiences and journey through the 10 days of core value reflection (See Appendix H).
CHAPTER 4 - Results: Evidence of Change through Project Implementation

Actions Taken by Researcher and Stakeholders

As mentioned previously, my stakeholder-participants did not wish to be involved in the design or preparation for the project. When I reached out to potential participants, the responses received indicated a universal desire not to be involved in any substantive way until the 10-day action research, reflective-exercise, period. The participants wanted a process that was easy to access, understand, implement and fit into their busy lives. It was critical that every step required as little time and effort as possible, and still have the potential for encouraging positive core-values based change. Because of this desire to wait until right before the 10-day research period to join in, I stopped pushing for early participation in design of the survey questions, reflective exercises, overall implementation process, or early agreement for joining the project.

It was mid-April 2017, about two weeks before the start of the 10-day research period, when, guided by the potential participants’ desire to sign up close to the time of action, I initiated my primary social media and personal email campaign to recruit Capstone participants, which proved successful. In all communications, I included a link to the action research project hub page on my website (See Appendix F), which I built in late March and early April, prior to the recruitment push. When a person considered participation, they went to the hub, signed up using a simple contact form, and then participated by followed a series of steps, which had due by dates as well as links to relevant information. An example of this type of linked information was in Step 5, which connected to a PDF of instructions for the 10-days of reflective exercises (See Appendix E). The Preliminary and Post-Surveys (See Appendix H) were also on this hub page. The only time a participant had to navigate away from the hub to complete an online activity was to sign the Privacy Letter, which was completed through the online document signing service.
HelloSign. The participants did not have to download a document, or need the ability to scan. Everything was contained at HelloSign.com, which made it as easy a solution as I could find for this part of the process.

The steps for the participants once they navigated to the hub were:

Before May 1:

Step 1: Contact Form sign up

Step 2: Privacy Letter signing

Step 3: Optional Core Values Worksheet (Appendix D)

Step 4: Preliminary Survey

May 1-10:

Step 5: Action Research (core values reflective exercises). This was completed by the participants offline, following the PDF instructions (Appendix E)

Step 6: Post-Survey (May 15, 2017 deadline for completion)

Optional video exit interviews were scheduled May 8, and conducted May 10-15. On May 21, 2017, the data was made available to the participants on the same webpage hub, reconfigured and password protected.

I received forms, survey responses and signed Privacy Letters into my inbox, making collection of data and supporting documents relatively easy. Please refer to Appendix G for a list of the online services used to complete this virtual Capstone. There was some chasing of errant emails that went into spam, and one survey response never showed up and had to be redone, but overall the receiving part went smoothly. A virtual project does require some nudging and reminding because the participants and I were never in a real room together, which is where much of effective communication regarding deadlines will often occur. Instead, I sent the
following emails: A pre-day-one welcome, a mid-way thank you and encouragement note, a doodle (a free online meeting poll service) link for scheduling of optional video exit interviews with those who expressed interest, an end of day-10 thank you and reminder to complete the Post-Survey, two sets of individualized nudges for Pre-and Post-Survey completion, and a final email inviting participants to the hub webpage to view and respond to the data.

**Measurements of Results**

In the charts below, the number of participants who completed each of the Capstone activities is shown, as well as percentage of participant engagement in each component of the virtual action research project (VARP), and percentage of each component’s online presence.
As you see, the participants’ engagement decreased during the approximately 15-day activity period, however the percentage of those who fully participated in all required activities was a healthy 72.22%. Also, as mentioned earlier, the potential participants reached out to prior to the end of April 2017, did not wish to be a part of the design or implementation of the project due to heavy time constraints and very busy schedules. This is reflected in the second chart, above. Another note on this same chart is that the “Participants Completing All Non-Optional Activities” was not 100% online because the participants completed the 10-day reflective exercise in the “real” world, before reporting back to the webpage hub for the Post-Survey.

Tables 1 and 2, below, are distillations of change reported via the surveys and video interviews. I edited for brevity and clarity, but kept the participants’ responses accurate. I used Youtube’s free transcription service for the video interviews, and then cleaned up the transcriptions by re-listening to sections that I was using, along with notes I took during the conversations. In addition, I was interested in what the participants listed as their core values in the Pre-and Post-Surveys, and I looked at the changes from Preliminary to Post-Surveys as reported by several people (noted in the table below). Please see Appendix I for two charts that show the pre-and post-core values as reported from the surveys.
Table 1

*Core Values Related Change P1 – P13*

<table>
<thead>
<tr>
<th>Identifier</th>
<th>Core Values</th>
<th>CHANGE related to the question: To what extent do you incorporate your core values into how you use your time? (Responses edited for space and clarity)</th>
</tr>
</thead>
<tbody>
<tr>
<td>P1</td>
<td>Creativity, Spirituality, Influence</td>
<td>I am now more aware that I need to focus on this and be aware that the things that are important to me are primary in my life. I am trying now to read every morning at least one half hour materials that will reinforce my values. I am also taking some time every day to meditate and visualize myself in my life doing what is important to me. The other important change that has helped me incorporate them into my life is to try every day to do one thing that will reflect these values.</td>
</tr>
<tr>
<td>P5</td>
<td>Influence, Responsibility Creativity</td>
<td>To a large extent, they are sitting much more at the forefront of my thinking. Less a change in &quot;understanding&quot; as much as a much greater consciousness of them in my day to day thinking and actions.</td>
</tr>
<tr>
<td>P6</td>
<td>Spirituality, Community, Health</td>
<td>I need to incorporate reflection more consistently and more deeply - sometimes values stay too much at a superficial level.</td>
</tr>
<tr>
<td>P7</td>
<td>Love, Creativity, Wisdom</td>
<td>Meditating and writing helped me to break through some inertia around creativity. I would like to begin writing every day, and I feel like this study helped me to begin to do that. Now it doesn't feel as daunting. It feels doable. It helped me reconnect to my meditation practice.</td>
</tr>
<tr>
<td>P8</td>
<td>Family, Helping Others Joy</td>
<td>Video Interview: “The biggest takeaway …is like the difference in the way some of my life’s decisions are happening, like reorganizing with the values. It’s giving me a sense of confidence especially around the big decisions.”</td>
</tr>
<tr>
<td>P9</td>
<td>Be Nurturing, Open-minded and Positive</td>
<td>I tried to do this activity the beginning of every day to help &quot;set&quot; the tone of my day. I have noticed that as I nurture my relationships I have been more generous with my time and donations. Every day as I did this activity, my family would pop to mind first. I realize that I needed to praise my kids more as I see them demonstrate core values.</td>
</tr>
<tr>
<td>P10</td>
<td>Pre: Family, Justice, Fairness Post: Family, Justice, Truth</td>
<td>Faced with the prospect of thinking about what my values are at a given time of day re-enforced the centrality of them to me. Video Interview: “The biggest takeaway I had was like I don’t give these things [core values] a lot of thought and it was interesting to think about them…I don’t do a lot of changing… I’ve always kind of been trapped by my values…they keep me doing what I should but sometimes I’d like to do something else like run off to Belize for several months but I can’t, you know? My values keep me honest.”</td>
</tr>
<tr>
<td>P13</td>
<td>Adventure, Balance, Change &amp; Variation</td>
<td>Probably about 35% [incorporation of values into P13’s life]. I have become more aware of how I am not finding much adventure or balance right now in my life... How do you flourish in today's world? That's a good question.</td>
</tr>
</tbody>
</table>
Table 2

