THE LIVED EXPERIENCE OF BEING A PEER LEADER OF MINDFULNESS-BASED INITIATIVES IN FINANCIAL SERVICES: AN INTERPRETATIVE PHENOMENOLOGICAL ANALYSIS

By

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Declaration

I hereby declare that this work to be entirely of my own accord and I have disclosed separately my responsible use of GenAI that supported this research. In addition, Grammarly was used for editing purposes.

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The lived experience of being a peer leader of mindfulness-based initiatives in financial services

Abstract

The financial services industry is a dynamic, fast-paced, and demanding environment. In this context, mindfulness has emerged as a practice aimed at managing work pressures and even improving performance. Many leading financial institutions, such as HSBC, Morgan Stanley, and BlackRock, offer mindfulness programs, often led by peers. However, critics argue that corporate mindfulness is an exercise of neoliberal power and lacks legitimacy. This research explores the lived experience of peers who lead mindfulness initiatives within financial services and examines how they make sense of their roles. It investigates how these leaders experience belonging and community through their initiatives. The study also examines how prevailing corporate narratives impact the legitimacy of such initiatives. Using interpretative phenomenological analysis, verbal data were collected from eight participants who have led or currently lead mindfulness programs at global financial institutions in London and New York. Three group experiential themes emerged: finding meaning, determination, and growth beyond formal roles; experiencing spaces that embody connectivity, inclusivity, and safety; and navigating the tension between authenticity and commercial realities. These themes show how being a mindfulness peer leader can personally and professionally transform lives, and that peer-led mindfulness offers spaces that help people to connect, build diversity and inclusion as well as psychological safety. It also highlights the conflicts peer leaders can face with running their initiatives. It has

implications for the contribution that peer-led mindfulness initiatives can make towards the achievement of institutional non-financial objectives, such as well-being and inclusion, and for peers' personal and professional development.

Keywords

Peer-led, Peer Support, Self-determination Theory, Identity Theory, Qualitative Research, Interpretative Phenomenological Analysis, Mindfulness, Financial Services, Mindfulness at Work, Belonging, Psychological Safety, Participatory Approach

Introduction

Background

Peer-led mindfulness initiatives are common across financial services. Initiatives like *Mindful on Wall Street* and the *Compassion in Finance Summits* also reflect its growing interest. This dissertation examines how peers experience leading mindfulness-based initiatives in the financial services industry. It explores how they experience belonging and community, and how corporate narratives influence their legitimacy.

Personal Relevance

I completed my mindfulness meditation teacher training in June 2019. During the training, I imagined creating a mindfulness space for fellow financial sector employees. Synchronously, a space arose and I grew the initiative across my institution. Two years earlier, I had completed yoga teacher training and felt a similar urge. After some time, my initiatives gained formal recognition. From there, I was offered leadership roles in well-being. This focus became central to my work, leading me to pursue the MSc.

Relevance to Transpersonal Psychology

This research views mindfulness as a relational practice. Whilst the epistemological assumptions of modern psychology have depicted an individual self, when construing a relational being, the potential to access a social field arises (Arístegui, 2021). Schlitz et al. (2007) described the circumstances when consciousness expands as transpersonal—where one's perspective shifts toward seeing oneself as

part of a greater whole. The individual *I* becomes *we*. Conscious transformation involves relationships between three levels: personal, interpersonal, and transpersonal (Welwood, 2000). Psychology and spirituality are therefore intricately related. This research then draws on self-determination and identity theories to explore how peer-led mindfulness in financial services enables transpersonal phenomena to arise.

Self-determination theory (SDT) is a theory of motivation that focuses on autonomy, competence, and relatedness as key elements of human behaviour (Deci & Ryan, 2000). SDT proposes that individuals and organisations thrive when employees feel supported in their autonomy. Competence means employees feel their work is important and effective. Relatedness develops when employees build meaningful relationships with others (Deci & Ryan, 2017). When individuals feel supported from an SDT perspective, they seek connection by joining social groups (Deci & Ryan, 2000). I propose that SDT could be an underlying basis for the empowerment of transpersonal phenomena through participatory processes in peer-led mindfulness.

Identity also relates to self-determination (Deci & Ryan, 2000). From an identity theory perspective, some theorists view social psychology as focused on *we* rather than *me* (Deaux, 2000). Identity theory explains how the self identifies with roles and group expectations (Stets & Burke, 2000) and social identity theory describes how identity is shaped by the social units individuals belong to, so the individual self shifts to the collective self (Brewer, 1991; Sedikides & Brewer, 2015). Stets & Burke (2000) argued that identity theory and social identity theory cannot be easily separated and should be merged. They suggested different psychological processes are occurring at different

levels—relating to the group, the role, and the person. For this purpose, references to identity theory and social identity theory hereinafter shall be to *Identity Theory* (IT). Although IT is not a transpersonal psychology per se, it overlaps when there is a shift in identity to others, as described by Schlitz et al. (2007).

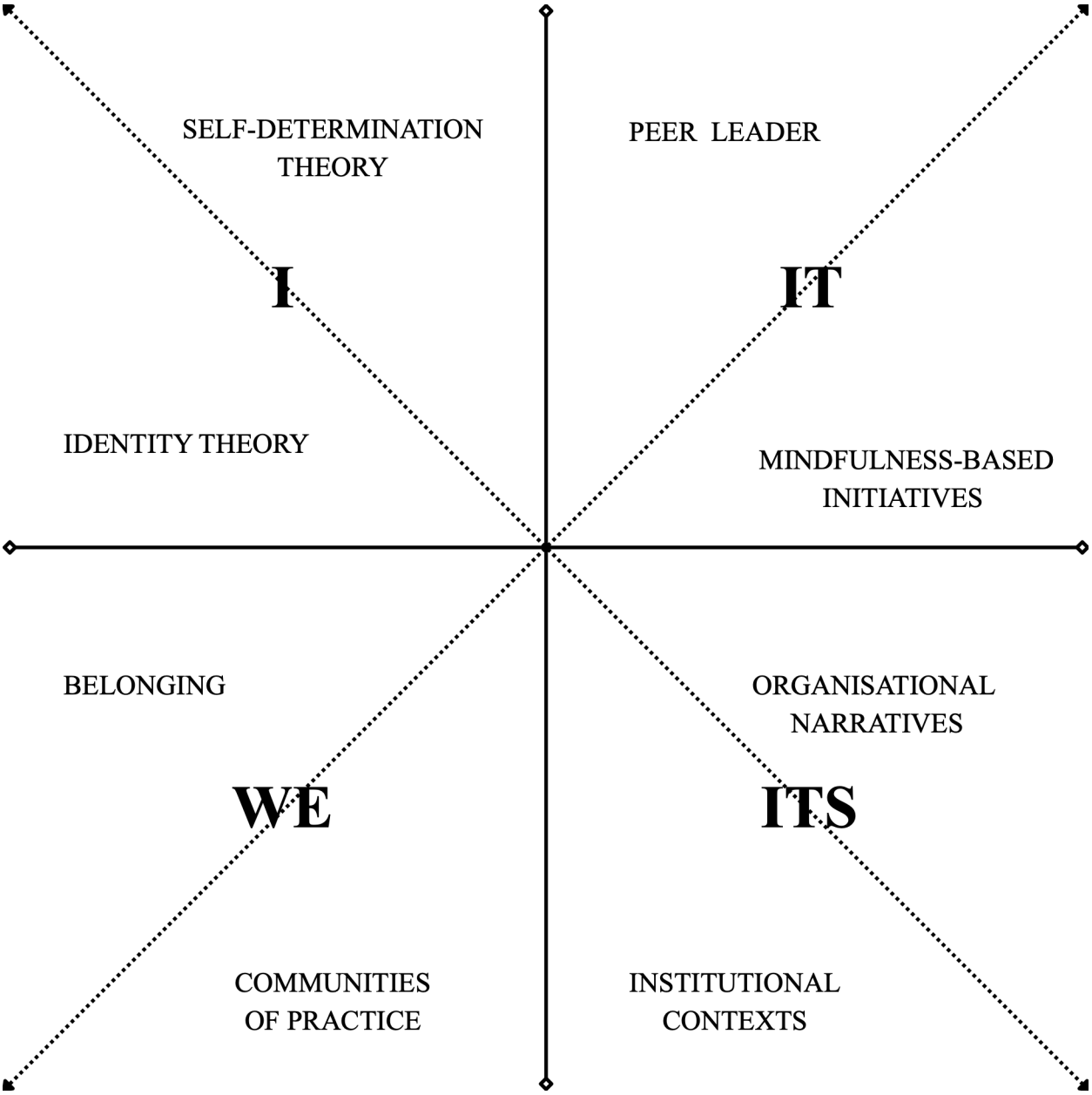
My approach to transpersonal psychology then recognises that understanding otherness is central to the lived experience of peer-led mindfulness. Wilber's AQAL framework describes otherness through intentional, behavioural, cultural, and social aspects, which are interconnected (Wilber, 1997; Wilber, 2017). These aspects can be divided further: the outer world (objective, empirical) and the inner world (subjective, interpretive). From this perspective, SDT and IT represent a peer leader's internal experience, while belonging and community reflect the cultural dimension, and organisational narratives and institutional contexts reflect the social aspect, as shown in Figure 1.

Jorge Ferrer's participatory approach also explicitly acknowledges the role of the *other* in the development of transpersonal theory (Fernando-Borsot, 2017). Transpersonal approaches are found in all aspects of ourselves, our relationships, our organisations, and society, and consist of multi-local events rather than inner experiences (Ferrer, 2002). In this context, peer-led mindfulness spaces are multi-local events which give rise to transpersonal phenomena through relatedness, which is also the basis of Fernando-Borsot's contribution to transpersonal theory through the lens of otherness (LoO) (Fernando-Borsot, 2017).

Accordingly, SDT and identity theory provide the theoretical lens through which to explore the lived experience of peer-led mindfulness in financial services. Wilber's AQAL theory offers an integrative framework for understanding its subjective, objective, cultural, and social aspects, whilst Ferrer's participatory approach and Fernando-Borsot's LoO offer a transpersonal perspective through which the relational and collective aspects of such lived experiences emerge. Each quadrant of Wilber's framework represents a portion of the phenomenon of peer-led mindfulness in financial services and cannot be easily separated. This research then bridges mainstream psychology, which focuses on human motivation and identity, and transpersonal psychology, which focuses on transformative participation in self and society.

Figure 1

Conceptual Framework for Understanding the Lived Experience of Peer-led Mindfulness in Financial Services



Literature Review

To situate peer-led mindfulness within financial services, it is first necessary to evaluate its current context. It is fast-paced, dynamic, and highly pressurised. Stress is a widely experienced phenomenon amongst financial services workers with workload, role ambiguity, aggressive sales targets, amongst other contributing factors (Kaur et al., 2024; Vogazianos et al., 2019). Situated in such challenging organisational environments, mindfulness practice gives rise to normative presumptions about its purpose and is not value-free (Walsh, 2016).

Mindfulness practice itself is a central tenet of Buddhist meditation (Bodhi, 2011). Mindfulness is defined as the awareness that arises through paying attention to each moment in a non-judging way (Kabat-Zinn, 2003). The definition of mindfulness within organisational settings is highly individualistic, centred around performance and well-being (Badham & King, 2019; Dane, 2010; Good et al., 2016). Specifically, Good et al. (2016) presented a systematic review of mindfulness in the workplace. Through attentional regulation, job performance, and relationships, well-being improved across several markers. They also suggested that mindfulness may improve interpersonal behaviour and workgroup relationships. Their research did, though, leave several open questions: whether mindfulness naturally leads to a more other-oriented orientation through leadership, psychological safety and team dynamics.

One qualitative study of mindfulness in the workplace, using interpretative phenomenological analysis (IPA), was conducted by Shonin and Gordon (2015) based on the experiences of 10 randomly selected employees participating in mindfulness-

based interventions. The findings showed that participants experienced changing attitudes toward work, improved job performance, shifts in their sense of self, greater spatial awareness, and improved well-being, as measured by improvements in stress, coping skills, psychological well-being, and spiritual growth. On the other hand, the highly specific inclusion criteria could limit the findings to other contexts (Shonin & Gordon, 2015, *Discussion*, para. 12). Although the authors acknowledge this was done to maximise sample homogeneity, the modern workforce today is largely heterogeneous.

