

**MA Integrative Project B | Final**

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## **Executive Summary**

This comprehensive transformative career plan provides direction for my livelihood over the next 7 to 10 years. It charts a course towards my desired future as an entrepreneur in the spiritual services industry.

This paper integrates abrupt changes in my career plans since 2018 and represents about two academic quarters of planning. Ultimately, I aim to build an integrative spiritual health facility, Sanaahalili, by 2031. The facility will house an interfaith temple, retreat center, and research institution. This is an ambitious plan that will require me to strengthen my existing skill set and gain new ones. To reach this moonshot, I have decided to create a three-phase path that allows me to mindfully set a solid foundation for the business to ensure its success. First, I will strengthen my skills as a coach with a spiritual advisement practice over the next year. Second, I will begin building an experiential coaching business with my partner, called the Transformance Group. The data culled from this practice will inform the end goal of data-driven programming for Sanaahalili.

Someone highly aligned my career goals with the CTS programs' learning objectives, as I will incorporate concepts such as living systems, adult consciousness development, mytho- and autopoiesis, and spiral dynamics. These components are critical to my path and to the business models that will carry it forward.

The three phases are presented here as a series of nested projects within the framework required to complete it. Since it is not about a single project, certain sections will apply to certain projects. This is not my ideal, but the time to implement my next steps is already upon me. So, this is the most viable way for me to make use of the information I have right now. Integrating

all these moving parts has proven to be an impactful planning tool to the extent that I have already begun executing some parts of all three phases and the results are exciting.

### **Introduction**

I am on a journey by moonlight. Just two years ago, I was on track to be a tech entrepreneur. I was running a small web and personal development firm. Circumstances beyond my control completely derailed those plans I had on that trajectory. I felt as though I was pushed by the heavens and my ancestors were the only ones privy to the destination. With that, it helps to say that I am writing this plan with all that uncertainty aside rather than riddling this paper with qualifiers. I am concentrating on the variables over which I have control.

My aim is to become an entrepreneur in spiritual services, by pioneering the whole-person and integrative health industry. I will do this by building a series of companies and becoming a visible thought leader in the industry. These companies will be aligned with the essence of who I am, priestess, teacher, advisor. By priestess, I mean I am a governess of the senses in the way that I "hold space". I have a natural tendency to design and direct the way other people experience events. I love creating experiences, innovating broken systems, and helping others to become the best version of themselves. Further, I want to contribute to policy change by encouraging leaders to think from an integrative perspective.

From what I've learned in the past, I know that walking this path has less to do with *becoming* and more to do with *being*. While writing this introduction, I was watching the series *Stranger Things*. I've always loved movies about children living in their own worlds, creating, building, and learning. One of the principal characters in this series, Dusty, built his own Hamm Radio. He didn't set out to be a Hamm radio specialist. Dusty found something that he loved to

do and kept doing it. He helped his team to overcome the monstrous Demogorgon by contributing a skill set he developed out of a love for it. Similarly, I am developing my career path from a place of love and devotion.

### **Three phases for Transition**

The plan is to move through this transition in phases. To achieve my eventual career goal of building an international institution, I need to acquire certain skills and get paid while doing so. Since I am currently without a salaried position, I first need to create a solid brand and financial foundation for myself. Second, I will build a business that acts as research and development for a holistic healing center. Finally, I will build the ultimate vision of the research institution, which includes a temple and research laboratory.

#### **Phase One**

To create the foundation for myself in phase one, I will immediately begin offering spiritual advisement services through tarot readings, workshops, and facilitation. It is my primary focus for the next six months to a year. This will give me the opportunity to work on my skillsets of visibility, holding space, intuitive advising, and money management. This is a simple business model. Clients book my services using my online website where I offer four services. Tarot reading, Intuitive Coaching, Personal Power workshops, and Change facilitation. The tarot reading is the easiest and most straightforward. Intuitive coaching calls for me to incorporate astrology, numerology, and tarot to inform the coaching goals. Personal power workshops help people to identify and improve their distinct power signatures to reach their goals. The offering of Change facilitation helps people who need help navigating their spiritual journeys.

#### **Phase Two**

As mentioned, I ran a web development agency for about four years. Just until I started the CTS program in 2018. My company, the MoonRose Agency, did more than web development. We specialized in a whole-person approach to business leadership development that informed the clients' mission, vision, and values. This foundation informed the brand and operations. The brand and operations informed how we developed the website. In this way, I insured alignment between the client and their business so that both could operate with clarity.

My background is in Marketing, Business Development, Community Organizing, and Urban Development. But my future is in the holistic wellness industry. Therefore, my first inclination was to drop my past career experiences and move forward with a fresh start in spiritual services. However, after talking it over with my classmates, they suggested I find a way to blend the two together.

I didn't exactly know how to do this until my partner, Kevin Johnson offered me a position as CEO for his company, the Transformance Group. Kevin has over 20 years experience as an executive coach and a successful business. He has offered me a position as CEO for the Transformance Group (TG). This is an amazing offer and has thrown my original plans for a loop. After some soul searching, I've discovered a way to take my classmates' advice and my partner's offer. Instead of re-opening MoonRose, I will integrate the successful aspects of MoonRose's plans with the lucrative aspects of TG. I will move forward as with Kevin as CBDO.

The company will be a leadership development agency for healers, leaders, and their companies. I can extend my background in marketing, strategy, experience design, and coaching to TG. Simultaneously, Kevin will bring his wealth of experience along with a robust network of

high-net worth clients, coaches, and advisors. He has a similar educational background in human consciousness development and welcomes the depth of my spiritual practices. This allows both of us to maintain our authenticity and experiment with our dream projects.

### **Phase Three**

Phase one sees me establishing myself as a financially fit, capable spiritual advisor. Phase two helps me to develop spiritual, collaborative business leadership. Phase three requires me to put those skills to practice to establish my ultimate dream, Sanaahalili. Sanaahalili (SH) will be an interfaith temple, retreat, and research center dedicated to helping people navigate the mytho- and autopoietic aspects of their spiritual journeys. It will be a foundational space to put into practice all the research that we've gathered from our experiences in phases one and two. The retreat center will be a space for healers, leaders, and executives of all types. While the research center will serve as a space to bring together great minds from all over the world to work on humanitarian efforts.

### **Career Description**

About three years ago at the beginning of my CTS journey, I took the soul purpose and professional identity course. During this course, I had an incredible experience on vision quest in South Korea. Though I'd taken the assignment seriously, I had no idea it would have such an ineffable effect of my life.

During the vision quest, I received a message from Spirit that my life purpose is to "bring order out of chaos" as an advisor, teacher, and "consigliere". The essence of my *how* is that of priestess and alchemist. At the time this made absolutely no sense. Now I'm finding it all makes perfect sense and is more of a testament to what I've been doing.