*Core Values Related Change P14 – P19*

<table>
<thead>
<tr>
<th>Identifier</th>
<th>Core Values</th>
<th>CHANGE related to the question: To what extent do you incorporate your core values into how you use your time? (Responses edited for space and clarity)</th>
</tr>
</thead>
<tbody>
<tr>
<td>P14</td>
<td>Pre: Family, Truth, Justice Post: Justice, Mercy, Grace</td>
<td>Video Interview: P14 talked about incorporating core values into their job: “I deal with people. I am a front desk coordinator for a vet clinic. Every day I have to present sometimes difficult options to families who want to care as best they can for their four legged friends…It is difficult to present hard truths to families who are of low means. Sometimes it means having to do the unpopular thing and help them to rehome their family members.”</td>
</tr>
<tr>
<td>P15</td>
<td>A purpose filled life, Only allowing positivity around me, Empathy</td>
<td>This study reminded me of that fact that that many of us are committed to many things; it is being committed to action that is often lacking. I appreciate the chance to be part of this study which helped remind me that I have fallen lazy and need to get back to making a difference not only by my simply being on the planet as an example, but to actually set up some action points and to follow through on them.</td>
</tr>
<tr>
<td>P16</td>
<td>Pre: Integrity, Aesthetics, Humor Post: Honesty, Competence, Work/Life Balance</td>
<td>P 16 reported from a leadership perspective: It is very important to have (and as a leader) to facilitate a trustworthy and safe work environment. It means that you have to make a comfortable work place where you are able to be 100% honest with your colleagues and also where humour is to be found…We could be better at offering courses to employees and ourselves in the management to make all our staff (including myself) more competent…In the managing of the theatre we have become very aware the last couple of years, that there has to be a good work/life balance for everybody…It gives back more efficient and happy co-workers. It has been a good exercise in remembering what the core values are.</td>
</tr>
<tr>
<td>P17</td>
<td>Spirituality, Integrity, Family</td>
<td>Video Interview: “…it has been really helpful for me…with everything I’ve been going through my mind is just getting full and spins and then I go ‘oh what are my top three,’ …I made myself think, ‘okay, if those are your top three values, where are you going to go right now.’”</td>
</tr>
<tr>
<td>P18</td>
<td>Balance, Compassion, Responsibility</td>
<td>Video Interview: “This has made me more aware that these are the values I prioritize. It has helped me understand my actions better.”</td>
</tr>
<tr>
<td>P19</td>
<td>Compassion, Enjoyment, Humor</td>
<td>Although P19 shared on the Preliminary Survey that, “I try to incorporate my core values in my everyday activities and interactions with others. My core values are something I seem to do naturally,” they then reported, in the Post-Survey, times when they were not able to “do” core values as easily: “I noticed that when I am going through some difficult thought processes or significant life changes, my core values can be more difficult to implement. During those times, it takes some effort to maintain life values.”</td>
</tr>
</tbody>
</table>
Communication of Results to Stakeholders

The communication of results of the Capstone data was shared with the stakeholder-participants on May 21, 2017. I re-designed the webpage hub to share the results, and added a password protection to the page. I sent an email to my participants with the link to the page and password. The data shared included the charts in this chapter, the two core values (Appendix I) charts, and answers to the Preliminary and Post-Surveys, with a focus on reported insights about values, and changes in behavior. Identifiers in the information, such as a mother being in hospice, were removed to further anonymize the results. The participants were encouraged to email me with reflections on the data, trends they might perceive, and any other responses about the project they wished to share. No participants responded, which was consistent with earlier challenges in obtaining participation buy-in. The non-response re-confirmed the desire of participants to engage in a limited time, “plug and play,” type of way. To obtain participant response to data for future studies, I would recommend designing the project to reward participants for their feedback. Also, employing an email program that tracks which participants click through to the data using the link provided would enable the researcher to follow-up with those individuals who viewed the data but did not respond.

Assessment of Goal Achievement

The determination of core values based change was assessed, by me and the participants, through reflection on the exercises, survey results and interviews. I looked for differences in core value understanding that resulted in actions about life-integration of those values. This is a tricky thing to measure. As P5 put it, it felt like there has been a change that is hard to put into words, not a “ninety-degree” change, but one nonetheless (Video Interview, May 11, 2017).
Quite a few participants had insights about their core values during the 10-day exercise, which allowed them to contextualize past and present decision making in ways that reduced stress and empowered them. An example of an insight around a core value change came from P10, who, in the video interview, talked about the change from the value of fairness to that of truth: “In the middle of the week I started thinking that fairness and justice were the same thing, or close for me, so if I had to put it another way, truth is a really important core value for me and not redundant” (Video Interview, May 10, 2017). An example of a new understanding about a value came from P5 for whom the word “creativity” was always “airy-fairy,” and not concretized in action. When P5 instead saw creativity as a way to problem solve and strategize, they excitedly adopted it as one of their own core values – something they never would have considered doing before (Video Interview, May 11, 2017). P8 offered another type of core-value understanding, when they said, “I had hesitation claiming my values…This project started that question [about core values] circulating and I brought that into another workshop…asking others about it…It was hard, I was resisting …I was able to pick them later in the week” (Video Interview, May 15, 2017). This trend of discovery and deepening awareness of core values was not the primary goal of change, but was a positive effect of the reflective exercises, and one that fed into the participants’ abilities to engage in the primary goal, that of a core values-based time use change. Values awareness may also continue, leading to future positive benefits based on greater values-orientation.

Some of the concretized core values-based changes reported in surveys and interviews included: Restarting meditation, writing daily and that being inspiring to now include writing in life, stress-caused hives disappearing due to using the core values as calming “touchstones,” making a decision to re-orient a day’s schedule around values-based activities, and a well-
thought out application of personal core values to theatrical leadership. This last change, while not yet concretized in specific action, showed the leader’s awareness of the challenges and needs in the company they run, and potential for solving some of those needs through values awareness and orientation.

One of the participants who demonstrated several concrete changes was P17. This participant shared, in the video interview, the story of a decision during the core values 10-day experience, when, driving to one of several scheduled appointments, this participant realized that what they really wanted to do was spend time with their mother, who is in hospice. While normally they would “should” themselves and keep going with the scheduled day, bringing their core values to mind they realized that they could cancel the appointments, and, in alignment with their value of family, go to their mom. P17 reported that it was the right decision to make, and made them feel much less stressful. Also, this participant shared in the video interview that their stress-induced hives disappeared after one week of using their three core values as grounding, centering “touchstones.” Their therapist was amazed as they’d been working to eliminate the hives “for months.” P17 also contributed one of my favorite responses:

I have become much more mindful of not only my top core values, but also of the others on the list. This weekend my family and I talked about the list of values and which ones guided our days. It was a precious conversation and helped us understand one another.