There is nascent evidence of mindfulness and meditation being practised in financial services. Organisations such as Goldman Sachs, BlackRock, and the Bank of England have introduced mindfulness programs or seminars to their staff (Faugère, 2014). Mindfulness in finance is described as a practice that increases self-awareness and productivity (Faugère, 2014) and as a form of “mind technology in the financial market” (Ng, 2018, p. 2). Ray Dalio, the founder of Bridgewater Associates, one of the world’s largest hedge fund managers, stated that meditation is one of the biggest contributors to his professional success. It helps to cultivate creativity and manage the enormous stresses of running a successful financial services organisation (Saft, 2013). Philipp Hildebrand, Vice-Chairman at BlackRock, is quoted as describing the time spent in meditation as “a pause that refreshes” (Rathbone, 2013). Although this is only anecdotal evidence, the emerging narrative describes mindfulness in the same context as performance.

Purser (2018, 2019) characterised corporate mindfulness as a neoliberal project, where the resolution of stress within organisations is shifted from organisations to employees when the causes and conditions of that stress lie within organisations. Mindfulness is presented as an individual discourse: a means of responding to the pressures and challenges of societal living rather than addressing its collective causes (McNamee, 2021). Furthermore, corporate mindfulness has been accused of being an instrument of power that is used by corporations to mobilise employees' minds and improve productivity (Carvalho & Gracio, 2022). However, this critique assumes that an organisation *introduces* mindfulness as opposed to it *being* peer-led.

To the contrary, Leggett (2022) argued that whilst mindfulness tends to produce neo-liberal subjects, it also holds the potential for social and political transformation through reflective processes. Leggett also characterised mindfulness in the context of deliberative agency, which gives individual subjects the power to engage in reasoned decision-making and recognises the legitimacy of their values and those of others. Although described in the context of politics, such attributes suggest a wider-reaching potential. Any discussion of the legitimacy of peer leaders' actions in light of prevailing narratives about corporate mindfulness should be considered in this context.

The term *peer-led* is widely used in the literature, with a variety of terms describing such phenomena, including *peer supporters*, *peer facilitators*, *peer mentors, peer tutors, peer leaders, and peer-assisted learning,* particularly in education and healthcare. It is understood they are individuals with prior experience or knowledge on a particular subject who share common demographics assist others (Neuhaus, 2022). It rests on the

ability to relate to their peers in ways other interventions may not (Dennis, 2003). Such initiatives can be informal or more professionally organised (Doull et al., 2017).

Whilst there are benefits to peer-led interventions, there are potential adverse outcomes: peers being overly emotionally involved (Dennis, 2003; Doull et al., 2017), the reinforcement of poor behaviours, and the exploitation of peers as a substitute for professional services (Dennis, 2003). However, the benefits of peer-led interventions are based on “mutual identification, shared experience and sense of belonging” (Dennis, 2003, p. 326), which corresponds to any peer-led intervention grounded in equality and shared characteristics.

Recent research has also explored SDT-informed peer support interventions. SDT-informed peer support interventions may address basic psychological needs as well as promote positive health outcomes through cultivating a feeling of belonging and social connection, psychological safety, and supporting each other (Kritz et al., 2023; Mladen et al., 2026; Stenberg et al., 2022), all of which are consistent with the current literature in peer-led interventions, although none have explored the lived experience of peer leaders themselves.

Peer-assisted learning (PAL) is a specific type of peer-led intervention where knowledge and skill development amongst peers is on an equal or matched basis (Tamachi et al., 2018; Topping, 1996). Although originating in higher education, as Dennis (2003) described, it shares qualities such as openness and inclusivity, developing belonging and helping to build a community of practice (Bailey, 2021). Lave and Wenger (1991) set out the theoretical basis for how communities of practice

operate, in which skills and knowledge are developed through an integrated process known as *legitimate peripheral participation* (LLP). *Legitimate* relates to the opportunities for newcomers to participate in meaningful experiences. *Peripheral* describes the changing roles of an individual in a group learning environment, and *Participation* is the process of learning in which learners adopt new identities through meaningful activities. Wenger (1998) expanded on the notion of LLP, describing its effects on identity. Belonging to a community has a profound effect upon participants and "creates personal histories of becoming in the context of our communities." (p. 5) What is meant by *creating personal histories* is unclear. It could refer to meaning making and how community members made sense of their experience within communities of practice.

Although peer-led initiatives do not directly involve the leader receiving help, they may benefit from developing transferable skills and personal development (Topping, 1996). Scott and Doughty (2012) argued that peer support interventions involve an aspect of interdependence in relation to the responsibility peers assume when caring for others, which also involves autonomy and self-determination. Schwartz and Sendor (1999) found that the benefits of being a peer supporter through helping others include greater autonomy, self-esteem, life satisfaction, self-efficacy and personal growth. Although Schwartz and Sendor's study was situated in healthcare, the results were statistically significant compared to control groups, despite a small number of peer supporters sampled (n = 5) and potential selection bias. No correlation analysis was performed though with respect to whether autonomy itself was a motivating factor for providing peer support as opposed to being a benefit.

Colvin and Ashman (2010), using grounded theory methodology, found that peer mentors enjoyed helping and serving their fellow students. They also found the personal benefits of being a peer mentor, including integrating concepts learned into their personal lives and forging invaluable connections with peers. Note that in this study, peers undertook formal training through a mentor program, whereas many peer-led mindfulness initiatives operate informally. In addition, as Dennis (2003) reported, adverse consequences occurred when peer mentors felt vulnerable or placed themselves in situations that made them uncomfortable. This suggests that the lived experience of peer-led initiatives depends on how they are delivered.

Similarly, Shalaby and Agyapong (2020), through a systematic review of peer support in mental health, developed a conceptual framework where they found peer support workers benefiting from increased well-being and confidence, reframing of identity, the enhancement of responsibility toward themselves and peers and the professional growth that arises from such services. Although situated in mental health, if peer-led interventions are distinguished by a shared basis amongst equals (Dennis, 2003), then the transformation that peer support workers experienced could be transferable to other contexts. In higher education, Bailey (2021) examined participants' meaning making during their journey from student to peer leader and found that peer leaders experienced social connectedness, a sense of belonging, and personal development. That said, Bailey described the effect of peers mentoring lower-year students in an unfamiliar culture, and the formal adoption of responsibilities within an organised system, whereas peer-led mindfulness is often grassroots and operates in familiar institutional environments.

In another qualitative study using IPA in medical education appropriately titled "You understand that whole big situation they're in", Tamachi et al. (2018) found themes of egalitarianism and a closeness and bonding between tutors and students in PAL sessions. Although it was described as a "near-peer scheme" (p.2) (insofar as Year 4 students offered sessions to students in Years 3 to 5), it was the informal nature of the PAL that helped foster a sense of joint purpose and camaraderie. There was a shared understanding of what it was like to work in a highly pressurised medical environment (which is not unlike financial services), and the concept of *social congruence* was described, which involves authenticity in relationships with peers.

Bunting et al. (2012), using narrative inquiry in higher education, found that peer mentors made sense of their own learning process through self-observation and reflection. Being a peer mentor helped to build community and improve interpersonal skills, and their own development was enhanced by taking responsibility and actively participating in peer mentor learning. In another study using narrative inquiry, Bunting and Williams (2017), in similarly appropriately titled article: "Stories of transformation: using personal narrative to explore transformative experience among undergraduate peers", explored the meaning of four experienced peer mentors who provided academic support to other peers and used the concept of LLP as described by Lave and Wenger (1991) as a basis for informing the experience of being a peer mentor. Themes identified include finding meaning in experience, the potential for personal transformation in the right environment, personal growth that occurs whilst working with unfamiliar situations, and the value of working with and seeking support from other peer mentors. Although these initiatives took place in higher education, the emergent themes

suggest peer-led interventions enhance learning and development outcomes. However, similar to Colvin and Ashman (2010), these studies took place through more organised peer mentorship programs, which differ from typical peer-led mindfulness initiatives in financial services.

Peer-led mindfulness initiatives have been researched in numerous areas, such as addiction recovery (Fulton, 2025), adolescents (Jennings & Jennings, 2013), eating disorders (Kjeldstad et al., 2025), higher education (Ahmad et al., 2023), mental health (Wang et al., 2025), public health (Kerrigan et al., 2025), and medical education (Danilewitz et al., 2016; Moir et al., 2016; Wang et al., 2023). Such studies have generally demonstrated a positive relationship between peer support and well-being, although the field is still in its infancy, and results have been mixed owing to methodological limitations in research design and small sample sizes. Most studies have also been quantitative, focusing on psychological measures of health and well-being. Fulton (2025) conducted a qualitative study around peer-led mindfulness initiatives and addiction recovery, noting specifically how peer-led initiatives increased connectivity with clients and peer- found mindfulness practice was a way of connecting with other peers, although the sample size was small and the peers themselves had a natural disposition to mindfulness, potentially affecting whether the findings could be replicated.

The research in peer-led mindfulness initiatives is promising but under-researched, and little qualitative research has been conducted. There has also been no research to

date on peer-led mindfulness initiatives in financial services. The research addresses this gap:

What is the lived experience of being a peer leader of mindfulness-based initiatives in financial services?

How do peer leaders make sense of their role in leading mindfulness-based initiatives within financial services?

How do peer leaders experience belonging and community through peer-led mindfulness-based initiatives in financial services?

How do peer leaders experience and make sense of organisational narratives around corporate mindfulness, and how do these narratives shape the perceived legitimacy of their initiatives?

These questions address the individual and collective aspects of the lived experience of being a mindfulness peer leader in financial services.

Methodology

Research Design

The research adopted a constructivist ontology insofar as the experience of peer-led mindfulness creates relational fields and an interpretivist epistemology, as co-created between the interviewer and participants and reflexively interpreted. Constructivism acknowledges that meaning and reality are subjective and are interpreted through different experiences and participants' accounts (Creswell & Poth, 2025). Constructivist philosophy is well-suited to this study, as the lived experiences of peer leaders may vary and are contextualised by individual experience. IPA was chosen as the research methodology. IPA explores how participants experience and make sense of the world (Eatough & Smith, 2017). IPA is well suited to the research objective as it involves taking homogeneous samples, which permit the analysis of convergences and divergences amongst participants (Smith et al., 2022). IPA involves a double hermeneutic: the participants' experience and the researcher's interpretation of it. IPA permitted an in-depth exploration of the phenomenon of peer-led mindfulness within the homogeneous context of financial services, and of how participants’ experiences aligned and differed among themselves and across institutions.

Sampling Strategy

Participants were initially drawn from my existing peer network of fellow mindfulness peer leads at other global financial institutions. Because of its idiographic nature, a small sample size is recommended for IPA studies (Smith et al., 2022). Eight

participants participated in the research. A combination of purposive and snowball sampling strategies was used to recruit the participants. Purposive sampling strategies are “non-random ways of ensuring that particular cases within a sampling universe are represented in the final sample of a project” (Robinson, 2014, p. 32). As I already had a network of peer-mindfulness leads at other financial institutions, a purposive sampling strategy seemed the most appropriate. Snowballing strategies involve seeking referrals from participants who may be interested in the study (Robinson, 2014). A referral from a potential participant led me to successfully recruit another individual for the study.

The participants were recruited from several globally active financial institutions in London and New York that are leading (or have led) group-based, peer-led mindfulness-based initiatives within another financial services organisation for at least one year and had a personal mindfulness practice. I excluded peer leaders from my own institution to reduce the risk of bias and to maintain an ethical basis. Five participants were still leading peer-led mindfulness initiatives, and three had subsequently left their institutions. In addition, I utilised LinkedIn by searching for *mindfulness champions*, which yielded two participants. An overview of the participants (with pseudonyms provided) is included, as shown in Table 1.