Teaching and advising are the straightforward aspects of my career goal where I already have formal experience. I am learning the priestess aspect has more to do with how I do that. Priestessing has more to do with the way that I conduct teaching and advising. It is about how I set the mood before an advising session or design the checkout operation for booking an appointment with my company. It is about my technique for transmitting information so that clients have a curated experience with the services I provide.

As alchemist I am bringing together spirituality, psychology, science, technology, and in some cases pop culture to help clients with their goals. I assist others with their initiations and self-healing by helping them make sense of things. It is about ordering, listening, and shapeshifting through language to make it easier for clients to feel comfortable during the work. I am a mediator between Spirit and those who have a hard time connecting to It. Whether a person is a Buddhist tech executive or a reformed gang member from L.A., I can speak their language and create the right setting for them to connect and heal themselves. And I have loads of fun doing it!

If I had to describe my place in the human consciousness industry, I would place myself in the SANDS (Science and Non-Duality) or IONS (Institute of Noetic Sciences) camp with a pop culture twist. My message is that the world we are seeking is already in us—as individuals and as the great One. After years of working as an activist, I've learned that fighting is a fruitless ordeal. Moving ourselves closer to ideal through accountable action is the only way to create the changes we seek.

While I would prefer to find a single term to describe my path, it is as such; priestess, teacher, consigliere. It is part Carolyn Myss, part Rhianna. It is Marina Abramović and Oprah. It

always seems to be parts of this and that with me. But I suppose this is what an alchemist does. Creating something different from the parts that are already there.

### **Mission, Vision, and Values**

My career mission is to catalyze, council, and nurture the spiritual expansion of humanity. My vision is to renew a sense of magic and wonder back into the fabric of society. These ideas are very necessary for humankind. As we continue to create more inclusive social structures to meet the looming challenges of this century, I feel it is imperative that we are intentional about infusing peace, pleasure, and joy as we endeavor to improve the state of humanity. We have a fundamental need for relief along the way.

Transformance Group (Phase 2) and Sanaahalili (Phase 3) have missions that are aligned with my career vision and values. For TG, the vision and mission are as follows:

"Transformance Group is an experiential personal growth firm that builds soulful leaders. We are a courageous company dedicated to creating leadership capacity and capability. We are coaches, authors, artists, athletes, and philosophers with a uniquely diverse lens on solving important problems in the world."

For SH, The organization's vision reads:

"As humanity hurtles through the galaxy toward a brighter future, Sanahalili will inspire peace, joy, and wonder by helping people find union within themselves. We will activate a genesis of new leaders, inspire awe for the human spirit, and build deep relationships with clients, partners, and supporters that help them exponentially further this vision."



TG's mission of "solving important problems in the world" is the foundation for SH's mission of "activating a genesis of new leaders". In this way, one builds on and supports the other.

Both organization's values stand on four pivotal concepts: Well-being, Wonder, Wisdom, and Wealth. Well-being emphasizes self-awareness, care, and compassion. Wonder makes a profound, positive impact with every interaction. Wisdom offers valuable insights in policymaking and thought leadership. Wealth promotes the perspective of responsible stewardship in all things.

These fundamental ideas have expressed themselves in various ways through business ventures I've had since college. Wonder and magic were always two things that I wanted to create for people, no matter what I was doing. They also helped me to stay consistently inspired with the work. Wisdom, well-being, and wealth are concepts I am just now confident enough to stand on. They are vitally important to keep in mind as communities and service organizations often forget them and fall apart shortly thereafter.

Here, I am reminded about the movie *Monsters Inc.* For the first part of the movie, the monsters' job was to scare children in the middle of the night and capture their screams as energy to power the monsters' world. After a long adventure with a little girl, the two principal characters realize that the children's laughter was far more powerful than their screams of fright. The monsters decided from then on to inspire the children with play.

This is very similar to my philosophy. I believe we can get much more accomplished if we inspire each other with love and compassion, rather than competition and aggression. Yes, these business models provide services for those in spiritual crisis and those crises can often be

dark experiences. But that doesn't mean we have to approach the whole of the spiritual experience with heavy sobriety.

I also hope that I can help elevate the role of spiritual practitioners and coaches in society. I do not believe that the current level of respect we give them reflects the societal need for these practitioners. People are taking notice of spirituality and becoming more accepting of the practices and the industry. But the relationship between wellness practitioners and the public is still not where it needs to be to move civilization to the next level.

I look forward to an era where practitioners give themselves credit and professional respect that is proportionate to the time and effort they've put in to learning their craft. I don't know how many highly skilled specialists I've run into that treat their businesses so carelessly that they don't even have a way for clients to pay them short of sending a check. This must stop! I intend for both business models to give fellow specialists an elevated way of looking at themselves and their practices.

### **Relationship to CTS**

The fundamental mission of the Consciousness and Transformative Studies program is "Consciousness-in-Action". The program aims to move students to conscious, compassionate leadership "in service of personal, organization, cultural and ecological change" (Jaenke, n.d.).

My career mission, vision, and values are squarely aligned with all four of CTS's Program Learning Outcomes (PLO). One of those outcomes is to "Explain and apply a developmental view of consciousness and human evolution oneself, others, and systems" (Jaenke, n.d.).

Business models for both TG and SH focus on adult development in Robert Kegan's stages of the Self-Authoring mind (4) and Self-Transforming Mind (5) (Blum, Kegan, 1984). Through the work outlined in my vision, I will help others create and sustain healthy, aligned identities.

The second PLO is to "demonstrate intrapersonal and interpersonal intelligence and accountability using psychological and spiritual principles and practices". My projects are aligned with this aim, in that I focus on hermetic law and mytho-/autopoietic principles of alchemy. Instead of focusing purely on the mind with Kegan or purely on spiritual development with alchemy, my programs integrate these perspectives to give clients a more well-rounded awareness of their consciousness.

The third PLO wants graduates to "explain and apply systems theory, principles at the individual, community, organization, and planetary levels. According to Fritjof Capra, systems thinking "shifts perspectives from (isolated) parts to the whole". (Capra & Luisi, 2014, p.80). As parts of the whole have their own organic systems, problem solving is most effective from the perspective that all parts affect the greater whole.

My career objectives emphasize this perspective. Programming for TG takes the living systems perspective into account as I coach my clients on Radical Transformational Leadership, a concept set forth by Monica Sharma. Part of being a radically transformative leader is leading with Radical Wisdom, which requires a universal, innate understanding that connects all of humanity (Sharma, 2017). Sharma also believes this wisdom must be integrated with a leader's inner skill sets to take compassionate, inspired action. In this way, the leaders I will be coaching

are part of our planet's living system. And they are called to assist in re-balancing inequities to create a healthier living system in the future.

