



# **Equine Guided Leadership Education: Leveraging Somatic Intelligence in Learning Leadership Competencies**

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This paper is a revised excerpt from *Embodying Leadership: An Integrated Methodology* submitted Fall of 2006 to the Union Institute & University (unpublished thesis, Copyright 2006). *Embodying Leadership: An Integrated Methodology* takes an in-depth look at contemporary theories that speak to the notion of embodying or utilizing the intelligence of the body as an untapped resource for learning fundamental leadership competencies. This paper focuses on how Equine Guided Leadership Education (EGLE) facilitates the embodiment of leadership.

Up until recently there has been little research in the realm of Equine Assisted Learning (EAL). The effectiveness of collaborating with horses for human growth and learning has been supported mostly by strong anecdotal evidence based on observed behavior shifts from participant surveys by practitioners in the field. To date there has not been any academic research conducted to determine whether or not collaborating with horses to learn leadership competencies is any more effective than other types of leadership development methods like; leadership webinars/workshops, coaching programs, other types of experiential learning programs like ropes courses or outward bound type programs.

In Spring of 2012 The University of Kentucky's Center for Leadership Development, in collaboration with University of Kentucky HealthCare, conducted a pioneering research pilot study entitled: *The Effectiveness of Equine Guided Leadership Education to Develop Emotional Intelligence in Expert Nurses*. The results of this pilot study can be viewed at [www.ca.uky.edu/cfld/research.php](http://www.ca.uky.edu/cfld/research.php).

Research, or no research, the experiential learning metaphors that Equine Guided Leadership Education provides are deep and rich and deserve a much closer look.

Here is a peek!



(photo used with permission of participant)

## Introduction

Huge clues for leading ourselves and others are not any farther than our own and other being's bodies! This is a pretty radical statement but a very important one because ignoring the somatic and physical intelligence of the body is not only a profound oversight but a missed opportunity for developing human potential. The study of leadership currently lacks sufficient theory, models and practices that include the integration of somatic intelligence as a competency. Many models hint at a more embodied way of developing as a leader (and some of these are mentioned in this paper) but few describe actual ways in which people can develop a somatic sensibility around leadership competency development.

Equine Guided Leadership Education (EGLE), a form of Equine Assisted Learning (EAL), effectively facilitates learning through the integration of the four realms of human experience - the mind, the emotions, the spirit and the body. It also allows us to develop four fundamental leadership competencies: awareness, feedback, taking action and somatic intelligence. Other leadership competencies that spring forth from focusing on these four fundamentals are: integrity, congruency (where the words, emotions, and actions align), consistency, trust, service, vision, intention, patience, self-confidence, clear communication, trust, adaptability, empathy, team building, collaboration, responsibility, respect and many more. It just so happens that elements of basic horsemanship can help us to understand, practice, develop, and perhaps most importantly, to have a felt experience of these prized leadership competencies. A question we should be asking ourselves as leadership development professionals is whether knowing what "holding intention" feels like in your body actually changes one's ability to hold an intention as a leader. Therefore, taking a closer look at how horses can assist humans in developing embodied leadership is a worthwhile endeavor.

## Embodied Leadership and the Four Fundamental Competencies

After conducting a survey of contemporary literature (mid 1990's to present) on the topic of transformational and integral leadership competencies and characteristics, and from first hand observations and experiences working with others as a coach and leadership consultant, I have identified what I think are four fundamental competencies that must be fully developed and utilized for an individual to be an effective transformational leader. These competencies are:

- a deep and over arching **awareness** of Self and others,
- the ability to receive and give effective **feedback** and to fully understand the dynamic nature of relationships,
- the ability to take timely and appropriate **action** that springs forth from awareness and feedback, and
- the capacity to develop **somatic intelligence** or the ability to integrate information at the physical, mental, emotional and spiritual levels.

## Awareness

"If awareness never reaches beyond superficial events and current circumstances, actions will be reactions. If, on the other hand, we penetrate more deeply to see the larger wholes that generate "what is" and our own connection to this wholeness, the source and effectiveness of our actions can change dramatically" (Senge, Scharmer, Jaworski, Flowers, 2004).

In exploring the research literature on emotional intelligence and leadership it became clear to me that the ability to become *Self aware* (intrapersonal awareness) and to develop and sustain *awareness of others* (interpersonal awareness) is, indeed, a fundamental leadership competency.