Table 1

Participants

Pseudonym	**Age (years)**	**Role**
Sam	50	Manager
Terry	34	Manager
Drew	28	IT Professional
Robin	46	Investments Specialist
Alex	66	Trader
Jamie	42	Senior Executive
Chris	54	IT Professional
Patricia	44	Banker

Procedure & Interview

Ethical approval was obtained from the Alef Trust Ethics Committee. Several ethical considerations aligned with the norms of transpersonal research, including informed consent (which continued for 2 weeks after each interview) and upholding duties of confidentiality (Geldenhuys, 2019). It was also made clear to participants that an exception to the duty of confidentiality may arise if a participant inadvertently makes a disclosure in breach of an organisation's policies (that I was aware of).

A semi-structured interview protocol was followed. Each interview lasted between 48 and 90 minutes. Eight substantive questions were asked during the interview (Appendix D) with prompts and opportunities to reflect and follow up. The questions themselves were arrived at from the perspective of the participants' lived experience: from an intra-personal, inter-personal and supra-personal level, aligning with the order of the sub-research questions: exploring meaning making, belonging and community, and making sense of organisational narratives and legitimacy. This framework allowed for the inductive nature of the research and the interconnectedness of the themes to emerge, positioning agency within community in contrast to power and subjectivity.

Analysis

The eight interviews were analysed using a six-stage process as suggested by Smith et al. (2022). The first stage consisted of listening to and reviewing each transcript for accuracy. I used OtterAI to transcribe most participants' interviews where consent was granted. In the second stage, I imported each transcript into an Excel file

and took notes on each segment of data, capturing its descriptive, semantic, and conceptual aspects, staying as close to the data as possible. Using OtterAI's rewind functionality enabled me to take more effective notes on each segment of data by listening and re-listening to each segment multiple times.

The third stage consisted of developing experiential statements (ES). The goal of developing ES is to interpret what the participant is experiencing, the phenomenon or how they are making sense of their experience (Smith et al., 2022). ES were developed by reviewing notes from the second stage and the original transcript to interpret what the participant was experiencing and/or how they were making sense of it (see Appendix E). The fourth stage involved clustering each participant's ES (which had common characteristics) into separate Excel tabs, and the fifth stage involved organising those clusters into personal experiential themes (PET) with related sub-themes for each participant, as shown in Table 2.

Table 2

Participant Experiential Statements & Personal Experiential Themes

Participant	No. of ES	No. of PETs	No. of PET Sub-Themes
Sam	73	7	35
Patricia	58	9	26
Terry	55	15	36
Robin	37	12	22
Alex	70	10	31
Drew	91	15	54
Jamie	24	9	17
Chris	77	7	36

The sixth step involved performing a cross-case analysis of all participants to identify patterns of convergence and divergence. I created a table that mapped each participant's PETs to each sub-research question and identified similar PETs across

participants (see Appendix F). I clustered these PETs into a separate file and identified several sub-themes, which I interpreted as yielding three Group Experiential Themes (GET) (see Appendix G). To complete the analysis, I created another table noting similarities and differences among participants with supporting ES and quotations for each GET (see Appendix H).

Research Quality, Rigour and Reflexivity

Research quality was addressed through demonstrating characteristics of good qualitative research, including commitment and rigour, transparency, coherence and impact and importance (Yardley, 2000). Commitment and rigour were established through sustained engagement with the topic over several months to arrive at the appropriate research question, both in my capacity as a researcher and as a peer leader. The research involved semi-structured interviews with eight peer leaders who currently lead or have led peer-led mindfulness within financial services. The transcripts were listened to and read repeatedly throughout the process to ensure transcription accuracy and full immersion in the data. A six-stage IPA process was carried out, resulting in 485 experiential statements, 84 PETs and three GETs, which were based on participants' lived experience whilst still aligned with IPA's idiographic focus. Transparency and coherence were established through the maintenance of a clear audit trail demonstrating how themes were derived from the analytical process. Coherence was established through an alignment of the constructivist ontological and interpretivist epistemological assumptions with the selection of IPA as the research methodology to answer the research question relating to lived experience of peer leaders.

Reflexivity is the continual self-awareness and evaluation of all the dynamics involved in the research (Finlay, 2002). Since the use of IPA results in a double hermeneutic, the researcher is both on the inside and outside of the research, enabling them to consciously compare and contrast the researcher's experience with that of the participants (Goldspink & Engward, 2019). Smith et al. (2022) noted that it is common for the IPA researcher to be part of the community that is the focal point for the research and that, when it comes to studying phenomenology, it should “connect with our everyday experience” (p. 27). After each interview, I kept a journal, reflecting on each participant's experience. This enabled me to more clearly delineate my own experience from the emerging semantic and latent themes. Goldspink and Engward (2019) described the process of journalling in a similar manner, using participants' perspectives to challenge the researcher’s thinking and to stay close to the data. For example, my conversation with Alex challenged me to think about the different ways of delivering peer-led mindfulness and how such lived experience serves as a heuristic (see Appendix I).

Finally, the study enriches the understanding of the phenomenon of peer-led mindfulness in organisations. It contributes to understanding how peer-led phenomena can support organisational well-being strategies and non-financial objectives such as diversity and inclusion. It also contributes to transpersonal psychology research through suggesting how peer-led interventions could be another form of participatory knowing within organisations.

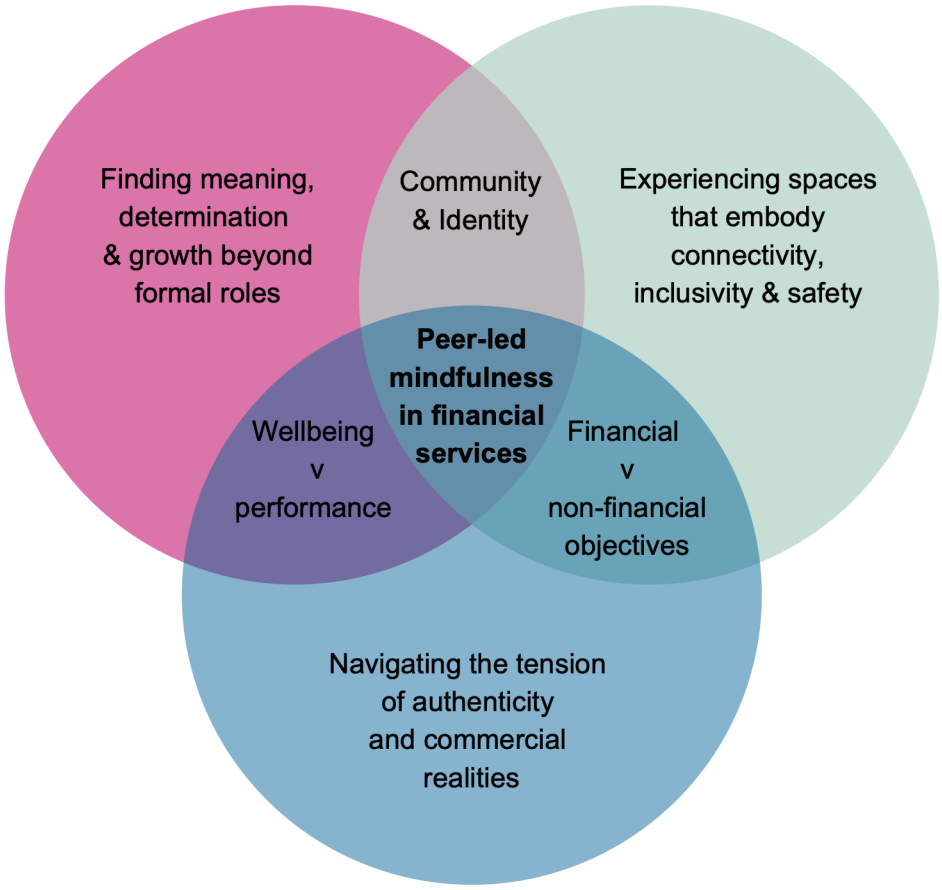
Findings

Through an interpretative phenomenological analysis of participants' personal experiences of leading peer-led mindfulness initiatives within their respective institutions, three GETs were identified, each corresponding to the three sub-research questions. Each GET is supported by participants' accounts of their personal experience. The first GET primarily addresses meaning making as a peer leader (GET 1). The second GET describes their experiences of belonging and community (GET 2) and the third GET describes how peer leaders made sense of organisational narratives and their perceived legitimacy (GET 3).

The GETs overlap, recognising the complexity of lived experience. Identity appears as an aspect of determination (GET 1) and through communities of practice (GET 2). Peer-leaders contributed to achieving institutions' non-financial objectives (GET 2), yet they also experienced tension regarding perceptions of an institution's financial objectives (GET 3). Likewise, participants found meaning and purpose in helping peers with their well-being (GET 1), yet for some, this was also an aspect that conflicted with the perceived legitimacy of their initiatives when viewed through the lens of performance (GET 3), as shown in Figure 2.

Figure 2

The lived experience of being a peer leader of mindfulness-based initiatives in financial services



GET 1: Finding meaning, determination and growth beyond formal roles

All participants expressed how much they gained both personally and professionally through their peer-led mindfulness role. There was a sense of finding meaning and purpose, of being a conduit for change, and the growth they attained. To Terry, it brought “a real sense of purpose, a real sense of, you know, connection and community” (line 615) and with that, a level of “inherent accountability” (line 427) to her personal practice. Sam specifically felt she was doing something revolutionary that could change the way things are done in financial services and for the good of society:

> Seeing people get the value out of it, the feedback that I get, it's so satisfying, and also being in a role now that is groundbreaking. We're doing things that have never been done before, and people are starting to see, wow, you know, if we were all mindful, just what would the world would be like? (lines 131–133)

Emphasising the broad-ranging impact of the personal experience of being a peer leader, Sam indicates that it is not just about personal satisfaction but also its enormous potential. The use of the word “wow” has a certain transpersonal quality, akin to the experience of wonder and awe. It was through making an impact that gave Sam a sense of meaning and purpose:

> Yeah, and we all need a bit of meaning. Without it, you know there’s something missing. And that’s what was missing before I started mindfulness. I found some meaning, even if my job wasn’t giving me a lot of meaning. (lines 412–414)

Sam's reflection suggests that the job she was employed to do lacked meaning, but being a mindfulness champion fulfilled it, which supports the paradoxical nature of finding meaning and purpose in work through activities performed outside one's main role.

Alex's account provided a similar story. He saw himself as a *vehicle*, as if he had been gifted special powers. He described the "change that could be made through this person [with] me as being the vehicle." (lines 202–203) Like Sam, being a peer leader was about finding meaning and purpose beyond the ordinary day job: he noted that he "saw [it] as very useful diversion from, you know, a job, job, you know, this is your job, but this wasn't a job. This was, this is like a purpose." (lines 578–579)

The way Alex describes being a mindfulness peer leader as a "useful diversion" from his day job suggests that it gave him a sense of autonomy, enabling him to find his purpose. Jamie also expressed a similar idea: that her work was about carrying forth the talents she had to help others and involved a sense of grace. In a discussion about what it means to be a peer leader, Jamie responded:

> Personal and humbling, and it reaffirms the practice itself, right, that, like you were just there as a vessel, and you just trust the practice itself for, for what it does, that you're just one of the doors. (lines 236–238)

Similar to Alex's experience, the vivid metaphor of being "just one of the doors" suggests a revolving experience in which she steps into the scene of delivering a peer-led mindfulness session and allows the practice *itself* to do its work through her. Jamie

elaborates further on what it is specifically like to deliver peer-led mindfulness sessions within a finance community:

> And then you start teaching within your own community or your own whatever workplace, and you're like, this is so there's an ease to it. I speak their language. I know what their concerns are like. They feel like I'm reading their mind because I am, I was, or I am, or I can I am in their shoes, right? And so it was deeply rewarding to be able to find your place, you know, in between two worlds. And like, know that it doesn't have to be separate, right? (lines 246–251)

The dissolution of boundaries, from being an external contractor delivering services *to* employees to *being* a colleague delivering services, noting the vivid description of being “in their shoes”, suggests that making a significant impact through being a peer leader is about the familiarity of what colleagues are experiencing, fostering a deeper sense of connection.