"Applying critical thinking, inquiry and participatory research skills in service consciousness growth and systems change" is CTS's fourth PLO. Not only have I applied critical thinking and research to build these companies, but a pivotal part of SH's model is also a research facility. I dream of having a large research facility dedicated to learning more about the evolution of human consciousness evolution. Currently, some portion of TG's business model invites clients to share anonymous data around the impact of their coaching engagements. Here, my partner and I will be able to see their histories and identify patterns across client demographics. We can learn where clients get stuck and the most effective ways to mitigate these stagnant states so that they move toward their goals with greater ease.

Moving forward, CTS's Program Learning Objectives will be exceptional gifts to my vision. I intend to continue building upon these objectives to keep my values in alignment and create a depth of experience for my clients in the future.

### **External Scan**

Conducting this scan confirmed that the self-help industry will be fulfilling and lucrative for me. According to Market Research, by 2022 the Self-Improvement industry will have an estimated growth of \$13.2 billion, with 5.6% average yearly gains (LaRosa, 2015). Even with a boom in the industry, there is room for unique approaches to self-actualization. Millennials like myself seem to drive growth in the industry, as 94% of those surveyed say they're willing to spend nearly \$300 a month on self-improvement (Pesce, 2018).

Since TG is currently a virtual business with existing structure, it is more important to use the scans as an opportunity to explore SH. SH will be a massive undertaking, as the business model has three different moving components. This could reflect the fact that I am in the early stages of ideation. But for now, the external scan reveals complexities I'm not fond of. I've created a simplified graphic of the scan from each segment. A graphic of the scan is in Appendix A and a Market Analysis can be found in Appendix C.

### **Technological**

The primary strength in this area is our tech savvy. Both myself and my partner are novice coders and can build basic software. The star components of both businesses are the operations and technology. I am using TG's data as a research and development container for what will eventually be the foundation for SH.

Technological innovations in the self-help industry and consumer comfort in using these modalities have exploded over the years. Self-help apps such as Happier, Calm, and Shine became mega players in the app game in 2018. By mid-2020, Calm and Headspace tied for 70% of the wellness category's market share (Bhisey, 2021). While I don't have immediate plans to build an app, I am planning on creating an app-like experience for clients. These numbers bode well for convincing clients to use the technology as an aid to their coaching journeys.

### **Detection**

For now, TG's primary technology weakness is that lack of cohesion. Our system comprises a handful of different platforms. Kajabi, QuickBooks, WordPress, and Platform.ly are the different software that currently service about 50 coaching clients and eight corporate clients. This creates many opportunities for miscommunication in project goals, contracts, etc.

Another issue is that the virtual aspect of the business makes it difficult to create the kind of experience that sets TG apart from other coaching organizations. Setting a tone and creating a field for one-on-one transference is much easier in an office environment. But considering that many clients are still following pandemic protocols, virtual sessions are the best we can do. Even once it is safe for protocols to be lifted, our clients are all over the world and so are our coaches. Therefore, we need to create a system that everyone can use to create a unified experience.

### **Remediation**

It is best to move forward by building a single software that will resolve these issues. This kind of project is beyond my expertise, and I will need to hire someone to do it. Initial estimates from our proposal have ranged from \$30-50,000. While this is not an unreachable goal, it is beyond our means currently. In the meantime, I will have to fall back on my own skills to create an intermediate solution: instead of building a single software, I will make find the best existing platforms and make the integration between them much smoother. This will give us some time to build up our reserves to build the proprietary software that will also be a foundation for SH.

SH's system will use this software to chart, manage, and expect the needs of its clients. This massive data system will require constant upgrades and maintenance. Depending on how this collaborative effort unfolds, it could take a team of data specialists to manage it. More than this concern is the top security of the data that will also have to be managed along with HIPPA laws for medical records.

### **Government and Regulatory**

Government and regulatory issues are not a current problem for TG. Aside from privacy concerns, we can operate without any regulatory interference. This is the primary strength. The United States does not regulate coaching practices. But for SH, there are heavy government regulations that will affect program offerings.

### **Detection**

The programming calls for techniques such as breathwork, yoga, and some shamanic practices such as Ayahuasca. Many of these substances are illegal under federal law. For instance, U.S. law considers ayahuasca a Schedule I substance, along with many other types of DMT (Sullivan).

Another issue is the fact that I want and need building space. There are some virtual components to this, but SH is a physical experience. Finding a plot of land or existing building with the right zoning may be a challenge. SH will need to be in a zone that is open for office, medical, and maybe even hospitality depending on the municipality.

### **Remediation**

For regulation on the use of DMT, the one workaround this issue is to declare the temple aspect of SH as a religious institution and containing the practice to the temple. This is a very straightforward method that is being used by many organizations. The Ayahuasca Church of Mother Earth provides advocacy and support for others seeking to use the plant in their healing modalities.

As for permitting for the space, I took a trip to San Diego to gain an understanding of the current business landscape. This can change drastically between now and the time when SH will

be launched. But the current landscape for spiritual startups is very conducive to finding an appropriate space there.

### **Economic**

Concerning TG, the economic outlook is strong. The International Coaching Federation just released an updated *COVID-19 and the Coaching Industry Study* which cited a positive outlook on the industry with a growing need for life vision and enhancement coaching (ICF, p.26). As a researcher from Northeastern University put it, "There are about 20,000 life coaches and consultants working in North America today, earning median \$61,000 per year, about twice that of the average U.S. Worker" (Nisbet, 2021). As for spiritual self-care. The Global Wellness Institute estimates the industry is worth about \$4 trillion (Ballentine, et al., 2020). The external economic outlook for SH is strong as well. But there is a concern for the cost to build the facility.

### **Detection**

After researching cost to build, SH could be quite an expensive project. The startup budget for even a storefront pilot will need to be at least \$175k. This is the minimum for comfortably leasing the space, hiring, and purchasing technology. The cost to deliver services could affect market segmentation for SH. Insurance may not cover about 50% of the services on top of which most American's don't have any. The services will need to be paid out of pocket. I am working on a sliding scale or pay what you can model, which may also put me at odds with investors. If I base my projections on current TG data, SH can easily accommodate a middle-and upper-class clientele. But focusing on these segments is out of alignment for the company's mission and vision. I will continue researching creative pay arrangements.

### **Remediation**



Time is the greatest asset for mitigating initial build-out costs for SH. If I am already thinking long term, I can begin creating streams of income to save what I will need to build the pilot. I do not intend to save up enough to build out of pocket. But I could save up enough of a down payment to receive financing for the costs. At the very least, having a large buy-in would be attractive to investors. I'm confident that I can at recover startup costs within the year if I market virtual programming ahead of time. Hopefully, year two will see solid returns.