The conversation led to being more mindful of our own values and also to respecting others. (Post-Survey, May 15, 2017)

This sharing of a core values based conversation with family is a concretized change, the result of an action scheduled into a week intentionally building on and orienting to a participant’s core values, toward greater integration of those values in that family’s collective, flourishing life.
CHAPTER 5 - Final Reflections and Recommendations

Overall Project Summary

This Capstone project focused on supporting increased states of flourishing for the participants through greater life integration of core-values. The Capstone’s desired change was for the participants to use a 10-day reflective exercise to deepen their understanding of their core values, and their time use around those values, and then, in the week following the research, to make one change in time use toward more values inclusion in their lives. Nine of the fourteen participants who fully engaged with activities reported concrete time-use changes that deepened their values integration into time use, and all fourteen expressed discovery or deepening of their knowledge of their core values, with three changing one or more of those values, based on pre- and post-survey responses, during the 10-day period.

The Capstone participants were originally intended to be entertainment industry professionals who are in leadership positions. However, to expand participation and depth of response, the pool of people evolved to include any adult connected to me, no matter what industry or profession with which they were involved. Because I was unemployed and without an organization for the time of the Capstone, the participants were not part of a single organization, and were widespread geographically. To make this project work virtually, I connected with the participants using social media, email, video chat, and a webpage hub.

My core values of happiness and integrity, long neglected and recently, intentionally, reclaimed, guided this project. My desire was for my Capstone participants to use this 10-day journey as a time to both deepen awareness of their values and make a related time-use change. I recognized how important and how challenging this values-based work is, and I also wished, through this art-of-life practice, for the participants to engage in the development of self-
compassion. Dr. Jinpa, in *A Fearless Heart*, writes that “cultivating self-compassion…[is a] replenishing [of] a well-spring of kindness and compassion that lies within…it’s like recharging our inner battery so we have more kindness and compassion to draw from others” (Jinpa, 2015, p. 40). Warm-heartedness is brought about in part because of development of compassion (His Holiness the Dalai Lama, 2013), which in turn creates "the conditions for our own happiness" (Dell'Olio & Simon, 2010, p. 461). Happiness optimizes a person’s ability to align their life with purpose and contribute to the world in a way unique to them. Acting in this way - with purposeful alignment - is courageous, and is important for me to practice, both in role as an ethical leader and in everyday life. It is also this hope for values-driven action that guided the construction of this project on behalf of my participants.

**Consistency of Guiding Values**

From the beginning of the conception of this Capstone project, I had in my heart the wish for the participants to be encouraged to find and “live” what was most important to them. My guiding values of happiness and integrity had been severely neglected for years as I placed others’ needs consistently above my own, and the demands of work and caretaking before self-care. It was a hard-won lesson, to arrive at an understanding of how far removed I had become from what was most important to me, and an even more difficult experience committing to action to correct the problem. Interestingly, once the decision was made to act, in this case to resign from a toxic workplace, I felt a sense of peace and power, as I realigned with my deeper, core-values based “self.” Through this I learned the truth that, “Acting out of compassion for ourselves, we can be confident that we are doing the right thing” (Jinpa, 2015, p. 53).

When I reached out to possible participants for this Capstone, and, to a person, the responses were variations on being too busy to commit to engaging in the action research prior to the 10-
days of reflective exercises, my feeling was one of compassion. I understood exactly where these potential participants were coming from, and how overwhelmed many of them seemed by the competing demands of life. However, the application of this knowledge of “overwhelm,” required multiple pivots and adjustments as I worked with advisors to figure out how to construct a project supportive of people not in a room together, and for whom time and energy were scarce resources. The Golden Rule of doing to others as you would have done to yourself is in play here, because I knew how it felt to not know how one more item might be fit into a week’s schedule. I did not want to further burden my participants, or add to their stress, while I attempted to provide an opportunity for core-values reflection and alignment. This proved challenging, and there were multiple times when I felt my core value of happiness eroding, as I struggled to meet deadlines and fulfill requirements needed to construct an online model of research appropriate for a very busy group of geographically spread out participant group. When I, in the process, lost “happiness,” then I also lost “integrity,” because, for me, integrity is about keeping the core values at the center of life. The corrective idea that helped me re-center came from John Maxwell, who writes about the importance of “crucible moments” for leaders, when circumstances force change, creating teachable moments, through which we grow and learn (Maxwell, 2013, pp. 144-145). Creating and implementing this Capstone project was one large crucible moment, with many smaller “crucibles,” within. This was not only beneficial for me, but also as “material to help the next generation of leaders lead,” (Maxwell, 2013, p. 144) through the sharing of discoveries and breakthroughs in my Capstone story.

When I constructed the website hub, I kept in mind that people needed all the Capstone project’s information in that one location, links needed to be easy to open, and processes had to be simple to achieve, no matter what type of computer, or technical knowledge the participant
had. I always kept at forefront of my mind the question of how a participant would be interfacing with the project, with the individual steps, the information presented, and with the amount of response requested. Because of the high level of successful participation, I feel that I achieved a compassionate, virtual design that provided easy-to-use pathways and communication channels which were respectful of participants’ busy lives and desire for as close as possible to a one-stop-shopping type of virtual action research project.

**Project Impact on the Researcher**

During the 10-days when the Capstone participants were involved in the core-values exercise, I had an experience of wonder and curiosity about what they might be discovering and learning, if anything, as they participated. Because the participants were not in a room with me, and there were pre-and post-survey questions but nothing responsive in the middle – intentionally supporting the need for easy life-integration of the exercise – there was a stretch of time during which I heard very little from any of the 16 or so who had embarked on the journey. During this time, I created a meditation which was grounded in gratitude for the participants. After centering myself by imagining the participants, who were widespread in the United States and Scandinavia, I then sent each a wish for them to experience core-values knowledge as appropriate for what they needed for their happiness and well-being. This was followed by an imagining of them happy in the world, living aligned with purpose and joy, fully engaged in a powerful, flourishing life. I found this mediation to be incredibly uplifting for me. If I felt at all depressed or anxious, when I sat down and used this Capstone participant meditation, I would arrive to a place of exuberance by the end of the meditation. It happened each time, with my heart opening, reaching outside of myself, perhaps arriving at something close to the “heart trembling” known as *anukampa* in the ancient Buddhist texts, which is translated as a heart
“literally moved by caring” (Jinpa, 2015, p. 114). In this way, my Capstone participants not only gifted me their participation in the research, but also provided me with an opportunity for a formal mindful practice. In addition, the construction of the Capstone project was, in itself, an applied mindfulness exercise. Mindfulness, according to Jon Kabat-Zinn, “shows you new ways to enhance and optimize both your effectiveness and enthusiasm for your work, ways that feed your innate creativity and fulfill your need for satisfying human relationships based on authenticity and good will” (Kabat-Zinn, 2012, p. 120). The Capstone experience has supported me seeing these “new ways,” through “deep reflection and ongoing cultivation through practice and experimentation,” which I believe “can transform our world in ways little and big” (Kabat-Zinn, 2012, p. 120).