Like Alex and Sam, Drew also found meaning and purpose in her work, which led to her personal and professional growth. When asked about how important her peer-led work was, she responded:

> It's so important to me? I mean, I will say, when I look back on my career, some of my biggest highlights have been related to mindfulness … like, wow, we've really brought like, meditation to Wall Street. Like, what an incredible, you know, what an incredible feat. (lines 176–184)

As with Sam, Drew uses the word “wow” to emphasise the impact she made after leading a meditation session at a finance conference in New York and the occasion's memorability. Personal development also arose through a commitment to role-modelling her practice: “I need to constantly remind myself to, like, practice what we preach and make sure I, you know, focus in on these learnings myself.” (lines 236–238) Growth was not just about significant moments in her career, but also about her commitment to her practice as a way to maintain connection with her community.

To Terry, personal and professional growth meant she was able to extend her peer-led skills to other areas: “I'd done mindfulness with brownies and guides before, and in part, that was because of the peer learning allowing me to transfer into other spaces I occupy.” (lines 596–598) The stark contrast—between mindfulness with brownies and mindfulness in finance, yet they share a common thread.

Yet to Patricia, professional growth meant something different: Her personal mindfulness practice enabled her to extend her career in financial services and to help others. When asked to reflect on how she made sense of the whole phenomenon of mindfulness within finance, Patricia responded:

> it allowed me to probably stay longer in finance than I would have, because, yes, I think it's a job that, you know, if not handled and balanced appropriately, yeah, it does lead to a lot of burnout and, you know, frustrations and everything, I think it does help put into perspective, yeah, what you can do, how you can help other people, etc. So, I think, yeah, it probably retained me [reflective laugh] more than I

thought I would stay, and getting to know a lot of great people as well. (lines 595-600)

Patricia's response is rich in detail and nuance, with the reflective laugh, around being *retained* in the industry; the irony of mindfulness practice enslaving her, but from a well-being perspective, enabled her to sustain the pressure of working long hours and under high levels of stress. Yet, there is more. Like the other participants, her peer-led mindfulness work focused on helping others and connecting with like-minded people, as seen in GET 2.

GET 2: Experiencing spaces that embody connectivity, inclusivity and safety

The *feeling* of connection was how peer leaders experienced belonging and community through peer-led mindfulness spaces. Sam noted that "it's a wonderful feeling, like you feel like part of something that's, you know, connected." (lines 228–229) To Drew, seeing how her peer-led mindfulness initiative had grown across the institution was "so energising, and just makes me want to continue to, you know, be more involved" (lines 333–334) whilst Jamie described the fulfilling feeling of connecting on a visceral level "with real hearts, real nervous systems, etc." (line 172) It suggests that the feeling of connection became embodied in the peer leaders' work and was a source of intrinsic motivation.

Belonging and community also started to emerge through spaces that connected people across divisions. Terry, reflecting on her work, noted that:

> I think a lot of what I did wasn't always that I was bringing people [together]. So, it [was] kind of building a community of people who then know each other, and then they know each other through a very different angle than having just met through a work thing. They haven't just, I don't know, met on an audit meeting. (lines 634–637)

Terry's account suggests that peer-led mindfulness spaces are not just about bringing people together. To her, it was about building a community of people across the organisation who otherwise would not have met. As Terry noted, people are always connecting with others every day in work settings, such as in an "audit meeting", yet that is an extension of a familiar corporate environment. Peer-led mindfulness spaces build inclusivity in a different way.

In these peer-led mindfulness spaces, a new sense of identity also emerges. As Terry also reflected, "so, yeah, my job, I did it in a mindful way. I think it might even say at the top of my CV, like a mindful risk and governance professional" (lines 258–260), and people knew her as "that mindfulness girl". (line 270) Her work as a mindfulness champion became a badge of honour, where she embodied mindfulness in her daily work, helping to build bridges across the institution. To Jamie, identifying with being a mindfulness practitioner supported her career and inspired others: "my career helps actually build audience and curiosity to try." (lines 278–279) The suggestion is that the novelty of being a mindfulness practitioner in financial services had an inclusive effect by sparking curiosity among fellow employees and, consequently, bringing people together.

As in Alex's story, both Chris and Terry noted that this sense of belonging cultivated a sense of safety. Terry remarked that people “feel safe and comfortable” (line 873), and Chris noted that “historically, people feel comfortable coming to me with questions for advice” (lines 114–115), and his goal with peer-led mindfulness was to create “biological communion” (lines 57, 122) and “psychological safety” (lines 58, 232). There was a sense of relating to others through his teachings, where he made his mindfulness lessons relevant to what was happening at the institution at the time. When asked what is different about doing peer-led mindfulness in a bank, he responded:

> I would say the way it is different is that I'm purposefully trying to tap into what I know is going on for people at that time … So, I'm trying to tap into the rhythms of [the institution]. And doing lessons about how to be present within that. (lines 221–227)

Chris’s quote is like Jamie's experience, through speaking the same language as peers. It’s about relating to others through a common background which builds a sense of safety. Like Terry, Jamie also noted that mindfulness became the medium through which women in the organisation were able to deepen their connections. Mindfulness became the lubricant which enabled diversity and inclusion to be experienced on a deeper level: “they're just, you know, these women that like seek to support each other anyways, right? So, they've developed a great network anyways, and then using this [mindfulness] to kind of further connect, right?” (lines, 358–359)

Yet for others, such as Robin and Patricia, connection was felt through being with *like-minded* individuals. Being able to connect with peers of a similar background gave them an enormous sense of joy, knowing they were part of a movement trying to instil a different way of working in financial services. To Robin, COVID was a special time where “it was great to talk to like-minded people” (lines 243–244), and to Patricia, the consistent feeling of being with like-minded people was “heartwarming” (lines 268, 276), suggesting that the commonality of being mindfulness practitioners within financial services gave a special tone to that feeling. There were also times when the frustration of not being able to connect with peers or build the kind of community they’d have liked. Robin recalled:

> maybe that's the thing why it was not so satisfying, I'm not sure if there was as much as community I was hoping for. I was the guy in front and I'm sure I should have done this maybe differently I would probably do it differently nowadays. I was the guy in front I was giving a little Dharma talk then I would lead them through this and then they would leave. (lines 234–238)

Robin’s desire for reciprocity in his peer-led mindfulness reveals what he craved: to teach others what he had learnt about mindfulness. When that connection didn’t arise, a feeling of emptiness emerged. Although belonging emerged from being identified with the peer group he ran with, he also felt belonging when he spent time with peers at other institutions, suggesting that connection is felt where there are common characteristics amongst the group. Robin remarked:

> I mean I was that guy right I was the [name withheld] guy and so there was like there was a sense of belonging to that…and oh and then for sure when we when I met the other people and restarted [name withheld] I think that started a sense of belonging. (lines 315–320)

As Robin recalls during the interview (whilst looking up towards the ceiling), as if just magically popping into his mind: “Oh, and then for sure”, what belonging *really* meant to him was connection amongst like-minded people doing something unique with mindfulness in financial services.

GET 3: Navigating authenticity and commercial realities

The third theme captures the inherent tension participants experienced as peer leaders. Linked to the first theme, participants expressed a desire to help others, make a significant impact, and improve the financial sector. Chris’s comments summarise the view of the participants beautifully:

> I just want to help and provide people, whether they come there and gravitate towards the sitting with colleagues, or that they get to meet other people, just providing a space where they feel safe, psychologically safe. (lines 120–122)

It suggests a bare intention without an agenda. Almost pure in some sense, which is rare in inherently political corporate environments. Whilst also wanting to help others, Terry expressed it quite frankly: there has “to be some benefit for them trying to do something, even if it is a little bit muck.” (lines 900–901), suggesting mindfulness’s latent potential to help make better workplaces. Yet there was also a recognition that

mindfulness at work and performance need to be seen in the same context. Sam wanted people to perform at their best: “our purpose that we have as a mindfulness program is to help people be at their best, to create those conditions, and that’s where we’re, we’re trying to do. And who doesn’t want to be at their best?” (lines, 183–185)

Sam’s statement appears logical: if people perform at their best, it aligns with an organisation's objectives. Yet Sam also acknowledges the limits of peer-led mindfulness initiatives, and it’s not a “magic cure” (line 357). Terry went further, insisting that mindfulness does not reduce her stress and that, if “mindfulness fixes stress, everyone would be less stressed.” (line 968–969) Similar to Sam, mindfulness was about enabling others to become more aware of the causes and conditions that give rise to their stress, and she led peer-led mindfulness because she “wanted [name withheld] to become a more mindful institution” (lines 358–359), which has a certain idealistic tone. Yet for Chris, there was a perceived limit to organisational mindfulness. Chris noted:

> I think that’s hard, I think, for the bank right under [name withheld] leadership, where constant restructuring, constant selling off and consolidating businesses which are all working right to a degree that I think it’s a hard message for any company to make mindfulness on par with business goals. (lines 469–472)

Which brings it back to Sam and Terry’s view. Mindfulness helps to create greater awareness, enabling people to be at their best. But what happens when the nature of working in a large organisation means uncertainty in the face of potential redundancies? To Patricia, the goal of having a more mindful financial system ran up against the perceived barrier of the strong monetary reward system within banking: “I think the

whole system, the financial system, would benefit for having more people who were operating this way. But, yeah, I guess people have been rewarded also in the past, for just more like the monetary production." (lines 330–332) Like Sam and Terry, Patricia appeared to be a visionary with her utopian hope that "the whole system" could be more mindful, reconciling against the reality of working in financial services. This truly highlights the challenges the peer leaders had to grapple with in their peer-led work.

Alex's position was much clearer: mindfulness would only succeed if it was linked to financial performance, and then people would buy into it. Citing one of the world's biggest hedge fund managers, Alex noted:

> Well, if most of the sports world, Ray Dalio and some of the biggest brains on the planet are all doing meditation and something to enhance their performance, then walking into the trading world with that context does make people look at it a little bit more seriously. (lines 290–292)

Alex's comment suggests that mindfulness will only be sustainable within organisations if it is aligned with corporate objectives, which has a certain McMindfulness tone to it. At the same time, whilst acknowledging the McMindfulness critique, Alex's view was that, because he was helping others in such a profound way, any charges or criticisms of the ethics of his work had little merit. He was changing lives, which could only be a positive thing. In response to being asked about whether his work was really mindfulness, he responded very strongly: "I don't care what you call it. It's the people." (line 739) Robin also responded similarly when asked whether the work he was doing could be criticised for lacking authenticity.