### **Sociocultural**

The Covid-19 pandemic has reminded us we experience life physically. We need in-person experiences to mark our sense of time and nurture important relationships. We are also yearning for more unique experiences. There is a desire to have encounters that takes us deeper into magical places.

More inclusivity also means more sociocultural diversity. We are finally seeing what it looks to include all kinds of humans across race, gender, physical and neurological abilities. Both TG and SH will provide programming that makes it easy for people across that spectrum to connect and build with each other. Both business models rely heavily on human connection, even if that connection is virtual. Clients and coaches are powerful strengths for both organizations.

### **Educational**

My partner and I both have very strong educational backgrounds in human consciousness. Our stability comes from the fact that the business model and its success rely on our greatest strength. I am leaning heavily on our education for the success of both businesses. For SH, we will need even more brainpower.

### **Detection**

Finding collaborators will be pivotal to the success of this project. I will need advisors from all kinds of backgrounds. I composed my model advisory board of writers, philosophers, scientists, artists, shaman, and mathematicians. Nothing would make me happier than to build an organization from the collaboration of all those perspectives.

### **Remediation**

Though Kevin's network is full of wonderfully smart people, I would like to build up my own connections. I have time to do this while I am building my personal brand over the next year or two. I plan to spend the time attending conferences, workshops, and other collaborative events where I can find like-minded individuals.

### **Professional**

SH will need the same service providers any other business would require. Accountants, lawyers, and probably a real estate professional. I will need a highly talented lawyer and a handful of outside medical providers to point out any threats to our service offerings. This also brings to mind that it makes me nervous to think that so much of this business is out of my hands. If a researcher or a doctor on the team wanted to take the SH model and go build a competing entity. That scares me more than anything else in any aspect of my scans or SWOT analysis. Short of drowning everyone in non-compete clauses, I really don't know what I'm going to do about that.

### **Religious**

This is another factor in my favor. We are becoming more 'spiritual, but not religious' society. People are more open-minded in their approach to mental and spiritual health. SH is well positioned for dealing with deeply complex spiritual issues. Especially where it concerns

autopoiesis and mythopoesis phases of the spiritual journey. Very few institutions or individual practitioners specialize in the helping people get through these murky inner waters. SH is a place where the shaman and the priest will have to work together. Here, I will continue to educate myself on variations of religion and where there might be disagreements in the programming.

The temple for SH in its final iteration will be an open, interfaith space designed for public use. It will be perfect as an income opportunity to rent out for events like weddings and rites of passage.

### **Demographic**

Covid-19 has had a massive impact on the way we live and where we live. An article from June 2020 in Newsweek suggested that the virtual work boom has activated more workers and their companies to move away from metro areas (Bach, 2020). This means a flatter distribution of populations in small and mid-sized towns. This makes satellite locations for SH a little more difficult. Businesses used to guarantee profitability by locating in large metropolitan cities (New York, Miami, etc). This is no longer the case. Where SH might lose on large in-person satellites, it could win in small storefront places in Main Street, USA. There could be a viable option for franchising SH so that people in smaller areas can have access to the same services they would have otherwise needed to visit in larger cities. I would need to take great care in making sure that managers maintained high SH standards. On the flip side, allowing some creative freedom could reveal fascinating offerings.

### **Internal Scan**

### **Technological**

I plan to build SH's proprietary software myself. If I'm honest, I still don't know what's so proprietary about it, but I aim to find out! I know enough about data management to build something and test it. I've also had the idea to offer pieces of SH programming during phase one of my career plan to test it out. Testing what works and making improvements can start with a handful of clients I have now.

I will also need to educate myself on the emergence of artificial intelligence and data security. I find AI intriguing, so that's perfectly fine with me! Data security can be dry content matter. But I think I can overcome my boredom knowing that I'm building something I love. The same applies to managing HIPPA issues and researching equipment.

### **Government & Regulatory**

SH has two different government and regulatory components. One being the regulation of the building itself and the second of the activities taking place in it. I have an extensive background in community development. If I were to stay in Chicago, I would have a unique political advantage in obtaining space for the pilot. If I decide to move, I will still have a solid background for developing SH sites in other U.S. cities as they operate the same regardless of minor differences.

The programming will be a different matter. A few of the service offerings walk a thin line with medical licensing. I will need to find teammates in the medical field to collaborate with. My hair salon is a good example of collaboration. The salon specializes as a punk rock, LGBTQ friendly hair salon and color factory. The owner wanted to offer Botox as part of their esthetician services. They hired a doctor to carry the license for them and perform the services on certain days of the week while the rest of the staff continued their regular facials and massage. It brought

in a lot of new clients and very few clients complained about the Botox scheduling since they liked they could still get it all in one place.

### **Economic**

I am currently in no financial position to work on this project as I only work part time. This is something I addressed in the first phase of my work plan. I am using this time to bolster my personal finances and research what I will need to secure financing. I am likely to need a combination of investors and bank financing for the pilot program. I have great credit and decent savings. But after selling my home, I no longer have collateral for a large home. This is something I will need to work on before building the physical aspects of SH.

### **Sociocultural**

Being a middle-class Black woman has given me a unique perspective on issues of inclusivity. There is the obvious perspective of having to conform to white American society. But my own have also shunned me for being too white, spiritual, queer, and politically centric, among myriad other transgressions that are simply manifestations of my personality. The oscillation of being included and excluded gives me an edge in how I approach programming. I've leveraged this essential difference to win many grants and awards. It is certainly something I can do here as well.

I will need to improve my social networks. Personal struggles over the last two years have pushed me into a hermit state. I haven't been able to nurture my relationships where I used to in the past. My approach to networking needs to elevate so that I can build relationships with people who are more compatible with the person I've become and am aiming to be. I'm grateful

for the time I've had to keep to myself as some struggling relationships have been properly severed and I can curate a better network for myself.

### **Educational**

My educational background is quite diverse. My background touches Urban Planning, Economics, Communication Design, Interior Design, and now Human Consciousness and Transformative studies. I'm positive this background will help me with the creative and business aspects of my career plan. I can better negotiate the political aspects of this project better than many. And I can communicate with all kinds of contractors.

I worry I don't have the right educational background for the research laboratory component of this institution. If I decide to go for my PhD at a traditional university, it could delay the start of my project for years. I've also seen other virtual options such as Ubiquity University that offer a two-year program at only \$18,000. The accredited University boasts Ken Wilber as one of its chancellors and has a consciousness program that will give me the opportunity to continue to work on this project. I am leery of choosing this route because I do not know if the University's reputation is enough to open the right doors for me. I dreamed of attending an Ivy League but may not achieve both this project and PhD simultaneously. Attending in a traditional setting could put SH's development off by 5-7 years. I will have to do more research to figure out if I need yet another degree. And if I do, what path is best for me to take.