Dialogue in a mostly virtual environment has challenges. Because the participants and I were never in a room together, I had to rely on recruiting and communicating through text, email and messaging on social media. In some ways, this is an immediate form of connection, especially on social media message boards, but, in other ways, there is a sense of sending a message or email off into a void, not knowing if it will be acknowledged or responded to, without a lot of options for follow-up except to compound upon the problem with additional messages. This required me to utilize a combination of patience and resilience, with some stubbornness too, or determination, depending on how you wish to frame it. Like all dialogue, especially when in a leadership role, I needed to be adaptive and responsive to what was arriving. Except for the video interviews, my “listening” was through written responses, often short-form in text or message syntax. Despite these challenges, my participants and I managed to do a form of conversation that, while perhaps not the Bohm perfect ideal of dialogue, exchanged information and viewpoints with no friction, once the communication channels were opened. Speaking of Bohm, a curious discovery I made
about this virtual form of dialogue is that it allowed me to practice Bohm’s “suspension,” where I could witness my thoughts and reactions to a participant’s responses, for example in a survey, and then pay attention to what was actually written on the paper without the noise of my interpretations (Bohm, 2009, pp. 28-29). I hope to be able to activate and apply this feeling of suspension, now that I am more familiar with it, when next in group verbal dialogue.

One of the factors of effective collaboration is “skilled leadership,” including “organizing and interpersonal skills, and [carrying] out the role with fairness” (Mattessich et al., 2001, p. 10). I feel I successfully accomplished this factor in the leadership of my Capstone, and in its mostly virtual implementation. While my participants did not collaboration directly together, I encouraged the feeling of a group by inclusive language in emails (we, let us, all), and underscored that participating in the collaborative research effort would be to individual’s self-interest, which is a factor encouraged by the Wilder Research Center as positive for successful collaboration (Mattessich et al., 2001, p. 16). Another critical component for collaboration is compromise, and, as the designer and leader of the Capstone, I repeatedly adjusted the project as a compromise to what the participants were willing to try to fit into their lives. Being adaptable, creative, playful, and flexible are necessary leadership tools and traits for collaborative efforts, and they are equally important for virtual efforts as in real-life interactions, and I feel I utilized them effectively. One other important leadership collaborative tool that I deployed was believing in people, and knowing they could succeed. I had to set up a collaborative environment which the participants could navigate without my assistance. This was a form of empowerment, where I helped the participants to “see what they [could] do without my help” and released them to do it (Maxwell, 2013, p. 118).

The Capstone project offered an excellent, intentionally created, opportunity to practice the
creation and sustaining of a process of change, as well as designing a change process to support the solving of a need for others, in a way aligned with my core values and work as an ethical leader. I identified the importance of creating a structure that encouraged transformative moments of core-values understanding and alignment for the Capstone participants, in order to keep the momentum continuing forward from the initial “activation energy…the initial spark needed to catalyze a reaction…to overcome inertia and kick-start a positive habit” (Achor, 2010, pp. 155-156). This activation energy is what fueled the movement through the stage of the Satir model titled “chaos,” and emergence into “integration” of the new core values awareness into, hopefully, the “new status quo” of participants’ lives (Ramakrishnan, 2014). With this focus on encouraging transformation for the participants, I consciously worked to apply these insights and characteristics of successful leadership:

1. People who respond well to change will have a high ‘ambiguity threshold.’
2. Skillful managers of change will have a constructive ‘internal monologue.’
3. Those who deal well with change will have a good reservoir of emotional, physical and mental energy. (Harrison, 2008)

Also, I kept a post-it on my computer as a shortcut to remembering to four things a change leader needs to be able to know, articulate and put into action, to intentionally influence:

1. Vision (what and why)
2. Allies and Advocates (who)
3. Strategy (how and when)
4. Expect Conflict (and the unexpected) (Stanley Ward, 2014, slide 52)

A takeaway from this process is that when we talk of “change,” we really are measuring the results of change, which is what is visible. Change itself is the natural state of potential,
contained in the space between what was and what will be. Leadership needs to encourage the creation of a safe change-supportive space, as well as guide people through this state of flux, where things may be confusing and resistance kicks up. For this virtual process, one participant sent the Preliminary Survey in late, due to what was later reported, in the exit interview, as resistance to choosing values. They said that my “nudge” email to complete the survey was encouraging and not berating, which made the difference between them backing out and going forward. This small moment demonstrates success in leading a participant, virtually, past fear into a change-space.

**Project Impact on the Stakeholders**

From my point of view, the participant-stakeholders grew in their knowledge and understanding of their relationship to their core-values. There was evidence of switching of core values when it was determined that a better word might serve as a container for what was most important for them, such as with P10 who switched between the value of fairness and truth, explaining in the video interview that in the middle of the week “I started thinking that fairness and justice were the same thing, or close for me, so if I had to put it another way, truth is a really important core value for me and not redundant” (Video Interview, May 10, 2017). P16 changed their values from “Integrity, Aesthetics, Humor,” to “Honesty, Competence, Work/Life Balance,” (Pre-and Post-Surveys, May 2017), which seemed to be related to P16’s in-depth reflection in the Post-Survey on the importance of personal core values as a leader to the well-being of their organization.

In addition, the Core Values worksheet was shared by two participants with family and friends, which indicates that the participants felt it was beneficial to themselves and worthwhile to share forward, for the benefit of those they care about. P17 wrote, “This weekend my family
and I talked about the list of values and which ones guided our days. It was a precious conversation and helped us understand one another” (Post-Survey, May 15, 2017).

Multiple participants also reflected upon how decisions made in the past made more sense when seen through the lens of their core values, in a sort of retrospective coherence. P8 was the strongest example of this, and they said that “understanding what I did [with past decisions] before with these values makes it easier to get what I’m doing now” (Video Interview, May 15, 2017). Three participants reported a new or renewed sense of confidence in making large decisions that are in their near future, including P8 mentioned above, with the values as a compass or filter with which to measure how “right” the decisions are for what is more important and aligned with what they feel would be the best expression of self-in-the-world. P10 had a unique perspective on this, saying that their values “keep me doing what I should but sometimes I’d like to do something else like run off to Belize for several months but I can’t, you know? My values keep me honest” (Video Interview, May 10, 2017).

Concrete changes were also demonstrated, with self-care activities, such as meditation and creative writing, started or restarted, and stress-based physical ailments diminishing or disappearing during the application of the reflective exercises. Several participants re-ordered activities in at least one day’s to-do list, to better support their values in action. P17 indicated a great feeling of relief upon doing so. The responses in the Post-Surveys tended toward a more expansive view of how the participants related to their values. For example, instead of it being easy or hard to keep values in mind, there were more nuanced understandings such as the difficulty of applying core-values when a difficult situation arises, or a lack of acknowledging when their children put their core values into action. From P19, “I noticed that when I am going through some difficult thought processes or significant life changes, my core values can be more
difficult to implement. During those times, it takes some effort to maintain life values” (Post-Survey, May 2017). Overall, there was, from every participant, some indication of a deepening of core values understanding, and, for many, concrete changes of a variety of kinds indicating further integration of those values into their lives.