James MacGregor Burns in his book *Transformational Leadership* (2003) feels that the components that determine the effectiveness of a leader are: self knowledge, self regulation, self development, and self directed change. Transformational leaders “make conscious what lies unconscious among followers” (Burns, 1978), or they become aware of that which they are unaware of. Burns (1978) felt strongly that “a leader’s fundamental act is to induce people to be aware or conscious of what they feel - to feel their true needs so strongly, to define their values so meaningfully, that they can be moved to purposeful action”.

In their book *Primal Leadership: Learning To Lead with Emotional Intelligence* (2002) Daniel Goleman, Richard Boyatzis, and Annie McKee, speak to the importance of Self Awareness, including emotional self-awareness, accurate self -assessment, and self-confidence, and *Social Awareness* - including empathy, organizational awareness, and service.

William Torbert (2004), professor of management and former director of the Ph.D. Program in Organizational Transformation at the Carroll School of Management at Boston College, has written extensively on what he calls action inquiry - the process of questioning in relationship with action. He states that “experiential learning involves becoming aware of the qualities, patterns and consequences of one’s own experience as one experiences it”. Or in other words becoming aware of how one is showing up in space and time.

I argue that without a deep understanding of the importance of acquiring a deep intrapersonal (Self) awareness and interpersonal (relational) awareness one cannot effectively transform and develop as an effective leader.

## **Feedback**

*The World Book Dictionary* (1987) defines feedback as: “a process by which a system or device regulates itself by feeding back to itself a part of its output.... a reciprocal effect of one person or thing upon another, especially as a reaction that affects the behavior of whatever produced the reaction” (Barnhart).

According to Pennsylvania State University professors and organizational researchers Rothwell and Kazanas (1998) feedback does two things. First it stimulates people to continue doing more or less of what they are currently doing and affects the *quantity* of the performance. By stimulating people to change how or what they do influences the *quality* of the performance (Tosti as cited by Rothwell & Kazanas). “Any approach that can improve the clarity and timeliness of feedback was perceived by trainers in one study to be among the most significant approaches to solving human performance problems”. Rothwell goes as far as saying that feedback is “the single most significant *noninstructional* solution to human performance problems”. If this is so, then why wouldn’t an instructional design professional want to make it an *instructional* solution?

It is the *quality* of the feedback that impacts performance the most. Therefore, teaching people the significance of proper and effective feedback- devoid of judgment, criticism and projection (enter the horse) - develops the competencies that can solve many performance problems as they arise and circumvent the need for situational training aimed at communication and conflict / resolution challenges. Making dynamic

feedback a strategic mission could be a new paradigm for high performance businesses.

## Action

Congruent leaders convey safety and build trust by the actions they take and through body language, tone of voice and even the choice of words they use. In the words of Max DePree (1992) “for leaders, there can be no disjunction between thought, and action”. This is precisely how horses live in the world. Their thoughts instantly translate into action(s).

Collaborating with the horse is an excellent example of learning leadership competency *in and through* action. Because horses feedback every action we take and every emotion we hold, therefore working with them forces us into an Action Inquiry mode - engaging us in first, second and third level feedback (Torbert, 2004). By being perpetually aware and curious (inquiry) about the comfort level of the horse, and getting feedback from them we can choose to act in ways that make collaboration happen easily and more frequently. Consistent actions, in this case, non-predatory actions on the part of the leader, builds trust among the followers. Nowhere in my experience does the statement ‘actions speak louder than words’ resound as true as it does when dealing with horses, because their’ actions are their’ words!

Horses are constantly responding to feedback in their environment. It is this ability to make and act on decisions in real time, using feedback, which allows the horse and their herd to stay safe. An organizational equivalent is the ability to adapt to economic change in a timely manner and remaining competitive in the marketplace.

## Somatic Intelligence

What is meant by somatic intelligence? Somatics, from the Greek, refers to the body in its wholeness. *Webster’s New Collegiate Dictionary* (1979) defines it as “of, relating to, or affecting the body “ (Woolf). “Generally, it also implies a philosophy of mind and body unity” (The Free Dictionary, 2006). According to Richard Strozzi-Heckler (2003) somatic intelligence refers to the “human possibility of harmonizing body, mind, emotions and spirit”.

Richard Strozzi-Heckler, Ph.D. is an authority on leadership mastery as well as a sixth-degree black belt in aikido. Dr. Strozzi-Heckler has developed programs in team building and leadership training that emphasize the importance of leadership as a somatic experience, one that integrates the four intelligences of the intellect (IQ), the emotions (EQ), the body or kinesthetic (PQ) and the spiritual (SQ). He firmly believes that the “body [is] indistinguishable from the self” and that “it is essential to include the body if one wants to build the skills of exemplary leadership” (2003).