### **Professional**

I'm competent in a variety of business skills that I can build upon. I have the experience of running a web development company with two employees, three to four contractors and the

pressures of maintaining and renting office space. While I used to bemoan the fact that I had to quit the business, I'm now glad that I've had the experience, so I know about the coming challenges.

One of the primary reasons I quit the business was because I hadn't mastered the discipline, I needed to show up to work every day. I didn't have a problem doing the work. But some days I would be too tired, and I would have the employees work from home. This kind of inconsistency created a relaxed work environment that was too laid back to deliver what we promised. I often picked up the slack to deliver things to clients on time, and it was exhausting.

I've grown a great deal now. But I am going to monitor my habits to make sure that I am mastering the things I need to in order to bring my dreams to fruition. I am working on a morning ritual that includes meditation, prayer, breathwork, and exercise. My evening routine comprises setting an agenda for the next day, journaling, tea, and a hot shower or bath. My mid-day systems train me to focus on tasks that accomplish big goals. I also like to do something creative or some act of play every day. In a professional sense, these habits and systems create space that will allow me to take on new career challenges with ease. It is very important for me to feel prepared when new opportunities arise.

## **Religious**

My religious background gives me a level of respect for other traditions that are necessary for me to plan inclusive programming. Being raised African Methodist Episcopal (or A.M.E.), African and American traditions are part of worship. As the first granddaughter of a Baptist preacher who practiced many of these traditions, it has exposed me to all kinds of spiritual phenomenon. I also have excellent knowledge of how to conduct ceremony and rites of

passage. I know what it means to invoke certain presences, open and close space, and de-escalate a moment of spiritual crisis. This has also enabled me to embark on the practice of holotropic breathwork without fear or intimidation. The same goes for shamanic experiences. Because of this, I am very aware of the precautions that need to be taken for these practices to be integrated into SH's programming. Being keen on the different ways that spirit can manifest itself physically is important to me. Which is why the intrinsic value of SH's programming helps people to identify whether their affliction is physical, spiritual, or mental, then triage accordingly.

I would like to continue developing this skill set even more. More people every day are embarking on journeys like psychedelics, and ayahuasca without supervision and it makes them susceptible to all kinds of interference from non-friendly entities. I've even seen this happen with people who have simply combined the wrong kinds of weed and alcohol. Adverse side effects can devastate and be expensive to reverse. There needs to be more education around these substances, and I'm aiming to restore a sense of respect for them.

Last, I'm also exploring the possibility of ordination instead of a PhD. Not that they are the same. This is simply a question of the best use of my time and most conducive to my career path. One path takes me down the road to becoming an expert researcher. The other down a path of becoming an expert in spirituality. Until recently, I hadn't thought about this as an option. Though learning is a lifelong passion for me, I feel like I need a sense of closure to my academic journey. I'm seeing that either of these will accomplish that goal.

### **Market Analysis | Location**



I am doing extensive research on a move away from Chicago. Chicago is a wonderful place and I love it here. This city has everything going for it with a well-educated population, beautiful downtown, outstanding jobs market, and access to the Great Lakes. But I've written before that the city is much like a prodigy child with a penchant for self-sabotage. Even with all that, its leaders consistently make decisions that cramp the city's potential. I'm now feeling that cramp at a personal level. I've done as much as I could do to contribute to my community and to the city's economic growth as well. There's isn't much left to learn or to master here. I need to move on to another place so that I can stretch my capacity.

As my partner and I have settled on a California move, I am interested in cities along the coastline. Specifically, somewhere in Santa Barbara or the Ventura County area. These regions hold great promise for both our personal lives and our businesses. I know there's a great "California Exodus" to Texas. However, I have no interest in moving anywhere else in the continental U.S.

The net change for California's population in 2019 was approximately 80,000 people, which is only about two-tenths of 1% of the state's population (Fulton, 2021). As Fulton states, the housing prices are the primary reason for the exits. Luckily, neither my partner nor I am interested in purchasing a home. We are perfectly happy with renting, and the rent prices in our target areas are well within our budget.

I also did some research about the state of business in California, since this is also another reason that residents are fleeing the state. Oracle, HP, and Tesla are among the recent companies to re-locate. Tesla's CEO Elon Musk has been frustrated with the state's regulations for quite some time. And the Governor shutting down the car manufacturer's operation during the

pandemic was the last straw. HP and Oracle both cite cost of living as their reason for moving headquarters to Texas.

Comparing my business model to their models, I do not have the same concerns. I've insulated my business model against those regulatory concerns by remaining a service provider and not offering products. According to the National Conference of State Legislatures, the income taxes are about 5% higher than in Illinois. Minimum wage in California is \$12.00 an hour, three dollars lower than in Illinois, with a one-dollar step increase until \$15.00 in 2023. So, the cost of doing business would not change much from what I am accustomed to in Chicago.

After all this research, I am reminded of the "Chicago Exodus" between 2000 and 2018. 350,000 African Americans left the city for metro areas like Atlanta, Houston, Phoenix, and surrounding Chicago Suburbs, (Moore, 2020). Migration out of Chicago peaked during Rahm Emanuel's Mayoral run as Black citizens cited school closings, housing costs, and crime. I theorized at the time that these issues were the sub-text, but it was the GOP's campaign against Barack Obama that did most of the heavy lifting (St.Claire, 2018). Republicans pointed to the crime in Chicago as an indictment against Obama's capacity to lead, fueling a media obsession with Chicago's crime. The negative press demoralized citizens while the city of Atlanta courted the Black elite to enjoy affordable "McMansions" and decadent party-life in central Georgia.

Much like the Chicago Exodus, the California Exodus has real economic realities that need to be examined. Home prices are exorbitant and the taxes are high. But the political rhetoric of right-leaning politicians against blue-state regulations during the pandemic is fueling the fire. And media personalities like show host Joe Rogan are unwittingly courting people out of the Golden State.

All this to say, I'm aware of the movement, but I've become less rattled by recent migration patterns as they seem to be reflections of people hoping to escape challenges that look local but are largely national. I suspect that big tech moving out of the state means the local markets in California will correct themselves *because* big tech companies are leaving the state.

Bay area cities will become more like the mid-sized affordable towns they used to be, rather than the expensive behemoths they've been since the tech boom. But I will continue to keep a watchful eye on the situation as it develops over the next year. I spent a great deal of time on this portion of the research since this issue informs both my living and work prospects.