**Overall Project Assessment**

This Capstone project created a core-values focused tool to address the larger issue of people discovering that they are spending time in a way that is not meaningful to them, and wanting to change their time use to include greater meaning and purpose. Based on this project’s findings, this tool, a series of exercises plus instructions, can be deployed in a virtual environment, used independently or with other people, and needs only about five to ten minutes per day to achieve positive results of greater values-oriented time use. This tool is a takeaway from this project that can be brought forward into future “build a flourishing life” research and work.

The strengths of this Capstone project include its adaptability, flexibility, and success (based on positive indicators of change) of the virtual implementation. From the start of the process, I adapted to the needs of potential and then actual participants, including deciding on the short duration of length of participation, the limited time commitment per day to participate, using short surveys, making the video exit interview optional, and making sure that any online activities were kept to as few steps as possible. I also had to be flexible, and willing to let go of early ideas that would have not been able to fit into what was possible virtually, or with a limited overall time frame for implementation. There was also a great deal of trial and error with the tools used online, which I test drove for myself before the creation of the webpage hub. My need to keep expenditure low encouraged creative use of trial periods, free and basic level of apps, and existing technology already in use by me. The extra work paid off, and the virtual
implementation was highly successful, much more so than I thought it might be. While rudimentary in some ways, with a single webpage as the home base, and use of non-fancy tools like the basic level of the survey app, the design with easy to understand steps and built in information including links to PDFs and the Privacy Letter, worked. Most of the participants followed along and fully engaged, and I did not receive a single request for additional explanation of instructions.

Weaknesses of the project include the virtual implementation, the short 10-day duration of the reflective exercises, and a lack of stakeholders collaborating with me for the conception and design phases. The virtual implementation weaknesses are having to do with me learning about tools that can be used for virtual action research projects, and then figuring out how to apply them. Now that I have a better scope of what is available, and can think more effectively in terms of designing interactive steps for participants to self-follow, a more interesting hub page might be able to be created, and additional measurement tools explored as possibilities in an online environment. I also would have liked to have the participants engage with each other, however it was difficult to get them to schedule a single 10-15-minute video interview with me, so that would take additional planning and creative thinking to make occur. Brainstorming with an online interactivity expert, be it via webpage or app, would also be a way to gather ideas, even if they then had to be adapted to a no or low cost approach.

The short 10-day duration of the reflective exercises made it possible for me to recruit participants, however it also limited what was possible to achieve. One solution for fixing this would be to do two, 10-day, segments. One would focus on core-values knowledge and awareness, and the second would be about making concrete changes in time use for greater core values integration. I can envision difficulty in getting people out of part 1 and into part 2, as
completing the Post-Survey for this Capstone took some extra nudging, but there might be a way to “carrot” the participants with some type of incentive. Without cost, it might be an expert donating 30 minutes for a participant-only “interview plus questions” online video conference, or a special positive-psychology tool created for them. I think this solution would need something to get participants to cross the gap between stage 1 and 2, even if stage 2 happened immediately.

A second solution might be to try a 15-day experiment, and then a 20 day, to see where the falling off point is for effective recruitment. 10 days seemed a good length for the people who responded to my early requests for participation with “I’m too busy,” but it might be possible to try for expansion.

The lack of stakeholders collaborating with me for the conception and design phases could be solved simply by me asking more people across a variety of professions. It also could be solved by me reaching out to people who have now completed this first Capstone experiment. For participants who have found benefits from the process, they might be interested in helping make it work more effectively as well as have new ideas about how it might function.

**Recommendations for Future Projects**

This Capstone was a do-it-yourself kind of virtual action research project (VARP) experiment, and has made me think about potential in virtual-room engagement, and ignited a desire to learn about new tools for connectivity and follow up with participants for this type of project. I can imagine a future with a virtual research-based world, a full virtual reality, designed as a place where researchers can meet, dialogue, run applied research experiments, and where participants hang out in informal gathering spaces to share ideas, meet new people, and dream new questions and related research. It could be an exciting online destination where conferences and workshops are held, and where new technologies to support virtual research are test-driven.
For the future, I think that a core-values based reflective exercise project could be carried out on a more robust version of a similar webpage hub, or as a stand-alone app. As an app, there could be exciting additions like stars for days when the reflective exercises are completed, ways to share discoveries with others, possibly even integration into calendar apps so that a “core-values activity” could be scheduled and celebrated. An app would also solve the need for extended practice for deeper levels of integration of values into time use. As a leader, it would be great if there was a way for me to take a note when I successfully use values orientation in my work, especially to navigate thorny situations. This app concept could keep track of that, which would help me visualize progress of values integration and application to my life and work.

Ultimately, aligning with our values and purpose allows our heart to open and connect with the greater world around us. “To use a well-worn metaphor, we are truly wired to connect” (Jinpa, 2015, p. 115). Any future projects related to this Capstone would be guided by this idea that compassion, for self and others, is foundational, and under all positive, beneficial actions. Learning about our values, and pledging to honor them, helps to nurture that compassion into an aliveness of necessary action, born from an urgent need to awaken what is best in ourselves, and in others.
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Appendix A: Ethical Guidelines

April 17, 2017

To Whom It May Concern,

I am doing an action research project about core values, and I am asking you to be a participant in my research.

I will give priority to your interests at all times. To protect your interests in my final report, I promise the following:

- Your identity will be protected at all times in my final report unless you give me specific permission to use your name.
- You are free at any time to withdraw from the research project, whereupon I will destroy all data relating to you. I will report that a participant decided to leave the project, and reflect on ways the project might have been more conducive for all participants.
- I will make a copy of my research report available to you.

Please sign this document. A copy will be available for your download as soon you submit this to HelloSign.

Researcher’s Name: Hilary Adams

Date: April 17, 2017

I have received an ethics statement from Hilary Adams.

Signed ____________________ Date ____________________

NOTE: If at any time you have any questions or concerns about the project, you may contact the Dean of Capstone Studies at Claremont Lincoln University, Dr. Stan Ward. Please contact him by email: sward@claremontlincoln.edu, or call the university: 909-667-4400.
Steps Taken to Ensure the Ethical Treatment of Stakeholders

- Each participant was assigned “P” plus the number that indicated when they signed up. For example, P1, P2 etc.

- Emails sent to the participants were blind cc’d, with only my email visible, and no names were ever given.

- For the Doodle poll (optional exit interview signup), I requested that participants either use only initials or first name on the poll. (Doodle polls are visible to those participating in the poll). If they felt uncomfortable with these options, the participants had the option to skip the poll and respond to me directly through email.