> I feel like that's kind of like it's a little bit like or a lack of critical thinking of something that's actually positive. Is that it feels to me in the same, it falls to me in the same category as like I don't know the tech companies giving their employees free healthy food and the critics come and say well that's just so that they don't leave the building yeah maybe but it's still free healthy food and so it's awesome it's better than them giving them I don't know discounted unhealthy food. (lines 387–392)

Whilst Robin also acknowledges the McMindfulness criticism (“yeah maybe”), helping employees in some small way could only be beneficial from his perspective, which is similar to Terry’s view. Yet at the same time, Jamie expressed a little bit of frustration with the work of being a peer leader. Organisations are very happy to support these initiatives, or even feature them in their promotional campaigns, but aren’t willing to properly fund them. Jamie noted that:

> So I think it integrates, well, like we're featured on our [name withheld] now, even though they don't spend $1 on us. So maybe that's the eye roll, like, okay, you appreciate our existence and you know you're supportive, but not enough to give us a budget, but enough to feature us on [name withheld]. You know? (lines, 393–396)

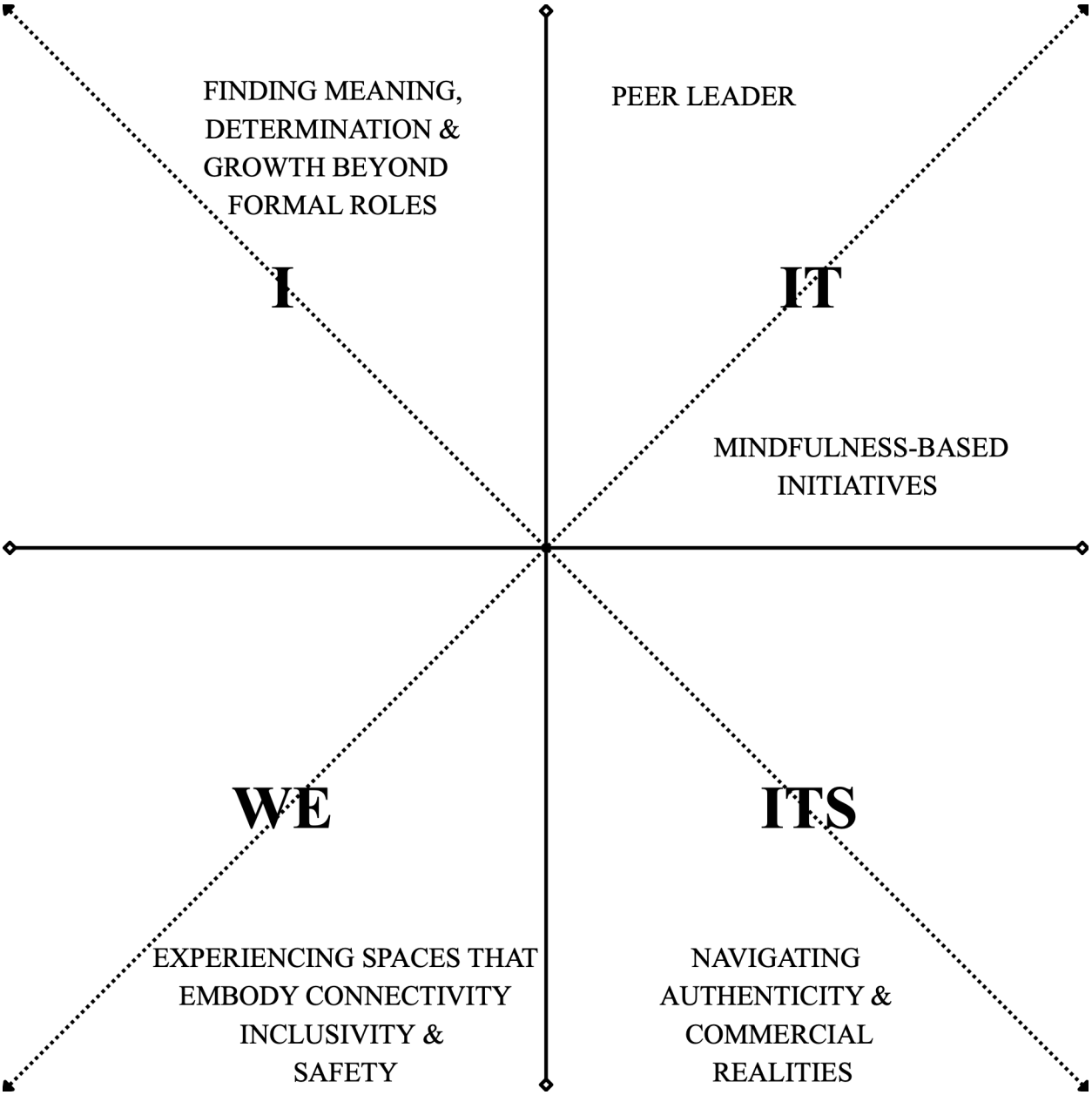
The cynicism of Jamie’s remarks is plain to see and highlights the tensions peers had to navigate as they strove to be authentic while facing the commercial realities of working in large financial institutions.

Discussion

The aim of this research was to understand how peer leaders make sense of their experience of leading mindfulness-based initiatives in financial services. Three GETs were inductively developed: finding meaning, determination, and growth beyond formal roles; experiencing spaces that embody connectivity, inclusivity, and safety; and navigating the tension between authenticity and commercial realities. The findings are seen through the lens of SDT and IT. Wilber's AQAL framework is used to illustrate the intricate diversity of the experience of peer leaders across individual and collective dimensions, as shown in Figure 3. Ferrer's participatory approach and Fernando-Borsot's LoO are applied to interpret the findings from a transpersonal perspective.

Figure 3

Group Experiential Themes and Wilber's AQAL Framework



Participants experienced a form of participatory knowing as peer leaders which I suggest was enabled through being intrinsically motivated. Their work as a peer leader, beside their functional role had a motivating effect. To be agents of change, make a significant impact and wanting to create a more mindful financial system. In doing so, they found meaning and purpose. For Sam, she found meaning and her career was reborn and for Alex, discovering purpose was transformational. For Terry and Drew, it was about the skills they developed through their peer-led work and the sense of nostalgia it evoked. This aligns with the findings of Bunting et al. (2012), Bunting and Williams (2017), and Bailey (2021), which showed that peer leaders found meaning in their work and grew personally. It is also consistent with Topping (1996)'s typology of peer tutoring, which described the transferable skills peer tutors developed, and Schwartz and Sendor (1999), who found increased levels of autonomy among peer supporters, as well as increased personal growth, purpose-in-life and self-esteem amongst others.

Deci et al. (2017) suggested that employees' performance and well-being are linked to their level of motivation. Specifically, this arises when there is "a full sense of willingness, volition and choice" (p. 20). As with the participants, their drive to offer peer-led mindfulness enabled their personal development. This relates to Bunting (2012), who showed that, through the peer-mentoring process, personal responsibility and choice helped them to learn and grow (which I posit would also enable competence). What's more, in a study of 166 bank employees, Olafsen et al. (2015) found that autonomy was more important than pay in motivating employees, suggesting that peer-led initiatives could be a useful way to build a productive working environment.

Relatedness, another key aspect of SDT, is the need to feel a sense of belonging and connection to others (Deci & Ryan, 2000). Relatedness is also a key aspect of both Ferrer's participatory approach (Ferrer, 2002) and Fernando-Borsot's LoO (Fernando-Borsot, 2017). Although it may be tautological to describe connection and belonging within a single construct, it was the affective tone of connection that created a sense of belonging for the participants. They experienced being a peer leader as uplifting, enabling them to connect with colleagues and to grow peer-led mindfulness across their respective institutions in a meaningful way. Bailey (2021) described the *feeling of being included* as a key tenet of developing social connectedness. In other words, the feeling of connection served as the intrinsic motivation for participants to undertake their peer-led work.

Relatedness also emerged among participants through peers' embodiment and taking responsibility for their personal mindfulness practice as a way of connecting with peers. The findings show that identifying as a peer leader deepened their personal practice and their connection with colleagues. As Dennis (2003) described, it is through mutual identification, shared experience, and a sense of belonging that relatedness is cultivated which encourages prosocial behaviours in peer-led interventions. For Chris and Jamie, being able to relate to peers on the same level through a shared working environment made peer-led mindfulness so rewarding. To Terry, there was a sense of accountability towards her community, and to Drew, the level of commitment she showed to her peer-led mindfulness initiative reinforced the importance of practising what she preached. This corresponds to Fulton (2025)'s key finding that taking ownership of practice is a way of connecting with peers, as well as Scott and Doughty

(2012), who introduced the idea of interdependence and the responsibility peers take towards others as a key notion of peer support. Fulton noted that it is the practice's role-modelling and the sharing of lived experiences that enable connectivity through peer-led mindfulness spaces, as the participants experienced.

In all, it is suggested that intrinsic motivation was an underlying basis for the participants' personal transformation. Through being empowered in their peer-led work, peer leaders experienced profound levels of meaning and purpose which benefited others, where relatedness in particular appeared to be a strong motivating factor. It demonstrates that through a process of co-creation and participatory knowing, peer-led mindfulness initiatives have epistemic value.

By becoming a mindfulness peer leader and connecting with like-minded individuals, belonging was experienced through an effect upon identity. For Robin and Terry, it was about identifying as mindfulness champions *and* being part of a transformational movement, which enabled a new sense of belonging to emerge. For Jamie, identification as a mindfulness peer leader enhanced her career. Thoits (2021) suggested that identification—both as a *volunteer* and as part of a specific *group* —was a motivating factor for peers in offering services. This is also consistent with Shalaby and Agyapong (2020), who reported on the reframing of identity through their peer support framework.

Jamie and Alex's experience, who identified with being vehicles, suggests an aspect of egoic transcendence (Vaughan, 1985). However, Ferrer's (2002) framework offers an alternative interpretation: Jamie and Alex's peer-led work evoked a desire to

serve and help others. It supports Ferrer's notion that peer-led mindfulness spaces are multi-local, participatory events which have epistemic value through the expression of themselves as agents, cultivating a sense of otherness as per Fernando-Borsot's LoO (Fernando-Borsot, 2017). Identity is also later discussed in the context of inclusion.

In addition, belonging was experienced by the participants through the sense of safety that peer-led mindfulness spaces created. Chris used the specific term "psychological safety" in his peer-led mindfulness work. Although this term is generally associated with learning behaviours and team performance (Edmondson, 1999), it also embodies the creation of environments of trust, respect and care. This emerges from the deep connection participants had with their peers, implying that safety is a function of relatedness, as per SDT. Edmondson described that it is not just interpersonal trust; there is also "evidence of a coherent interpersonal climate" (p. 26), which contributes to the feeling of psychological safety. This is consistent with the literature, which reports the feelings of egalitarianism that peer-led interventions generate (Tamachi et al., 2018) and psychological safety (Mladen et al., 2026). Tamachi et al. (2018) also described the idea of *social congruence,* in which authenticity and intimacy help promote peer-led outcomes.

Whilst participants provided little information about the type of mindfulness they offered, the social congruence described by Tamachi et al. (2018) suggests they experienced a form of relational mindfulness. Arístegui (2021) offered some creative flexibility in interpreting the meaning of relational mindfulness, whose meaning depends on the context in which the practice is situated; it appears that, when practising

mindfulness from a relational perspective, the way attention is directed to others is paramount (McNamee, 2021). The mindfulness offered by the participants was individual by application, yet as Chris and Terry noted, there was a sense of intimacy, which might inform how psychological safety emerges through the effect of groups practising mindfulness together. This also aligns with Good (2016)'s findings, which showed that workplace mindfulness improved interpersonal behaviour and workgroup relationships, though in the context of instructor-led rather than peer-led mindfulness.

Belonging was also experienced through inclusion. Inclusion is defined as feeling part of the fabric of an organisation, both formally through structured arrangements and informally through more casual or social arrangements that facilitate people coming together (Mor Barak, 2015). Participants reported that peer-led mindfulness spaces were where people could deeply connect with one another, either through institution-sponsored programs or through more informal arrangements. In her work as a mindfulness champion, Terry reported that these were places where people shared deeply personal matters, and Robin described the felt sense of connecting with peers on a biological level when bringing people together in more informal contexts. Through feeling included, social connectedness arose, as Bailey (2021) also found in her PAL study. Belonging could also be interpreted to arise through Lave and Wenger's (1991) LLP, where peer-led mindfulness initiatives enabled peers to be comfortable in sharing personal matters, even in a professional work environment.

The inclusive nature of peer-led mindfulness spaces also enabled participants to develop their identities within the organisation as mindfulness peer leaders, as per IT.

The participants' accounts of their experience as peer leaders evoked a sense of nostalgia (i.e., Terry was known as “that mindfulness girl”), which perhaps corresponds to Wenger’s (1998) notion of creating personal histories through participating in a community of practice. Lave and Wenger’s (1991) notion of participation in LLP also corresponds to Ferrer’s participatory approach (Ferrer, 2002), which could point to communities of practice as sites that enable transpersonal phenomena through relating to others. Seen through Fernando-Borsot’s LoO (Fernando-Borsot, 2017), mindfulness peer leaders experienced community through places that empowered sharing with others. Experiences were meaningful, which affected identity; a piercing of the *corporate veil*, a term associated with corporate law but could be transposed to peer-led contexts. In these spaces, new identities are forged through becoming part of a collective of mindfulness practitioners within financial services.