### **Target Market**

The Target Market for Sanahalili are those who need guidance for soul- and meaning-making, self-actualization and development, change, transition, or rites of passage. The overall market is likely 60% female, 40% male between the ages of 35 and 65, making \$75,000 or more per year. They are already conscious of their spiritual, mental, and physical health. They simply want a holistic, spiritual health program that is customized for them and their needs. See Appendix B.

### **Industry Type**

In the second phase, Sanahalili will offer spiritual advising that focuses on the mytho-poetic, auto-poetic, and passage stages of spiritual development. Modalities for healing are traditional coaching/advisement, energy healing, and Chinese medicine. The industry for my career is the health and wellness industry. I would define it as the Spiritual health industry. Since this is an emerging market, I will need to synthesize existing market research to get a clear

picture of the strengths, weaknesses, opportunities, and threats. These industries are health and wellness, mental health, and spiritual services.

The outlook on market opportunities look great! According to an Industry Analysis Report from Grandview Research, "the complementary and alternative medicine market size was valued at USD 82.27 billion in 2020 and is expected to expand at a compound annual growth rate (CGR) of 22.03% from 2021 to 2028" (Grandview, 2021).

I intend to leverage the current boom in the health and wellness field by finding a niche for myself where I can lay a foundation for my career over the coming years. The health and wellness industry is a broad category of people working in either individual or group basis to recover or sustain mental, physical, or spiritual health. Main participants in this industry include holistic, western doctors, traditional healers, coaches, therapists, and trainers. The primary customers of this industry are typically middle-and upper class knowledge workers whose initial priority is expanding their work productivity. However, that priority may shift to more esoteric concerns as they continue working with their practitioners.

Since the primary participants in this category are its service providers, suppliers defined here are those who supply the industry with the products the participants need to render their service. Suppliers can range widely from clothing manufacturers for yoga instructors to software engineers providing bespoke software to practitioners. They have little impact on the consulting aspect of my business in the first and second phases.

### **Trends in the industry**

According to the Global Health and Wellness Report of 2021, there are nine big trends to look for over the next 5 years. Of these, I find four to be most relevant to my path: breathwork, diversity in wellness, renaissance in self-care, and celebrity wellness.

Right now, health and wellness are popular. Downloads for health and wellness apps jumped 50% in 2020, largely because of the pandemic (Ballentine, et al., 2020). Though I sense, like any trend, it will wane soon. I project that the next three years will see a cooling in the mental and spiritual health industries as our lives recalibrate and only those true to the craft will remain. It would be most advantageous for me to move back into coaching while new markets are interested in these modalities.

I am currently completing the SOMA Breathwork Certification under Niraj Naik. I want to incorporate this as part of my first phase coaching practice. Adding my presence to the industry will bring another diverse voice to the healing arts. I'm looking forward to bringing a fun and chic approach to coaching and breathwork. But I don't want to aim my practice only for people of color. These are the two major ways I will take part in the trends to build the foundation of my career.

### **Competitive/Collaborative Analysis**

Competition in this area is steep since the barriers to entry are so low. I turned to the Ventura, CA business directory to find companies that list "spiritual healing" in their description. There are 20 businesses total. Of the 16 with working websites, four of them offered a similar range of services to SH.

The major competitor is the Ventura Center for Spiritual Living (VCSL). They are part of a larger organization called Centers for Spiritual Living. They offer free prayer service,

guidance, and spiritual education tools for people from all walks of life. Their offerings are completely free, which could be a major problem for my business model. The difference is SH will provide physical healing where VCSL does not. Along with a unique experience that a non-profit organization may not provide. I will have to visit to learn more about their service.

A second major competitor in the area is A Place of Peace. While they also do not provide physical healing modalities, they provide a wealth of services that indicate a holistic approach to spiritual health as well. Services include spiritual, relationship, and financial counseling, Tibetan Healing Bowls, Intuitive readings, and health products. They also have a registered nurse either on staff or under contract to sell products.

Here again, I would count on my brand and client experience would be the major differentiator for me. The other 15 service providers in the Ventura area specialize in Reiki, chakra healing, massage or tarot. But they don't combine physical and spiritual healing modalities.

From another perspective, I could collaborate with these companies. I had an idea that I could offer space to single service healers like tarot card readers and rent booth or office space to them while counting their service under SH offerings. I still believe this is a good income stream to include in my final business plan.

Collaboration with larger companies like VCSL would be more of a partnership model. Perhaps if someone they are working with needs Chinese medicine work, they could refer that client to SH and we could make a donation from a portion of the sales. There are many ways we could approach a partnership. Aside from this research, I am working closely with someone who

is helping me to get an accurate perspective using my NAICS and SIC codes. I hope to have these completed by early next quarter.

### **Mid-Term Goals and Strategies**

#### **Year 1**

My aim during this mid-term phase is to establish myself as a spiritual teacher, practitioner, and leader at the Transformance Group. I aim to create lucrative, engaging programming with my partner and the case of the company is to establish digital spaces and build simple, well-working systems.

In the past, I made the mistake of hiding or curbing my personal expression. I thought that my personality was too "woo-woo", odd, ethnic, and brash for other people to appreciate. I did my best to conform as much as possible to what I thought people expected of me. It stifled my creative expression. I had an incredibly tough time making even the smallest decisions, and it eventually led to burnout.

For that reason, it is important to me that my personal brand is *thoroughly* authentic to who I am. Though I am still concerned about the public's obsession with cancel culture, I've decided I would rather make less money than pretend to be someone else. Creating a digital and physical brand that reflects my true self is a top priority. It is equally important to me that Kevin does the same.

We will simultaneously work to build Transformance Group as company for courageous coaches and clients who are just as adventurous. There will be no need to pander to a politically or spiritually sensitive audience if we are clear this is not our target demographic. Making sure this

groundwork is in place before moving forward is a vital part of year one. In more detail, here are my strategies for year one.

### **Strategies**

A year is not very long to do all this work. However, I prefer tighter timelines for launching things. There's something powerful about focusing all that constricted energy in a particular direction. Keeping the timeline tight is a strategy.

I will make sure that I only focus on making the basics work extremely well. This means no expensive or overbearing systems. Nothing unnecessary. Just the bare minimum required to run the business so that we can identify any time or financial drains.

### **Benchmarks**

Month 1: Both partners have defined individual objectives and boundaries. A partnership operating agreement separates the romantic and professional relationships.

Month 2: Personal Brands, Websites (including functions), and social media accounts up and running. 2019 Taxes are complete and are handed off to Bench to complete 2020. We have an accountant.

Month 3: Branding exercises for Transformance Group. Integrating and canonizing our philosophies. Understanding what the company is, what we want it to do, and how to take it there.

Month 4: Branding Complete. Rules, Policies, Structures in place.