- The Privacy Letter was signed on HelloSign.com, and participants automatically received the opportunity to download the letter once signed. I received a link to the signed letter, which was stored in my password protected account on HelloSign (now deactivated so the letters are not on the HelloSign servers).

- The survey responses came to my inbox and no one else had access to them.

- The webpage was password protected for the sharing of the data to the participants.

- The data shared was stripped of all possible identifiers, such as information indicating location of the participant.

- Video up on Youtube (to take advantage of the transcription services) was kept private viewing only (for me only), and immediately removed once the transcription was completed (less than a day).

- All data (surveys and videos) is stored on a password protected external drive that I hold, and the data will be destroyed once the project is completed.
<table>
<thead>
<tr>
<th>Date</th>
<th>Purpose</th>
<th>Participants</th>
<th>Actions and Outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td>January 2016-</td>
<td>Recruit stakeholder-participants from the entertainment business.</td>
<td>Colleagues who might be interested in the project and participating in the research</td>
<td>Contacted 30 individuals as of 9/4/16 directly via email, text and/or social media messaging. Also, posted general request for participants via social media. As of February 2017: 6 committed Conversation with Lauren Moulton-Beaudry February 2017 to clarify what the change is, and who the participants might be. Participants may now include non-entertainment professionals.</td>
</tr>
<tr>
<td>Current</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1/27/16</td>
<td>Email with Capstone Advisor Dr. Stan Ward</td>
<td>Dr. Ward</td>
<td>Wrote for clarification about how to proceed as I was unemployed and without an organization in which to do the action research. Dr. Ward offered guidance, and we set up a time for a phone call.</td>
</tr>
<tr>
<td>2/8/16</td>
<td>Call with Capstone Advisor Dr. Stan Ward</td>
<td>Dr. Ward</td>
<td>We discussed how to proceed without an organization, and agreed that the group of stakeholder-participants would come from the entertainment business, recruited as individuals.</td>
</tr>
<tr>
<td>5/26/16</td>
<td>Email with Capstone Advisor Dr. Stan Ward</td>
<td>Dr. Ward</td>
<td>Contacted to discuss feedback I received from most possible stakeholder-participants regarding a desire for pre-packaged, easy to implement applied research, and no desire for agency or involvement in its creation. We set up a time for a phone call.</td>
</tr>
<tr>
<td>5/27/16</td>
<td>Call with Capstone Advisor Dr. Stan Ward</td>
<td>Dr. Ward</td>
<td>Discussed the validation of the need for lifestyle balance (focus of the research) by the possible stakeholder-participants because they did not wish to add to their busy lives by early involvement in the research. We investigated on ways to proceed forward.</td>
</tr>
<tr>
<td>8/21/16</td>
<td>Email with Capstone Advisor Dr. Stan Ward</td>
<td>Dr. Ward</td>
<td>Shared a new exercise that I thought would work for the applied research. He asked for clarification, which I provided, and then he agreed that it would work. We also set up time for a phone call.</td>
</tr>
<tr>
<td>8/30/16</td>
<td>Reached out to three “maybes”</td>
<td>Three possible stakeholder-participants</td>
<td>Connected to the three possible stakeholder-participants to see if I could convince them to come onboard. All three said yes.</td>
</tr>
</tbody>
</table>

Appendix B: Stakeholder Collaboration Log
<table>
<thead>
<tr>
<th>Date</th>
<th>Event Description</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>9/1/16</td>
<td>Emailed the three “yes” stakeholder-participants</td>
<td>The three “yes” stakeholder-participants</td>
</tr>
<tr>
<td></td>
<td>Reached out through different methods to find three more stakeholders-participants. I was much more direct this time as my own time was limited.</td>
<td>By mid-November second three had come onboard for a total of 6. I welcomed them and asked the same questions or similar as those to the right that I asked the prior “yes” confirmed participants.</td>
</tr>
<tr>
<td>10/20/16</td>
<td>Emailed welcoming the three “yes” stakeholder-participants, explained the project, 10-day timeline, and asked the following questions: I will be identifying you only by gender and self-identified role/s in the entertainment industry. Please tell me how you’d like to be identified. Also, if you consider yourself in a leadership position in any of the roles (it can be a non-traditional or informal leadership role). Does the problem identified above, a need for life-balance, speak to you? If so, why? If not, how might it be adjusted to have relevancy for you? Is 5-10 minutes a day for 10 days doable, plus the top-tail survey? Is there another way, or an additional way you suggest or would prefer to join in the research? After the research is completed, how would you like to receive the results of the data? What way/s would be useful? Would you be up for looking at the results and helping me make sense of it, and how it might be further applied.</td>
<td></td>
</tr>
<tr>
<td>9/2/16</td>
<td>Call with Capstone Advisor Dr. Stan Ward</td>
<td>Dr. Ward</td>
</tr>
<tr>
<td></td>
<td>We discussed the Final Assignment Collaboration Plan paper (for Collaboration Class), and how to complete it. Actions were to email Professor Bauer for advice and possible resources, and to write the paper. Professor Bauer responded that since she does not have information on the Capstone requirements, nor access to the Capstone Lab, to refer to Dr. Ward for his recommendations. Paper written.</td>
<td></td>
</tr>
<tr>
<td>February 2017</td>
<td>Call and emails with Dr. Lauren Moulton-Beaudry</td>
<td>Discussed adding participants not in the entertainment business, and recruiting additional allies and advocates.</td>
</tr>
<tr>
<td>Month</td>
<td>Activity</td>
<td>Details</td>
</tr>
<tr>
<td>------------</td>
<td>--------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>March 2017</td>
<td>Restarted contacting people to ask if they would consider participation.</td>
<td>As before, people would like specific dates before signing onboard. After two weeks of a hard push to contact people and realizing that dates really are necessary before I can get firm “yes’s” I put the recruitment push on hold until dates are known.</td>
</tr>
<tr>
<td>April- May 2017</td>
<td>New thesis draft and website hub for participants created.</td>
<td>New draft of thesis Chapters 1-3 turned in, and continued working on with feedback. Website hub and connected documents designed and implemented.</td>
</tr>
<tr>
<td>Late April 2017</td>
<td>New push for recruitment of participants.</td>
<td>19 people signed up. One participant died before the project began. 18 went into the project May 1.</td>
</tr>
<tr>
<td>Late April 2017</td>
<td>Participants joined the project and completed several preliminary activities.</td>
<td>Participants signed up, signed Privacy Letter and completed Preliminary Survey. They also had an optional Core Values worksheet they could engage with. 13 agreed to do a 10-15 min. exit interview on video or phone.</td>
</tr>
<tr>
<td>May 1-10</td>
<td>Participants did the reflective exercise.</td>
<td>Instructions on the website hub. Welcome, ½ way point, and end of project emails sent. Also, exit interview time slots set up.</td>
</tr>
<tr>
<td>May 11-15</td>
<td>Participants complete exit interviews and Post-Survey.</td>
<td></td>
</tr>
<tr>
<td>Date May 21</td>
<td>Results shared with participants.</td>
<td>The same webpage hub is used, re-designed for the results, and password protected.</td>
</tr>
</tbody>
</table>
## Appendix C: Capstone Project Timeline Spring 2017