At a very simplistic and instinctual level, the horse’s present-moment awareness results in behavior which resembles Torbert’s action inquiry. However, to make a direct correlation between equine behavior and human behavior would be to assume that the predator/ prey instincts, the fight or flight response that rules the horse’s psyche are on an evolutionary par with that of the human, which is not the case. Therefore, my intention is to show how becoming acutely **aware** of and integrating sensory information from stimuli in the environment (**feedback**) and **acting** on it in the present moment, much like a horse does, provides people with a more integrated process of information gathering (**somatic intelligence**) on which to make well informed decisions and actions.

## Embodying Leadership Competencies With Horses

So how does a horse accomplish this great feat of being a natural teacher of leadership?

Much of it has to do with the following facts about horses:

- 1) They are animals of prey. This completely different instinctual orientation and perspective determines their behavior towards their environment. For instance, a horse employs a 360 degree awareness of spatial relationships, allowing them to perceive and immediately react to things that enter their environment by using their sight, hearing, sense of smell and other kinesthetic sensibilities.
- 2) Horses maintain a hyper-vigilance – sleeping only two to four hours per day to keep themselves safe in a predatory world.
- 3) Horses communicate almost exclusively through body language, responding to their instincts for self-preservation and communicating in an instant.
- 4) They are social herd animals who depend on a social hierarchy of leadership to keep the entire organization safe and prosperous.

Therefore, if a person wants to successfully develop a leadership role with a horse it requires us to extend, utilize and leverage our perceptual awareness and mindset for the greater good of the whole. It also requires people to develop an understanding of and a proficiency in using the same language as those they desire to lead - in this case it means using body language as the primary mode of communication. Learning how to do this is not unlike corporations who desire to gain and maintain a competitive market advantage in a global market employing strategic liaisons who learn the language and cultural customs of the country they wish to do business with.

In other words, to effectively work with horses we must **'show up as leader' on all levels!** By integrating awareness, feedback and physical action with true empathy the horse is a veritable somatic genius! It would be foolish not to learn from such a Master. The biggest obstacle standing in the way of this collaborative learning is perhaps our own instinctual predatory nature which keeps us from viewing the horse as the master teacher of this leadership skill set.

## Integrity and Trust

When speaking about the workplace Max DePree states that “we should treat the great majority of people as volunteers. They don't have to stay in one place. They don't have to work for one company or for one leader. They follow somebody only when she deserves it” (1992). Leaders, both equine and human, earn the trust of their followers by demonstrating integrity. “When you are with a horse, consistency is how she measures integrity, so the horse must be your prime focus all the time [leading by following the cues of others]. She needs your constant reassurance that everything is in control, and everything from your position [alignment] to your bearing [moving forward], breathing and even the subtlest gestures must reflect this” (Irwin, 2005). In the realm of leadership, natural horseman and equine communication educator Chris Irwin states, “you may be strong enough to establish leadership, but you also have to be consistent enough to keep it. Horses... don't think in terms of 70 percent or 80 percent. Either you are the boss or you're not” (2001). “If we want horses to focus their attention on us, we must learn to focus ours on them. That's easy enough to do in spurts. The real trick is to learn to maintain it for as long as we need to. There's no automatic pilot on horses. They are constantly sending you messages and they constantly need some response” (Irwin). In business the second you let your awareness lapse is the second your

competition comes in to gain the advantage or an important project falls through the cracks. So it is with a horse. The moment your attention lapses is when the possibility of either you or the horse getting hurt increases by your inability to provide safe leadership. Quite literally the lives of both human and equine depends on competent leadership - leadership that takes its cues from a place of embodied awareness. This level of leadership requires a person to keep their attention on both their internal and external environments simultaneously which encourages the development of 'super-vision' (Torbert, 2004). Refer to Figure 1.

\*Figure 1: Developing and practicing Super-vision with a horse.



For horses to trust others (either other horses or humans) they must feel that the leader is consistently providing them safety which entails increased perceptual abilities on the part of the human. When horses do not feel safe they become tense, agitated, and sometimes aggressive. When horses feel safe they might lower their heads, lick and chew, their body relaxes and they may even fall asleep. Their physical reactions are always congruent with their state of emotions. In other words, horses don't lie. According to Ariana Strozzi, founder of the Equine Guided Education Association and 'Horses and Leadership' facilitator, adds, "Humans on the other hand can say one thing with their mouth and something entirely different with their body" (2004). Horses read the incongruence in people which breaks their trust, resulting in them taking actions that move them towards safety. As 'authenticity detectors' horses only *willingly follow* a person's lead when actions consistently align with intentions.