Month 5: Website Complete

Month 6: Operating cohesively as a unit and recruiting new coaches

Month 7-8: Monitoring, analyzing, and making adjustments to practices



Months 9-12: Enjoy fruits of labor and look at the next timeline of goals.

### **Budget**

The first year's budget is around \$300,000. Since Kevin is already working and vested in the company, his salary this year would be about \$180,000. Starting out, my salary this year would be about 70,000. The operating budget for the business outside our salaries is roughly \$50,000. This includes contracts for things like accounting, graphic design, and web software.

### **Year 2**

Building on the success of the previous year, I aim to capture program data, expanding our clientele and coach roster.

Transformance Group's programming will focus on the mythopoetic and change management for leaders and their organizations. I want to use the data session outcomes and other client interactions to build new offerings and research questions for SH. I will spend a good deal of the year building programs that capture this data without sacrificing the privacy of our clients or coaches. I imagine I would primarily be responsible for this aspect of our growth while Kevin grows our clientele.

One strategy for growth is to leverage our existing client base to up-level our network. Finding the deeply meaningful, engaging relationships we have and asking for referrals. I can think of a few off the top of my head who are a degree or two away from A-list celebrities. This, along with continuing speaking engagements, is a superb way for us to expand our client base or support networks.

I would also like to use this time to improve any kinks in our operations and processes to ensure things are running as smoothly as possible. By year two, the budget would likely double

to \$600,000. Kevin would be at \$225,000, my salary at \$110,000. The operating budget would about \$300k, leaving room for growth in our operating budget and salaries for contracted coaches.

### **Year 3**

By the third year, I look for to Transformance Group running like a well-oiled machine. Then, we would have settled in our new home on the West Coast. I hope that the economy is stable enough for us to have a working physical office space where coaches can choose to come in and work. Even though we've all been working remotely, having a physical space can be important for meetings between staff and for clients.

We can also begin building upon successes of Transformance by building support for SanaaHalili. As with year two, I don't feel confident enough to estimate short-term budgets or benchmarks since drastic changes can take place quickly in the external landscape.

## **Resources**

### **People**

The juiciest aspect of Sanahalili for me is the research institute. It is also the most challenging. I have absolute confidence that I could execute every other aspect of this plan tomorrow if I had the cash. But institutions can be incredibly difficult to sustain.

Knowing that, people's power is the most important resource. I will need to have good relationships with highly capable, well-connected friends and allies. I'm looking to develop deeper relationships with people in my network who are deep divergent thinkers, no matter what their career skill set might be. I believe in order to attract these kinds of thinkers to the project; I will need to be the same way myself. I already am, but I have a tendency to keep my thoughts

and feelings to myself. I will need to get in the practice of expressing my ideas publicly, which is an ongoing challenge for me.

As mentioned, I fortunately already have many interesting people in my network who would gladly want to contribute to the project.

### **Finances**

I will need about 6 or 7 million dollars to build the institution, depending on the rate of inflation. I'm not intimidated by this figure and am confident I can raise the money to start. Some will come from research grants, but people I know who would be interested in being part of such an innovative project will fund the bulk of it. I also have the added benefit of my partner and his network with the formulation of our new business ventures.

Currently, I have decent credits, an excellent work ethic, and a basic knowledge of financial systems. I need to learn more about emerging technologies and stay abreast of the coming changes. But I am gaining mastery with credit systems. This will be a valuable asset to me since I know how to be creative with financing. For businesses, there is vehicle and equipment financing, invoice financing, lines of credit, and real estate loans that will be critical. My biggest mistake in starting my first business was purchasing everything out right with my cash. Contrary to what I was taught growing up, this is not smart. I understand financing now and I see that as a major resource.

### **Insurance**

I know a couple people in the insurance industry and would certainly lean on them early on for support so that I can understand all the liabilities in the three aspects of the business model. There is not much liability in the temple or basic programming aspects. But the research

and healing modalities carry their obvious risks. I imagine insurance for the organization will be fairly expensive. But there's no way for me to even estimate it this early. We have basic business liability for Transformance and it is affordable at about \$100 per month. I imagine I will simply have to make adjustments as we move forward.

## **Marketing**

Marketing is something that I have mastered. Marketing gets me excited about this business. I have highly resourced in this area. I aim to make the marketing an ongoing, cutting edge experience. I don't like flat communication. Re-igniting magic and wonder in communication gets me out of bed in the morning. I want people to remember once again that magic is possible.

Creating experiential digital assets means that I invite people into the world that is in my head. I invite them in to play along with me so that there is healing transference. That's how I view marketing. People pay attention to the branded image, which makes sense. But to give those images depth, you also need to know what your brand smells like, feels like against the skin. What does it sound like? How do other people sense its presence if it cannot be seen? If corporations are people, then give them souls. And yes, I'm already working on a scent for SH.

There are other professionals that I know in my network who would love to build this world with me. I want to reach out to friends who are musicians, artists, curators, sound healers, and body workers. There is an evergreen list of ideas in my Evernote that I can't wait to deploy. The collaboration on these projects will be an incredible way for people to learn, grow, and be entertained!

## **Technology**

I am highly resourced in this area as well. I haven't done any coding or kept up with the new technologies over the last year or two. I will need to get back on that training. But I have enough to get started building the programs that I will need to build both the Transformance Group and Sanahalili.

Hardware is relatively inexpensive. It's the software that I will need help with financing. One idea I have is to franchise certain aspects of the business. To do that, the software needs to have its own unique intellectual property so I will need to hire a developer to encode that IP. That will cost a good deal of cash. It will mitigate the costs if I build a demo myself and then have someone (or company) build it to last.

### **Dwellings**

My current plan is to build a single pilot before building the big temple. I would not build any additional spaces until after both the pilot and the primary temple have proved self-sustainable and profitable.

In either case, I do not have access to free or affordable space right now. I am interested to see what happens over the next year in commercial real estate. It will either be exorbitant or dirt cheap. I don't imagine a scenario where it will be anything in between. I will have to wait until we find a collective level ground to make any projections here.

### **Information**

There is no shortage of information these days. I don't have *all* of what I need. But I know that I have access to it through very knowledgeable friends. I will most need access to library systems like Lexis Nexus, JSTOR, and other similar platforms.

### **Long-Term Goals and Strategies**

I don't have detailed benchmarks for long-term goals and strategies. However, my aim is for the Transformance Group to be a holding company that hosts courageous brands and programming for building powerful leaders. Sanaahalili will be Transformance Group's premier retreat and research facility. I look forward to having a physical presence for Sanaahalili by year five. Some basic form of the research facility should run by year six, while years 7 through 10 will be about growing and sustain its services.

### **Contingency**

The question of a contingency plan is awkward for me. Typically, if a business fails, then you start over or look for a job.