Whilst feelings of connection, inclusion and safety arose through peer-led mindfulness, these feelings were juxtaposed with the tensions peers experienced in their work. The participants acknowledged that for mindfulness to flourish within institutions, it needs to be aligned with the institution’s financial objectives. Mindfulness in the workplace is consistently described as improving attentional and emotional regulation and performance (Badham & King, 2019; Dane, 2010; Good et al., 2016; Shonin & Gordon, 2015). As Badham and King (2019) pointed out, the image of mindfulness at work is individualistic, focused on notions of performance and well-being as well as its therapeutic value. This image creates a normative presumption about corporate mindfulness, reflected in the performance-oriented discourse in the writings of Ng (2018), Rathbone (2013), and Saft (2013).

The fact that contemporary mindfulness practice is value-laden is important. Walsh (2016), in his meta-critique of mindfulness, described that secular mindfulness is not value-free. To the participants, helping others was of primary importance. The legitimacy of the peer leaders work was seen subjectively and is consistent with Leggett (2022), who, whilst acknowledging the criticism of mindfulness as an extension of corporate power and neoliberal ideology (Carvalho & Gracio, 2022; Purser, 2019; Walsh, 2018), described one of the benefits of mindfulness as the enhancement of practices that cultivate openness and respect for others, developed through group processes. In this context, participants saw their role as contributing to peers' well-being, creating psychologically safe spaces, and fostering a culture of belonging through communities of practice.

The dialectical nature of adopting a *both/and* position with respect to the character of contemporary mindfulness suggests that participants made sense of corporate narratives around mindfulness in the workplace and perceived their legitimacy as being negotiated, and that peer leaders viewed their role as agents in the pursuit of noble causes. As previously discussed in the context of identity, both Alex and Jamie described how their peer-led work carried through them as vehicles. The critique of McMindfulness, as an aspect of neoliberal capitalism, is positioned against subjectivity and individual agency as sources of productive power. Power is productive by virtue of its exercise (Kendall & Wickham, 1999) and is present in all social relations (Lynch, 2014).

Subjectivity concerns the way an individual relates to themselves and others (McGushin, 2014). Despite competing corporate narratives, the participants viewed their role as mindfulness peer leaders as having utility in helping others, which aligns with Fernando-Borsot's LoO, which argues that otherness is a fundamental property of being human in the world at large (Fernando-Borsot, 2017). When viewing the LoO through Ferrer's participatory approach, the value of peer-led mindfulness spaces becomes transparent. They are co-creative, involving peer leaders and peers, implying they are fundamentally relational in character. The peer leaders made sense of the legitimacy of their efforts, which was agentic and facilitated their personal development through the effect they had on others, despite prevailing narratives around corporate mindfulness.

Leggett (2022)'s commentary is also consistent with the findings of Colvin and Ashman (2010), who described peers' desire to serve others as a motivating factor. Power was produced through peer-led mindfulness spaces, where participants' subjectivity was characterised by helping others, which had prosocial and transpersonal effects. Autonomy, in the SDT model, was emancipatory, enabling the instrument of power (i.e., the peer-led mindfulness spaces) to arise productively. As it relates to IT, it affected how participants viewed the purpose of their role as mindfulness peer leaders, which is suggested served as a motivating factor.

For some participants, though, this prosocial motivation created tensions with the realities of working in a large financial institution, especially for those who sought to create more inclusive, mindful communities within financial services. Jamie's frustration at their peer-led mindfulness initiative being featured in promotional materials yet not

being funded by the institution, and, in Chris's case, seeing his work as an anathema to the traditions of mindfulness when practised at the boardroom level. It demonstrates the interconnectedness of individual and collective experience, as described in Wilber's AQAL framework, which cannot be easily separated. Jamie's case also tangentially highlights one of Dennis's (2003) perceived risks of peer-led interventions: organisations shifting the burden of mental health support onto peers, though this makes the critique of McMindfulness more nuanced.

Furthermore, where individual subjectivity related to the participants role as enabling performance, other tensions arose. Sam and Terry were very wary of the McMindfulness discourse, yet at the same time admitted that mindfulness programs needed to be positioned around performance, which at times led to inner conflict. This tension between adopting a critical inquiry and performing the role of a peer leader presents an interesting paradox: productive power, in the form of individual agency, coincides with the interests of financial institutions, illustrating the complexity of the lived experience peers had to navigate.

Overall, the findings suggest that how peer leaders experienced and made sense of corporate narratives was diverse: between those who at times questioned the legitimacy of their work and those whose subjectivity was more clearly aligned with helping others as a primary focus. It also suggests something else: the nature of power is diverse. As Feder (2014) noted, "power works through culture and customs, institutions and individuals" (p. 56), a proposition that could be transposed to Wilber's AQAL framework. Tensions arose whenever that power is exercised between

individuals and the collective, particularly between participants' intentions to support their peers and the realities of large financial institutions and their financial objectives.

It could also be synthesised with Ferrer's participatory approach (Ferrer, 2002). Power reshapes the subjectivities of mindfulness peer leaders, and participatory knowing emerges such that peer-led mindfulness spaces have epistemic value independent of organisational narratives. The exercise of power was motivated by participants' self-determination and the role they identified with, which shaped their desire to find meaning and follow their purpose through participatory processes.

The limitations of this study are acknowledged. The small number of participants means the study's findings are not generalisable but may be applied to specific contexts. An interpretivist epistemology determines the meaning ascribed based on individual experience, which may differ across participants. The lenses of SDT and IT were applied in a precursory way as a basis for understanding lived experience, which would warrant further research. Wilber's AQAL theory was used to nominally map the findings to a recognised transpersonal framework, and similarly, both Ferrer's participatory approach and Fernando-Borsot's LoO were also applied from the perspective of how peer-led mindfulness could be interpreted from a transpersonal perspective, without any significant depth in critical inquiry, given the focus was on lived experience rather than an evaluation of these frameworks.

Although I acknowledge my positionality as a researcher, peer leader, and employee of a large financial services organisation—all at the same time, I believe this adds strength to my research and its outcomes. Without experiencing my own

transformation through communities of practice and the challenges I grappled with regarding critical narratives and legitimacy, I would not have been able to construct such research questions across different domains of experience. As Smith et al. (2022) stated, in IPA, the researcher is expected to have some relationship or interest in the subject matter, which inevitably introduces bias. My engagement in reflexive practices, such as journaling, was an attempt to bracket my own experience from peers and to view it through others' lenses.

The implications of this study are important. From an individual perspective, participants' experiences demonstrate the enormous potential for personal and professional development through peer-led initiatives. Organisations could emphasise the value of employee engagement beyond their formal roles and responsibilities through employee resource groups and other grassroots activities. As organisations become increasingly focused on issues related to diversity, inclusion and psychological safety, peer-led mindfulness spaces may also make a valuable contribution. This would involve a reframing of the narratives around mindfulness in the workplace—from those centred on individualistic practices to those that are relational and collective. In doing so, the legitimacy of corporate mindfulness can be enhanced, thereby fostering harmonious relationships within organisations and achieving non-financial objectives. The suggestion is to reposition mindfulness in the workplace as an *other-oriented* practice that aligns with the achievement of organisational non-financial objectives, such as inclusion, psychological safety, and ultimately well-being, which are the goals of social mindfulness (Leonard, n.d.), whose natural orientation is relatedness (Leonard, 2019).

Several areas of future research are possible. What behaviours or factors do peer leaders perceive to be supportive for conducting organisational peer-led activities, drawing specifically upon SDT and/or IT? Building on the synthesis of subjectivity and Ferrer's participatory approach, how do power and participation operate to produce human flourishing? How would a socially constructed epistemology affect the lived experience of peer leaders in other regions whose norms, cultures and beliefs are of Buddhist origin and not as strongly influenced by Western narratives around mindfulness? A grounded theory of the mechanisms underlying peer-led mindfulness would also improve the implementation of in-house peer-led mindfulness within organisations, and a study centred on peer participants' experiences would add greater depth to the phenomenon. And finally, building on Leonard (2019), how might mindfulness be understood as a relational and social practice to support the evolution of the next generation of mindfulness-based initiatives in organisations?

Conclusion

The lived experience of peers leading mindfulness initiatives in financial services was explored through the lens of SDT and IT. It was integrated through Wilber's AQAL framework and interpreted through Ferrer's participatory approach and Fernando-Borsot's LoO. It is suggested that through being intrinsically motivated which also had an effect upon identity, peer leaders experienced personal and professional transformation beyond their formal roles. The second concerns peer-led mindfulness spaces that foster feelings of connection, inclusion, and safety. And finally, how peer leaders balanced the tension between striving to be authentic in their work and aligning with the interests of working in a large financial institution. Wilber's AQAL framework illustrates the complexity of lived experience and the balance between individual experience, communities of practice, and the realities of working in financial services. When viewing Fernando-Borsot's LoO through the lens of Ferrer's participatory approach, otherness is integral to the efficacy of peer-led mindfulness spaces, which are transpersonal events with epistemic value. Although the findings of this study are limited in terms of generalisability, the implications of this research could be broad reaching, from a HR, well-being and inclusion perspective.

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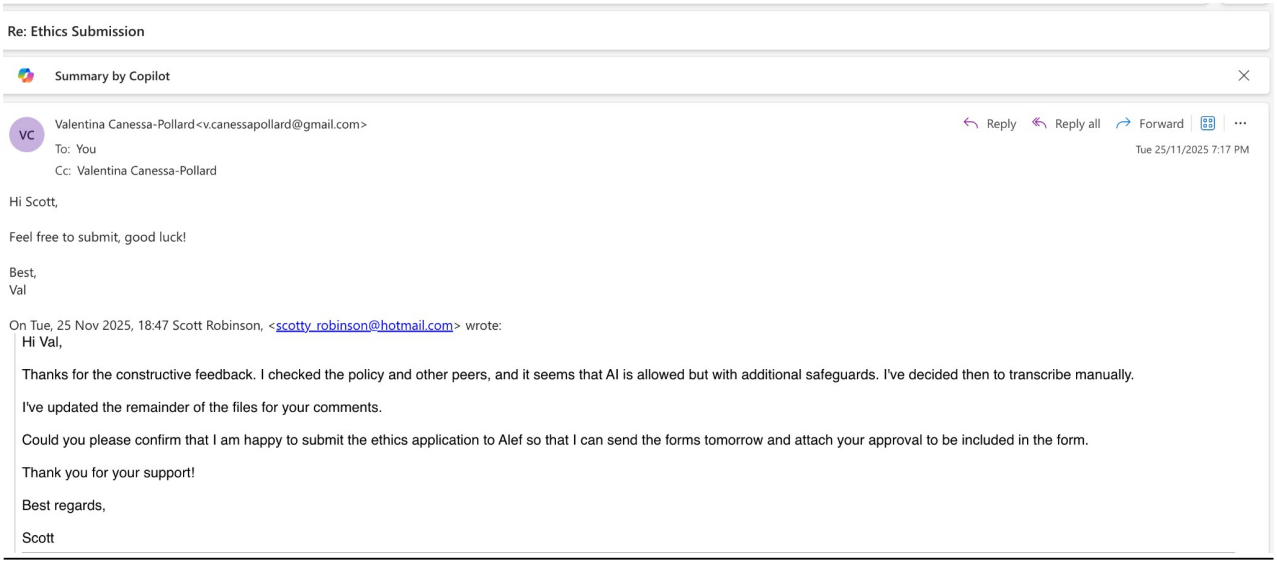
Appendices

Appendix A

Ethics Application Form

Alef Trust Research Ethics Panel Application Form

SCREENSHOT OF SUPERVISOR'S APPROVAL EMAIL



Re: Ethics Submission

Summary by Copilot

VC Valentina Canessa-Pollard<v.canessapollard@gmail.com>

To: You

Cc: Valentina Canessa-Pollard

Reply Reply all Forward

Tue 25/11/2025 7:17 PM

Hi Scott,

Feel free to submit, good luck!

Best,
Val

On Tue, 25 Nov 2025, 18:47 Scott Robinson, <scotty_robinson@hotmail.com> wrote:

Hi Val,

Thanks for the constructive feedback. I checked the policy and other peers, and it seems that AI is allowed but with additional safeguards. I've decided then to transcribe manually.

I've updated the remainder of the files for your comments.