"Somewhere along the line we [humans] learned to tolerate this inauthentic behavior as a species" (Strozzi, 2004). If we know that people have the propensity to be incongruent - somatically dishonest- and if we know that to effectively lead others requires personal integrity and the ability to develop trust among potential followers, then it is good to know that there are experts on the planet, horses, who can teach us how to become wholly honest, congruent and trusting leaders.

## Leaders and Followers: The Chicken or the Egg?

Working with horses teaches us about the leader-follower relationship. Strong leader-follower relationships can be created between humans and horses depending on how deeply we embody this high level of awareness and how well we are able to “speak” the equine body language and take action. Because a horse is a social herd animal, they are leader-seeking beings, and therefore, they are natural followers. They want the people in their lives to be their leader so that they can relax their hyper-vigilance and trust that their best interests and safety will be kept in mind.

In *The Future of Leadership* Kouzes and Posner state, “followers respect and trust transformational leaders, so they conform their values to those of the leader’s and yield power to them” (Kouzes & Posner as cited in Bennis 2001). One way to physically experience and practice the complex nature of the leader - follower dynamic leadership is through “join up” with a horse. Achieving join-up with a horse allows leaders to understand that leading is not *power over* but *power with* (Burns 2003) - it is leading by being acutely aware of and following the cues of those you serve. This type of connection is true collaboration.

Join up is the moment when the horse decides to recognize you as being more interesting to them than the surrounding environment. When they put their trust in you they willingly follow you anywhere you go without a halter or rope attached (see Figure 2). When successfully done “join up” feels and looks like magic! In actuality, it is just the outcome of sustained and consistent awareness, using triple loop feedback, and right action simultaneously. However this is easier said than done!

\*Figure 2: Join up: Leading the Horse Through Connection.





## Emotional Congruence

Horses do not “make any distinction between how they feel and how they act” (Irwin, 2005). It is because of this embodied honesty that they can read the truth about us - they come to understand ‘who’ we are by ‘how’ we are. “In fact, dishonesty is so far out of their range of their experiences that they can’t even imagine anyone else lying” (Irwin). “Unless they’re intimidated into submission, most horses refuse to cooperate with the False Self” (Kohanov, 2003).

According to EAL practitioner Ariana Strozzi (2004), human authenticity “is expressed by a genuine wholeness between the inner and outer emotional, energetic states of being .... Horses are unwilling to accept our false pretenses. They only listen to what is on the inside. When our inner and outer presentation is incongruent, the horse enters a heightened state of agitation”. Horses show us when we are *emotionally incongruent* or when we are hiding one emotion by trying to feel something else, by mirroring back the emotional state we are in. “No matter how good you are at hiding things from yourself and others, your nervous system still involuntarily broadcasts what you’re really feeling - at a frequency horses are especially good at tuning in to” writes Linda Kohanov (2003), who facilitates equine assisted learning programs in Arizona. With this feedback horses call us to our ‘Authentic Self’ (Kohanov).

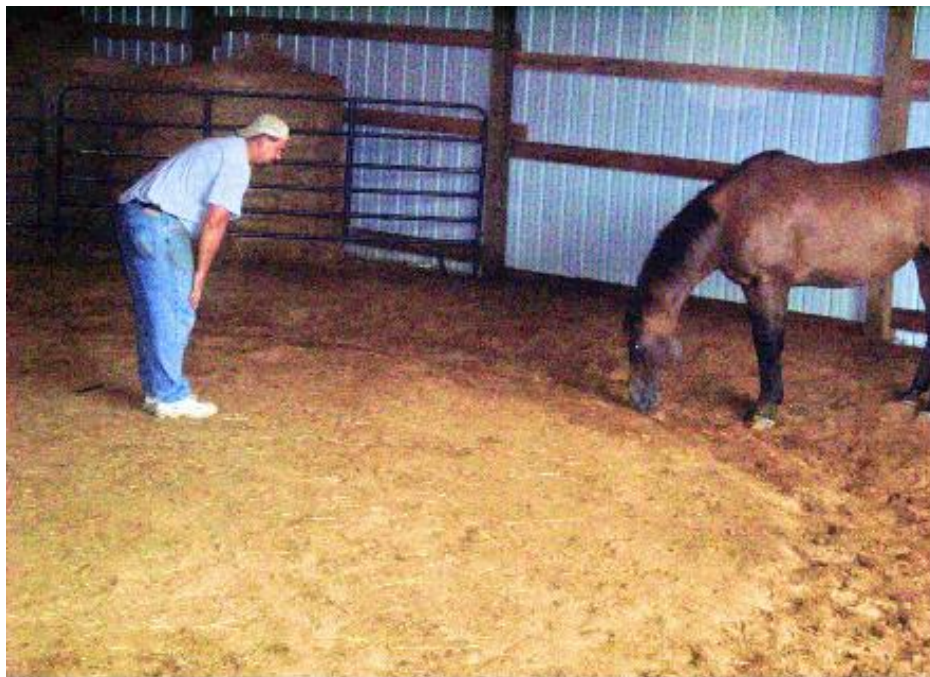
An example of incongruence is when a person approaches a horse acting brave, but is, in actuality, very afraid of the horse. The horse senses this mixed message and becomes weary of that person’s intentions and often times will mirror back the person’s underlying emotion, in this case fear. With a horse, it is much safer and productive to admit that you are afraid and become congruent on both the emotional and physical levels than to pretend. Generally the instant you become congruent is the instant the horse can relax too! At an unconscious level people pick up incongruence with other people in the same way.