<table>
<thead>
<tr>
<th>Due Date</th>
<th>Objective(s)</th>
<th>Stakeholder(s) Responsible</th>
</tr>
</thead>
<tbody>
<tr>
<td>April 17</td>
<td>Draft of webpage live for critique and feedback.</td>
<td>Hilary Adams; feedback from colleagues and Capstone Advisor</td>
</tr>
<tr>
<td>April 20(^{th})</td>
<td>Webpage live and social media and personal invites to the webpage sent (the invites will continue until the deadline to join the research).</td>
<td>Hilary Adams</td>
</tr>
<tr>
<td>April 24(^{th})</td>
<td>Chapters 1 and 2 revision due.</td>
<td>Hilary Adams</td>
</tr>
<tr>
<td>April 30(^{th})</td>
<td>Deadline for sign up to join the research. Deadline for adjustments to the webpage (if needed).</td>
<td>Participants</td>
</tr>
<tr>
<td>May 1-10</td>
<td>Applied research period.</td>
<td>Participants, Hilary Adams</td>
</tr>
<tr>
<td>May 10</td>
<td>End of research. Optional video exit interviews begin (if participants signed up to participate).</td>
<td>Participants, Hilary Adams</td>
</tr>
<tr>
<td>May 15</td>
<td>Deadline for survey responses, and optional creative responses and video exit interviews. Thank you, and the date the results will be shared on the webpage, emailed to participants.</td>
<td>Participants, Hilary Adams</td>
</tr>
<tr>
<td>May 14</td>
<td>Chapter 3 revision due.</td>
<td>Hilary Adams</td>
</tr>
<tr>
<td>May 21</td>
<td>Results and discoveries shared on the webpage.</td>
<td>Hilary Adams</td>
</tr>
<tr>
<td>May 29</td>
<td>Full thesis draft due.</td>
<td>Hilary Adams</td>
</tr>
<tr>
<td>June 18</td>
<td>Final Capstone Project Report due.</td>
<td>Hilary Adams</td>
</tr>
</tbody>
</table>
Appendix D: Core Values Worksheet

**Activity** - Determine your core values.

**Directions** - First, circle ten values from this list that are important to you. Second, put a star by five of those ten value. Then, rank order your top three values from that list.

*****

**Achievement** - a sense of accomplishment, mastery, global achievement

**Activity** - fast-paced, highly active work

**Advancement** - growth, seniority, and promotion resulting from work well done

**Adventure** - new and challenging opportunities, excitement, risk

**Aesthetics** - appreciation of beauty in things, ideas, surroundings, personal space

**Affiliation** - interaction with other people, recognition as a member of a particular group, involvement, belonging

**Affluence** - high income, financial success, prosperity

**Authority** - position and power to control event and other people's activities

**Autonomy** - ability to act independently with few constraints, self-sufficiency, self-reliance, ability to make most decisions and choices

**Balance** - giving proper weight to each area of one's life

**Challenge** - continually facing complex and demanding tasks and problems

**Change and Variation** - absence of routine; work responsibilities, daily activities, or settings that change frequently; unpredictability

**Collaboration** - close, cooperative working relationships with groups

**Community** - serving and supporting a purpose that supersedes personal desires, making a difference

**Compassion** - a deep awareness of and sympathy for another's suffering
Competence - demonstrating a high degree of proficiency and knowledge, showing above-average effectiveness and efficiency at tasks

Competition - rivalry and winning as the goal

Courage - willingness to stand up for one's beliefs

Creativity - the ability to discover, develop, or design new ideas, formats, programs, or things; to demonstrate innovation and imagination

Diverse Perspectives - unusual ideas, opinions, and points of view that may not seem right or be popular at first but bear fruit in the long run

Duty - respect for authority, rules, and regulations

Economic Security - steady and secure employment, adequate financial reward, low risk

Enjoyment - having fun and laughing

Fame - becoming prominent, famous, well known

Family - spending time with partner, children, parents, or extended family

Freedom - the power to act or speak without externally imposed restraints

Friendship - developing close personal relationships with others

Happiness - finding satisfaction, joy, pleasure, contentment

Health - physical and mental well-being, vitality

Helping Others - helping other people attain their goals, provide care and support

Humor - the ability to laugh at oneself and life

Influence - having an impact or effect on the attitudes or opinions of others

Integrity - acting in accord with moral and ethical standards; honesty, sincerity, truth, trustworthiness

Justice - fairness, equality, doing the right thing
Knowledge - the pursuit of understanding, skill, and expertise; continuous learning

Location - choice of a place to live that is conducive to one’s lifestyle

Love - involvement in close, affectionate relationships; intimacy

Loyalty - faithfulness; dedication to individuals, traditions, or organizations

Order - stability, routine, predictability, clear lines of authority, standardized procedures

Personal Development - Dedication to maximizing one’s potential

Physical Fitness - staying in shape through exercise and physical activity

Recognition - positive feedback and public credit for work well done; respect and admiration

Reflection - taking time out to think about the past, present, and future

Responsibility - dependability, reliability, accountability for results

Self-respect - pride, self-esteem, sense of personal identity

Spirituality - strong spiritual or religious beliefs, moral fulfillment

Status - being respected for one’s job or association with a prestigious group or organization

Wisdom - sound judgment based on knowledge, experience, and understanding

Bonus Activity - After you rank order your top three values, rate yourself on a scale of 1 (none of the time) to 5 (all the time) to assess how consistently this value has guided your decision making this week. What does your rank tell you about how committed you are to that value?

Appendix E: Participant Reflective Exercise Instructions (35% of Original Size)

Core Values & Flourishing

For an Integrated Life

An integrated life is one where your core values are an essential part of your actions and time use. The divisions between different areas of your life, such as work and non-work, are not the focus. Instead, the goal is to align your life with your values so that whatever activity you are engaged in is positively driven by a purpose unique to what is most important for you. This Capstone project takes you through the first steps of this integration process: Discovering your core values, reflecting on your current use of time and action around those values, and then making one change to better integrate those values into your life.

May 1-9
STEP 1
1 min
Close your eyes for 60 seconds. Think about your core values. “What values are most important to me right now?” Go to Step 2. This step is repeated 2×/day.

May 1-9
STEP 2
1 min
Write down the values or values that come to mind in Step 1. It may be useful to have a place to keep all 10 days’ settings together. Return to Step 1. This step is repeated 2×/day.

MAY 10
1. Close your eyes for 60 seconds. Think about your core values. “What values of three core values do I show?”
2. Then close your eyes for 60 seconds and reflect upon your core values. “Which two of three core values can I show?”
3. Next, close your eyes for 60 seconds and reflect upon your core values. “In what setting are my core values reflected in my use of time?”

MAY 10
Change
Determine one action you will take in the upcoming week that will better integrate your core values into your use of time. Write it down as a commitment to making this change. “I integrate my values into my use of time in order to...”

“What values are most important in my life, and how are they being expressed in my engagement with the world?”