Could you please confirm that I am happy to submit the ethics application to Alef so that I can send the forms tomorrow and attach your approval to be included in the form.

Thank you for your support!

Best regards,

Scott

SECTION 1: Applicant Details

Title of project: The lived experience of peer-led mindfulness initiatives within financial services — a phenomenological inquiry.
Name of applicant: Scott Robinson

1

Programme of study: Alef Trust MSc in Consciousness, Spirituality and Transpersonal Psychology
LJMU email address: ALTSROBI@ljmu.ac.uk
Name of supervisor: Valentina Canessa-Pollard

If ethical approval has already been granted by another agency (e.g. NHS, UREC) please include a copy of the statement of approval.
Is this attached? N/A

Have you viewed (by attendance or by watching the full recording) the Alef Trust webinar "Ethics in Research"
YES

SECTION 2: Basic Study Information

COMPLETE ALL QUESTIONS	Y	N	N/A
1. Will you describe the main procedures to participants in advance, so that they are informed about what to expect?	Y		
2. Will you tell participants that their participation is voluntary?	Y		
3. If the research involves recording participants (audio tape or video), will you ask participants for their consent to record?	Y		
4. Will you tell participants that they may withdraw from the research at any time and for any reason?	Y		
5. Will you give participants the option of omitting questions they do not want to answer?	Y		
6. Will you tell participants that their data will be treated with full confidentiality and that, in any report, it will not be identifiable as theirs?	Y		
7. Will you debrief participants at the end of their participation (i.e. give brief explanation of the study)?	Y		
8. Will your project involve deliberately misleading participants in any way?		N	

9. Is there any realistic risk of any participants experiencing either physical or psychological distress or discomfort?		N	
10. Will the research be conducted face to face (i.e. in person rather than online)?		N	
11. Do participants fall into any of the following categories?.			
a) School Children (under 16 years of age)		N	
b) People with learning or communication difficulties		N	
c) People engaged in illegal activity (e.g. drug-taking)		N	

If you have answered Yes to Question 8, 9, or 11, then this must be considered as a Route B application. Route B applications should include a Risk Assessment.
If you have answered No to those questions, then this can be submitted as a Route A application.
If you have answered Yes to Question 10, then you must submit a Risk Assessment. The application including Risk Assessment can be progressed as Route A.
Please include supervisor's signature under the Route A or Route B option below:

I, the supervisor, have reviewed the information supplied to me by my student on this application and on this basis I consider that this project has no significant ethical implications, and I am happy for the Panel to review it through Route A.	**ROUTE A**
I, the supervisor, have reviewed the information supplied to me by my student on this application and on this basis I consider that this project **may** have ethical implications that should be brought before the Research Ethics Panel, and **deem it necessary to be assessed at the next available Panel meeting.**	

In addition to selecting Route A or Route B, supervisors must also supply the student with an email confirming that they have approved the application as being ready to submit to the Alef Trust Research Ethics Panel. **Students should include a screenshot of the email at the top of the ethics application form.** Submissions made without supervisor approval will not be reviewed.

Section 3: Project Details

Please provide a title and summary of the purpose and academic rationale of your study, including relevant references to previous research. Include the main aim of the project including research question(s) and, in the case of quantitative research, the main hypothesis.

3

My initial research proposal was:
How do peer-led workplace mindfulness initiatives create spaces for belonging and transformation and how do organisational narratives shape their perceived legitimacy and meaning?
After feedback from Tadas, I decided to the revise the research question and methodology to:
Research question:
What does it mean to lead peer-led mindfulness initiatives in financial services? Sub-research questions:
How do peer leaders make sense of their role in leading mindfulness initiatives within financial services?
How do peer leaders experience belonging and community through peer-led mindfulness initiatives in financial services?
How do peer leaders experience and make sense of organisational narratives around corporate mindfulness, and how do these narratives shape the perceived legitimacy of their initiatives?
Literature Review:
Peer-led mindfulness initiatives are becoming more popular in organisations—as staff who are trained or have had experience in mindfulness-based initiatives wish to offer these services to fellow colleagues. I, myself, am a senior professional within a leading global financial organisation and have been leading such initiatives for the last 6 years.
Research has shown that mindfulness can help regulate attention, emotions and improve interpersonal levels of communication within organisations (Good et al., 2016; Lomas et al., 2017). However, critics such as Purser (2019) have argued that corporate mindfulness represents a neoliberal discourse that shifts responsibility for stress from the organisation to the individual. Peer-led models may offer a different approach. One that promotes mutual support and belonging (Mead et al., 2001; Shalaby & Agyapong, 2020). Group processes themselves have been found to also enhance learning and therapeutic outcomes in mindfulness-based programs (Cormack et al., 2017; Allexandre et al., 2016).
There have plenty of studies examining peer-led mindfulness initiatives in the areas of addiction recovery, health & wellbeing, (Ahmad et al., 2023; Danilewitz et al., 2016; Jennings & Jennings, 2013; Fulton, 2025, Kerrigan et al., 2025; Kjeldstad et al., 2025; Moir et al., 2016, Wang et al, 2022; Wang et al., 2025).
Despite their growing presence, peer-led mindfulness initiatives have received limited attention from a qualitative perspective, and none in the specific area of financial services —an area with a reputation as a high performing and pressurised environment, which brings its unique context for researching peer-led mindfulness initiatives. This research intends to address that gap.

Please give a clear and detailed account of the methods of the study. This description should be similar to that of a Method section of a report, with design (including variables), materials/measures, and procedure information (What participants will do, how long each part will take them to complete, and how long overall, etc.) If the study involves published questionnaires or established experimental procedures, please give references.

The research will use phenomenology as the research methodology. Phenomenology is well-

4

to the research as it attempts to discover the essence of what it means for peers to lead mindfulness initiatives within financial services organisations.

Interpretative Phenomenological Analysis (IPA) is chosen as the research method. IPA will explore how peers experience, make sense and interpret what it means to lead peer-led mindfulness initiatives within the specific context of financial services and the related organisational narratives.

The research will involve a series of interviews (of around 1 hour long) with a number of participants (5-6).

The interviews will be performed online through ZOOM and recorded. Transcription will take place manually. It is anticipated that qualitative data management software (such as Quirkos or Nvivo) will be used as a place to manage the data, with a desktop license (and not cloud). Coding and thematic generation will take place through researcher skill and intuition.

Are questionnaires / psychometric tests or interviews / focus groups to be used in your study?
YES
If the questionnaires / psychometric tests have not been previously published, then you must append a copy to this application.
If an interview or focus group is taking place you must append a copy of the interview schedule.

Do you need a criminal records check from the Disclosure and Barring Service (previously CRB)?
No

If yes, provide reference number:

Section 4 : The Participants

Who will be the participants? (e.g. students on the Alef Trust MSc programme, general population, people belonging to a particular group or status, etc)

Employees who are leaders of mindfulness initiatives within financial services organisations

Please state the inclusion and exclusion criteria for participation (e.g. age, gender, health status). Minimum information required here is age (e.g., Inclusion = over 18, Exclusion = under 18).

INCLUSION:

Over 18
Good mental health
Have previously worked or are currently working in financial services and have led mindfulness-based initiatives in person (or online) on a regular basis within the organisation for a minimum of 1 year
Have a personal mindfulness practice

EXCLUSION:

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Under 18
Poor mental health
Not currently working at my own financial institution
A peer who I know professionally or socially

How many participants will be required? **5 - 6**
How will participants be selected, approached and recruited? Where from?
If by letter or email, please provide a copy on a separate sheet.

Participants will be selected using purposive and snowball sampling to include finance professionals who currently facilitate (or have facilitated) mindfulness-based initiatives within financial services organisations.

Recruitment will occur primarily via direct contacts in my peer-leader network and through personal introductions.

Participants will be contacted primarily through email asking if they would like to take part in the research. In case no email address is publicly available, a short message will be sent on the platform where contact is requested (eg on Linkedin or other corporate site), asking if they would be interested in taking part in the research and if so, could they provide their email address to start the research process.

How will consent be obtained? *(tick all that apply)*
Implied consent by completion of questionnaire Consent form *(attach standard Consent Form)*
Parent/carer consent form *(attach Assent Form)*
Please provide further details if necessary, e.g., How will you take consent using remote methods (not applicable to questionnaire studies).

Consent will take place using signed consent forms prior to the commencement of each interview.

Please describe any adverse effects, risks or hazards that may be experienced by the participant as a result of participation. Describe how you will address these issues.

No adverse effects are anticipated. I have explicitly carved out my own peers who at the time work for my institution, there is no conflict of interest or undue influence that may arise.

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Please describe any adverse effects, risks or hazards that may be experienced by the researcher as a result of conducting this study. Please note that lone-working is considered to be a risk. Describe how you will address these issues.

There are no known risks to the researcher. I am working alone but being in regular contact with my supervisor and fellow peers in my co-creative circle helps to minimise this risk.

If you have identified risks to either the participants or the researcher you must append a risk assessment. Is this appended?
YES NO NA

SECTION 5 : Study Location

Where will your research be carried out? (*select all that apply)*
Online
If you have chosen 'Elsewhere', please state specifically where your research will be conducted and why. Make it clear whether you are recruiting personal contacts (friends/family) or people unknown to you.

If your research is taking place in an organisation's facility (e.g. in a school, voluntary organisation or business) then you must provide clear, written 'Gatekeeper' consent from the owner/manager of the establishment. Please attach a copy of the gatekeeper information and consent form for ethical approval here before formally approaching the gatekeeper. Is this attached?
NO

SECTION 6: Declaration

Notwithstanding the declaration below, has the applicant read, understood and accepted the BPS Code of Human Research Ethics?
YES \
I declare that the proposed investigation described in this application will be carried out only as described and that at all times the regulations and guidelines above will be adhered to. Before any deviation from the investigation described or from the Ethical Regulations takes place, the written permission of the Alef Trust Research Ethics Panel will be sought.

Name of Applicant: Scott Robinson Date: 27th November, 2025
Checklists ~ please confirm whether you have completed and enclosed the following:
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Mandatory:
Screenshot of Supervisor Approval Email Confirmed
Participant Information Sheet Confirmed
Debriefing Sheet Confirmed
Additional materials:
Consent form(s) Confirmed
Copies of un-validated questionnaires Not required
Risk Assessment form Confirmed
Gatekeeper Consent Not required
Outline of interview format Confirmed
Recruitment letters/poster Confirmed
Any additional sheets Not required
Where possible, please merge all documents into one file.
All ethics applications must be submitted electronically via ALEFTP 7500 Dissertation site on Canvas. **Please submit your application to the relevant section – whether it is a 'Route A' or 'Route B' application. Your application will not be reviewed unless there is clear, written approval to submit from your supervisor.**

ALEF TRUST AND LIVERPOOL JOHN MOORES UNIVERSITY PARTICIPANT INFORMATION SHEET

Title of Project*:* The lived experience of peer-led mindfulness initiatives within financial services

Researcher: Scott Robinson
Supervisor: Valentina Canessa-Pollard

You are being invited to take part in a research study. Before you decide it is important that you understand why the research is being done and what it involves. Please take time to read the following information. Ask us if there is anything that is not clear or if you would like more information. Take time to decide if you want to take part or not.

What is the purpose of the study?
The purpose of the study is to understand the phenomenon of peers leading mindfulness initiatives within financial services. As a fellow peer myself, I would like to understand how peers experience, make sense and interpret what it means to lead peer-led mindfulness initiatives within the specific context of financial services and the related organisational narratives.

Who can take part?
The participants should be at least 18 years old, of good mental health and are leading (or have led) group- based mindfulness-based initiatives within a financial services organisation, for at least a year and have a personal mindfulness practice.

Do I have to take part?
No. It is up to you to decide whether or not to take part. If you do, you will be given this information sheet and asked to sign a consent form. You are still free to withdraw up to two weeks following the interview and without giving a reason. A decision to withdraw will not affect your rights.
What will happen to me if I take part? The study will take place by way of around an hour long interview, where you will be asked about your experience of leading mindfulness initiatives within your financial services organisation. You may be asked some follow questions relating to the interview.