A situation like this happened in an EGLE workshop I conducted with six executives. An executive was in a round pen with a horse named Mirkos and was instructed in how to move the horse out to the outside of the pen using, as best he could, the body language of the horse. Normally if the person who is moving the horse around the round pen holds a clear intention, is emotionally congruent, is consistent when using the equine language of directing body pressure towards a horse to move it away, as well as avoids the predatory instinct of attempting to control the horse by the head (by aiming the energy from the core of our body, located at the navel, at the horse’s head or attempting to grab or pet a horse’s head), then the horse, when the pressure is taken off, will turn in and usually walk right up to the “leader” and, without any type of halter or rope, follow the person anywhere they go in the round pen. The horse stops when the leader stops, and goes when the leader goes keeping a respectable distance of two to three feet from the leader.

In this instance, the executive was successful in getting and keeping Mirkos out at the rail at different gaits (walk, trot and canter) by using the appropriate body language as he moved Mirkos round the pen. Yet, when it came time to see if Mirkos was ready to accept him as leader, Mirkos turned inward and faced the executive and stopped about 12 feet away. Mirkos stood there swishing his tail with his large frame bent in towards the executive, as if he was pushing back. He was obviously reluctant to walk in and willingly follow this man. The executive was asked to check his stance to make sure his body language was not being predatory in nature - with his hips or shoulders directed at Mirkos’ head. His stance was fine. Yet, this horse was still reluctant to come in and join up. The executive was asked what his emotional state was

at that very moment. He replied quickly and a bit sarcastically that he was “feeling happy.” Yet, there was Mirkos 12 feet away looking frustrated, wary and unwilling to approach. Again he was asked to check in with his emotional state. No answer came from the executive, then, all of the sudden, Mirkos swung his head in, licked his lips and bowed towards the man in the center and walked toward him. Bowing and licking are signs that the horse is accepting leadership. (Refer to Figure 3.) The executive was then able to go up and pat Mirkos on the shoulder and conduct the join up portion of the exercise. During the debrief the executive admitted to being frustrated with Mirkos’ performance (most likely a projection about his own performance in the round pen). So in ‘real time’ he was experiencing frustration but when initially asked how he felt he had said he was “happy.” This is incongruent behavior. As soon as he became congruent with his emotions Mirkos felt comfortable enough to come in. The beauty of this situation is that the horse was able to show this person how being incongruent breaks trust. “Alignment starts with the realization that every move we make and every position we take must further our leadership aims” (Irwin, 2005). This is true in human-to-human relationships as well.

\*Figure 3: Mutual acceptance of Leadership through bowing.



### **Program Description and Conclusion**

The format of EGLE workshops will vary depending on the size, the objectives of the group and time limitations; from three day intensives for upper level executives and managers to workshops that last 5 to 6 hours with corporate teams and students. Workshops incorporate experiences with the horses that allow participants to gain confidence and skills - from *Meet and Greet the Horses*, a purely observational exercise to haltering and leading, followed by *Leadership Metaphors from the Round Pen*. Every step of the EGLE experience is followed up with time to reflect and a debrief session.

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from such a Master. The biggest obstacle standing in the way of this collaborative learning is perhaps our own instinctual predatory nature which keeps us from viewing the horse as the master teacher of this leadership skill set.

Equine Guided Leadership Education's great potential as an experiential leadership methodology lies in its ability to naturally integrate all levels of experience, the mind, emotions, spirit and especially the body. It speaks to the heart of what the world requires from its leaders- the ability to develop deep empathic relationships by heightening and strategically deploying our somatic intelligence. EGLE provides the means by which leaders can get equipped for the task. Working with a horse is a powerfully integrating experience. It is learning in action through relationship problem solving. It is a unique way to teach and embody leadership competencies.

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