A Capstone Research Project with Hilary Adams (C) 2017

http://www.hilaryadams.com
as part of the Ethical Leadership Master’s Degree

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Appendix F: Screenshot of Webpage Hub (30% of Original Size)
### Appendix G: Technology Used for Design and Implementation of this Capstone Virtual Action Research Project (VARP)

<table>
<thead>
<tr>
<th>Tool</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wix</td>
<td>Webpage hub (on personal website)</td>
</tr>
<tr>
<td>Contact Form</td>
<td>Sign up form element (included with Wix.com)</td>
</tr>
<tr>
<td>POWr</td>
<td>Surveys (free app, basic level of membership; added to the Wix.com page)</td>
</tr>
<tr>
<td>Canva</td>
<td>Used to create the instructions for the reflective exercises (free, basic subscription)</td>
</tr>
<tr>
<td>HelloSign</td>
<td>Privacy Letter signed online (free trial)</td>
</tr>
<tr>
<td>Zoom, Skype, FaceTime</td>
<td>Video exit interviews (depending on participant preference) (free services; Zoom is basic free level)</td>
</tr>
<tr>
<td>Snagit</td>
<td>Used to scroll capture the webpage, and to record the Skype and FaceTime exit interviews (free trial)</td>
</tr>
<tr>
<td>Gmail</td>
<td>Email (free service)</td>
</tr>
<tr>
<td>Doodle</td>
<td>Meeting polling and scheduling service (free basic level)</td>
</tr>
</tbody>
</table>

A Note on Affording Implementing a VARP: It is important to consider the possible additional expense involved in VARPs, which might be prohibitively high for the researcher. Aside from the Wix.com account, which I already used for my personal website, the rest of the tools used to implement the Capstone project were zero cost through free trials or basic level accounts. There was also PDF conversion made possible through my Mac laptop, and various types of files created on the same laptop, which were part of technology I owned, and I had access to the internet as part of the rental cost of my housing. My use of these free and trial account options demonstrated creative ways to keeping the expenditure low for a VARP.
Appendix H: Survey and Exit Interview Questions

Preliminary Survey

- Name
- Email Address
- What are your top three core values?
- To what extent do you incorporate these values into how you use your time?
- Would you participate in a 10-15-minute video (or phone) exit interview? (Y/N)
- Are you at least 18 years of age? (Y/N)

Post-Survey

- Name
- Email Address
- What are your top three core values? To what extent do you incorporate these values into how you use your time?
- What, if anything, has changed in your understanding of core values and/or incorporation of those values into your life?
- Is there anything else you would like to share?

Exit Interview

- Primary Prompt: What are your take-aways from this experience?
### Appendix I: Core Values as Listed in the Pre-and Post-Surveys

#### PRELIMINARY SURVEY CORE VALUES

<table>
<thead>
<tr>
<th>Core Value</th>
<th>Pre-Survey Percentage</th>
<th>Core Value</th>
<th>Pre-Survey Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Achievement</td>
<td>2%</td>
<td>Adventure</td>
<td>2%</td>
</tr>
<tr>
<td>Change and Variation</td>
<td>2%</td>
<td>Aesthetics</td>
<td>2%</td>
</tr>
<tr>
<td>Empathy</td>
<td>2%</td>
<td>Community</td>
<td>2%</td>
</tr>
<tr>
<td>Friendship</td>
<td>2%</td>
<td>Enjoyment</td>
<td>2%</td>
</tr>
<tr>
<td>Humor</td>
<td>6%</td>
<td>Happiness</td>
<td>2%</td>
</tr>
<tr>
<td>Justice</td>
<td>4%</td>
<td>Health</td>
<td>4%</td>
</tr>
<tr>
<td>Purpose (filled life)</td>
<td>2%</td>
<td>Helpfulness</td>
<td>2%</td>
</tr>
<tr>
<td>Wisdom</td>
<td>6%</td>
<td>Spirituality</td>
<td>2%</td>
</tr>
<tr>
<td>Balance</td>
<td>6%</td>
<td>Change and Variation</td>
<td>2%</td>
</tr>
<tr>
<td>Creativity</td>
<td>4%</td>
<td>Community</td>
<td>2%</td>
</tr>
<tr>
<td>Family</td>
<td>6%</td>
<td>Compassion</td>
<td>4%</td>
</tr>
<tr>
<td>Fairness</td>
<td>4%</td>
<td>Enjoyment</td>
<td>2%</td>
</tr>
<tr>
<td>Family</td>
<td>6%</td>
<td>Fairness</td>
<td>4%</td>
</tr>
<tr>
<td>Helpfulness</td>
<td>2%</td>
<td>Integrity</td>
<td>2%</td>
</tr>
<tr>
<td>Justice</td>
<td>4%</td>
<td>Joy</td>
<td>2%</td>
</tr>
<tr>
<td>Love</td>
<td>2%</td>
<td>Knowledge</td>
<td>2%</td>
</tr>
<tr>
<td>Only Allowing Positivity</td>
<td>2%</td>
<td>Love</td>
<td>2%</td>
</tr>
<tr>
<td>Purpose (filled life)</td>
<td>2%</td>
<td>Only Allowing Positivity</td>
<td>2%</td>
</tr>
<tr>
<td>Responsibility</td>
<td>4%</td>
<td>Only Allowing Positivity</td>
<td>2%</td>
</tr>
<tr>
<td>Spirituality</td>
<td>6%</td>
<td>Responsibility</td>
<td>4%</td>
</tr>
<tr>
<td>Truth</td>
<td>2%</td>
<td>Spirituality</td>
<td>2%</td>
</tr>
</tbody>
</table>

The pie chart above visually represents the distribution of core values as listed in the pre-and post-surveys.
POST-SURVEY CORE VALUES: RED = CHANGE FROM PRELIM VALUES

- Achievement
- Balance
- Compassion
- Empathy
- Family
- Happiness
- Humor
- Joy
- Love
- Purpose (filled life)
- Truth
- Adventure
- Change and Variation
- Competence
- Enjoyment
- Friendship
- Health
- Influence
- Justice
- Mercy
- Responsibility
- Wisdom
- Aesthetics
- Community
- Creativity
- Fairness
- Grace
- Helping Others
- Integrity
- Knowledge
- Only Allowing Positivity Around Me
- Spirituality
- Work-Life Balance

WORK-LIFE BALANCE
- Wisdom 2%
- Truth 2%
- Spirituality 7%
- Responsibility 4%
- Purpose (filled life) 2%
- Only Allowing Positivity Around Me 2%
- Mercy 2%
- Love 2%
- Knowledge 2%
- Justice 4%
- Joy 2%
- Integrity 2%
- Influence 7%
- Humor 2%
- Helping Others 2%
- Health 4%
- Happiness 2%
- Family 7%
- Friendship 7%
- Creativity 7%
- Empathy 4%
- Fairness 2%
- Knowledge 2%
- Only Allowing Positivity Around Me 2%
- Spirituality 7%
- Work-Life Balance 2%