There isn't much to write about taking a job. I would fall back onto my marketing experience and find a work from home or flexible position that helps me to use those skills. If I am this far into my contingency plan, I would also have to assume that I am incredibly demoralized since the most rational thing to do would be to keep moving forward as a solo- or entrepreneur.

Continuing to try my hand at entrepreneurship would be the preferred scenario. The goal with TG is to make at least \$100k per year by Jan 2023. If this is not working, then I will look analyze what is and is not working about the business model and make necessary adjustments. I see myself downsizing my living arrangements or lifestyle long before I completely give up.

In another scenario, if my partner and I split because of differences in the romance or in the business, I would simply fall back on my spiritual advisement practice and push forward from there. I'm not adamant about never taking a traditional job again. But this would be my last resort. I believe this is the best thing about being an entrepreneur. There are always opportunities

to create and grow from whatever may be available to you. From my experience, contingency plans are more for isolated risks that a person takes in the business. For example, I would write a contingency plan for a financing idea or for a stream of income. Since none of those things exist for me just yet, this energy is better spent in the creation rather than possible destruction of the business.

## **Conclusion**

### **Questions**

As I've re-read this plan, I am wondering if SH and TG should be combined. They are very different products and services in some ways. In other ways they are very similar. I do not know if I may combine the two, but I'm open to it.

I'm also wondering if I should protect Sanaahalili from competition by leaning further into integrating a full medical or mental health facility. These aspects of the business model are downplayed to avoid regulatory interference for now. But I am curious to see if I gain more confidence in the future to find medical provisional who are willing to make a larger investment in the business model in the future.

### **Concerns**

I am confident in the relationship between my partner and me. Of course, there are always concerns about combining any number of people in a leadership role for a company. We've taken the time out to outline how we will arbitrate business disagreements now, before they occur. This way, when they come up, we already have an order of operations for resolving them. I know that a great deal of personal and leadership growth. Neither of us are fans of

confrontation. But we are working to make sure that we put that aside for the sake of our partnership in home and business.

Another concern is my mental health. I am working to overcome my propensity toward anxiety with a daily meditation and prayer practice. Keeping up with an ongoing morning devotion will keep unnecessary conflict at bay.

### **Considerations**

By 2022, I hope to be living a financially secure lifestyle in the Ventura County area of California. If not Ventura, then somewhere along the coast. I will spend that time building the Transformance Group with my partner for the next two years. By roughly 2025, I will establish a pilot storefront for Sanaahalili where I can collaborate with other practitioners to bring holistic healing under one roof. Once I've understood how the business works there, I hope to work on a second, larger location that will house the company's temple and laboratory.

I've already begun working toward many goals in this plan. For phase one, my website is already visible. Clients can easily book a session with me for a tarot or intuitive coaching session. My branding and messaging have also been re-tooled to reflect a more sophisticated approach to my work. The site address is [avastclaire.com](http://avastclaire.com). Meanwhile, my partner and I have scheduled team sessions with a graphic designer to write the copy for TG's website. Further, I am working on an illustrative business plan that will remain on a big screen in our home so that we both know where we are at all times. It will act as a digital vision board. That website should be live by the end of the year at [TransformedLeaders.com](http://TransformedLeaders.com). Finally, even though it is technically a phase three project, I am planning a virtual min-conference for Sanaahalili in October to gauge the public's interest in the content. That site address is [Sanaahalili.org](http://Sanaahalili.org).



The future looks bright and I'm very excited about my next chapter. Looking back to September 2018, I would have never thought I'd be where I am today. This is a big dream coming true for me. I can't wait to breathe life into it!

## Appendix A



## Appendix B

# INDUSTRY POSITIONING

All three phases focus on services, Products, and Research, that support:

**MYTHOPOESIS**  
Soul and meaning-making

**AUTOPOESIS**  
Self-actualization and development

**CHANGE**  
Change, transition, rites of passage

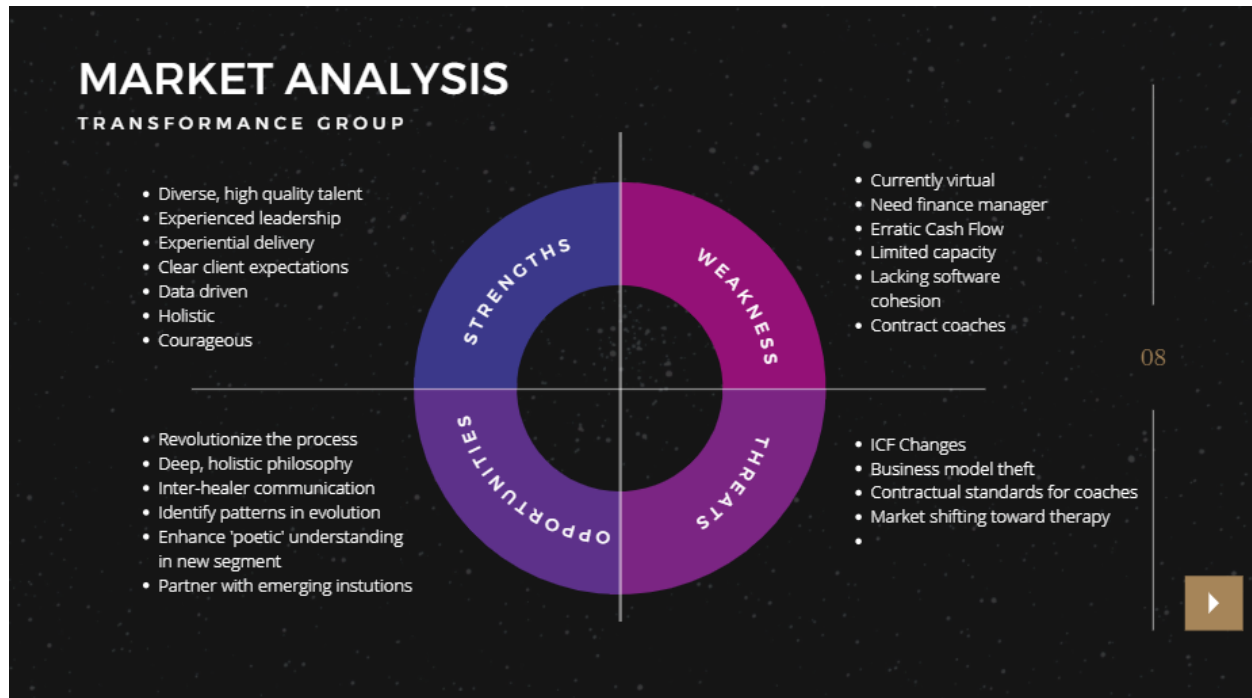


Aligned Personal mission, vision and values

07



## Appendix C



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