Are there any risks / benefits involved? There are no anticipated risks of taking part in the research however if at any point in time that you experience discomfort or distress during the interview, you may withdraw from the process. The benefits involve contributing to the initiatives relating to compassion and mindfulness in financial services, which this research intends to make a contribution.

Will my taking part in the study be kept confidential?
Any information (including your email address) you provide will be kept strictly confidential and will be securely stored. Notwithstanding the foregoing, if you disclose to me any information that is illegal or would be in breach of any applicable laws or regulations that would require me to act upon the receipt of such information, I would be required to make an exception to such confidentiality obligation.

Your name, identity of the organisation and location will not be specified in the research. You do not have to provide a name on any questionnaires or information sheets and therefore the information you provide cannot be identified with your name. You are requested to provide the researcher with a signed or initialled consent form, which accompanies this information sheet. This will be kept by the researcher separate from any other information you provide. This will be stored securely and destroyed within 5 years of completion of the study.

Has this study been approved by an ethics committee?
Alef Trust Research Ethics Panel has assessed the research study and approved it.

Who to contact with enquires about this study?
Scott Robinson (altsrobi@ljmu.ac.uk)
Valentina-Canessa Pollard (v.canessa-pollard@aleftrust.org)

Data Protection Notice

Liverpool John Moores University and its partner, the Alef Trust CIC are the sponsors for this study. We will be using information from you in order to undertake this study and will act as the data controller for this study. This means that we are responsible for looking after your information and using it properly. The Alef Trust and Liverpool John Moores University will process your personal data for the purpose of research. Research is a task that we perform in the public interest. The Alef Trust and Liverpool John Moores University will keep identifiable information about you for 5 years after the study has finished.

Your rights to access, change or move your information are limited, as we need to manage your information in specific ways in order for the study to be reliable and accurate. If you withdraw from the study, we will keep the information about you that we have already obtained. To safeguard your rights, we will use the minimum personally-identifiable information possible.

You can find out more about the Alef Trust's data protection policies at: https://www.aleftrust.org/about/privacy-data-protection/.

If you are concerned about how your personal data is being processed, please contact the Alef Trust in the first instance at academicdean@aleftrust.org . If you wish to contact the Information Commissioner's Office (ICO), please note that contact details, and details of data subject rights, are available on the ICO website at: https://ico.org.uk/for-the-public/





ALEF TRUST AND LIVERPOOL JOHN MOORES UNIVERSITY CONSENT FORM

Title of project: The lived experience of peer-led mindfulness initiatives within financial services — a phenomenological inquiry.
Researcher: Scott Robinson

I confirm that I have read and understand the information provided for the above study. I have had the opportunity to consider the information, ask questions and have had these answered satisfactorily ☐

I understand that my participation is voluntary and that I am free to withdraw at any time up to two weeks following the date of the interview, without giving a reason and that this will not affect my legal rights. ☐

I understand that any personal information collected during the study will be anonymized and remain confidential ☐

I agree to take part in the above study by way of interview ☐

I understand that the interview will be video recorded and I am happy to proceed ☐

I understand that parts of our conversation may be used verbatim in future publications or presentations but that such quotes will be anonymised. ☐

Name of Participant Date Signature

Name of Researcher Date Signature

ALEF TRUST AND LIVERPOOL JOHN MOORES UNIVERSITY DEBRIEFING SHEET

Dear []

Thank you for participating in this study.

The aim of the research was to understand the lived experience of peers leading mindfulness initiatives within the financial services. This research is important as it explores the relatively under-researched phenomena of peer-led mindfulness initiatives within the workplace, in particular, in financial services.
If taking part in the research has caused some psychological distress to arise, please seek appropriate care from suitably qualified mental health professionals or your local medical service.
If you later decide to withdraw your data up to 2 weeks following the date of the interview, please contact me using the details below.

If you wish to know the overall findings of the study or would like more information, please feel free to contact either **Scott Robinson** at ALTSROBI@ljmu.ac.uk or **Valentina Canessa- Pollard** (v.canessapollard@aleftrust.org)

Thank you again for your participation

Assessment Number:.....

Ge ALEF TRUST ssessment

Activity: Conducting interviews Location: online (in London) Date of Risk Assessment: 27th November, 2025

Assessment carried out by: Scott Robinson Signed Scott Robinson

Persons consulted during the Risk Assessment Valentina Canessa-Pollard

STEP 1 What are the Hazards?	STEP 2 Who might be harmed and how?	STEP 3 (a) What are you already doing?	STEP 3 (b) What further action is needed?	STEP 4 How will you put the assessment into action?
- an emotional response from potential participants	Identify groups of people. Yourself Your participants	What is already in place to reduce the likelihood of harm, or to make any harm less serious.	As the interview is online, a duty of confidentiality needs to be maintained. If people choose a public space,	By ensuring that participants sign the consent form prior to starting and mentioning that their consent is enduring and may be withdrawn at any time.

Participants becoming upset during participation Online interview		using a Participant Information Sheet and Consent Form Giving participants the right to withdraw at any time Adhering to the ethical guidelines of LJMU and the BPS	remind participants to use headphones and choose a private and safe space to hold the interview.	Action by whom ..... Scott …….. …….. …… ……... …… …… …… …… ……	Action by when …….. On or prior to the time of data collectio n …….. …….. …….. …….. …….. …….. …….. …….. ……	Done? …… …… …… …… …… …….. …….. …….. …….. ……

STEP 5 REVIEW DATE:

Interview Protocol

Introduction and Orientation

Hi [Participant], welcome to today's interview and thank you for agreeing to take part. Just a reminder, we are here today in connection with my MSc research relating to the lived experience of peer-led mindfulness initiatives within financial services. Everything you disclose will be kept entirely confidential and you are free to withdraw from the research during and afterwards at any time up to 2 weeks following the date of today's interview.

Welcome, Introduction and Consent

My name is Scott Robinson, and I am an MSc candidate with the Alef Trust in Consciousness, Spirituality & Transpersonal Psychology. I'm also a director at Deutsche Bank and lead weekly peer mindfulness initiatives across the organisation.

Opening question:

For whom, how, where and when do (did) you lead mindfulness initiatives within your organisation?

Prompt: What drew you to leading such initiatives?

Content questions:

What does it mean to you to lead mindfulness initiatives within your financial services organisation?
Prompt: How does that make you feel to help colleagues in this way?

Prompt: What has it meant for your career in leading such initiatives?

Financial services is a highly demanding, challenging industry to work in. What has it been like to you to lead peer-led mindfulness initiatives within finance in this context?

Prompt: In what ways, if any, does leading mindfulness in this particular environment feel different or distinctive for you?

How do you make sense of colleagues' and managers' reactions to your mindfulness work?

Prompt: How has it made you feel?

What does it mean to you to hold space for peers during such sessions?

Prompt: how does it feel to you to create a community of mindfulness practitioners within your financial services organisation?

Can you tell me about a situation in which you felt a sense of community emerging within your mindfulness group?

Prompt: What behaviours, interactions, or moments made you feel part of a community?

Prompt: How do you experience the group dynamic during sessions?

Can you describe a moment during your peer-led mindfulness work when you felt a sense of belonging?

Prompt: What does belonging mean to you in the context of this initiative?

Prompt: How, if at all, has leading mindfulness sessions influenced how connected you feel to colleagues or the wider organisation?

How is mindfulness presented within your organisation and how do you experience the way your organisation responds to these peer-led mindfulness initiatives?

Prompt: As a peer group leader and the work that you do, how does such narratives make you feel?

Corporate mindfulness has been criticised for lacking authenticity. How do you make sense of such criticism?

Prompt: How do you experience such criticism in your work as a peer-leader leading mindfulness initiatives within your organisation?

Final Question:

Is there anything else you think we should discuss that has not been covered?

Purposive Sampling Draft Email

Subject: Invitation to participate in MSc research relating to peer-led mindfulness initiatives in financial services

Dear [Colleague/Friend],
I am contacting you as an MSc student in Consciousness, Spirituality & Transpersonal Psychology at Alef Trust/Liverpool John Moores University in the UK.

As part of my dissertation for such MSc, I am conducting research into the experience of peer-led mindfulness initiatives within financial services.

If you currently provide such services (or have done so in the past) and would be interested in participating in the research, I would be interested in speaking with you.

The requirements are that you are over 18, have good mental health, have previously worked for or are currently working in financial services and have led mindfulness-based initiatives in person on a regular basis within the organisation for a minimum of 1 year and have a personal mindfulness practice.

You can contact me directly at ALTSROBI@ljmu.ac.uk or reply to this email.

Participation involves an interview for around 1 hour. All information received is confidential and the data received will be held securely. Participation is entirely voluntary and may be withdrawn up to 2 weeks following the initial interview.

The research has been approved by the Alef Trust Ethics Committee. Kind regards,
Scott

Snowballing Sampling Draft Email

Subject: Invitation to participate in MSc research relating to peer-led mindfulness initiatives in financial services

Dear [Colleague/Friend],

I am contacting you, on behalf of Scott Robinson, an MSc student at Alef Trust/Liverpool John Moores University in the UK. As part of his dissertation, Scott is conducting research into the experience of peer-lead mindfulness initiatives within financial services.

If you currently provide such services (or have done so in the past) and would be interested in participating in the research, Scott would be interested in speaking with you. You can contact Scott directly at ALTSROBI@ljmu.ac.uk.

Participation involves an interview for around 1 hour. All information received is confidential and the data received will be held securely. Participation is entirely voluntary and may be withdrawn at any time.
The research has been approved by the Alef Trust Ethics Committee. Kind regards,
[Gatekeeper Participant]

Appendix B

Participant Information Sheet





ALEF TRUST AND LIVERPOOL JOHN MOORES UNIVERSITY
PARTICIPANT INFORMATION SHEET

Title of Project*:* The lived experience of peer-led mindfulness initiatives within financial services

Researcher: Scott Robinson
Supervisor: Valentina Canessa-Pollard

You are being invited to take part in a research study. Before you decide it is important that you understand why the research is being done and what it involves. Please take time to read the following information. Ask us if there is anything that is not clear or if you would like more information. Take time to decide if you want to take part or not.

What is the purpose of the study?
The purpose of the study is to understand the phenomenon of peers leading mindfulness initiatives within financial services. As a fellow peer myself, I would like to understand how peers experience, make sense and interpret what it means to lead peer-led mindfulness initiatives within the specific context of financial services and the related organisational narratives.

Who can take part?
The participants should be at least 18 years old, of good mental health (on a self-reported basis) and are leading (or have led) group-based mindfulness-based initiatives within a financial services organisation, for at least a year and have a personal mindfulness practice.

Do I have to take part?
No. It is up to you to decide whether or not to take part. If you do, you will be given this information sheet and asked to sign a consent form. You are still free to withdraw up to two weeks following the interview and without giving a reason. A decision to withdraw will not affect your rights.

What will happen to me if I take part? The study will take place by way of around an hour long interview, where you will be asked about your experience of leading mindfulness initiatives within your financial services organisation. You may be asked some follow questions relating to the interview.

Are there any risks / benefits involved? There are no anticipated risks of taking part in the research however if at any point in time that you experience discomfort or distress during the interview, you may withdraw from the process. The benefits involve contributing to the initiatives relating to compassion and mindfulness in financial services, which this research intends to make a contribution.

Will my taking part in the study be kept confidential?
Any information (including your email address) you provide will be kept strictly confidential and will be securely stored. If you consent, the interview will be recorded and transcribed using Otter AI, an AI notetaker, which undertakes to comply with UK, EU and US data privacy principles. A copy of Otter AI's privacy policy is publicly available at www.otter.ai/privacy-policy. Notwithstanding the foregoing, if you disclose to me any information that is illegal or would be in breach of any applicable laws or regulations that would require me to act upon the receipt of such information, I would be required to make an exception to such confidentiality obligation.

Your name, identity of the organisation and location will not be specified in the research. You do not have to provide a name on any questionnaires or information sheets and therefore the information you provide cannot be identified with your name. You are requested to provide the researcher with a signed or initialled consent form, which accompanies this information sheet. This will be kept by the researcher separate from any other information you provide. This will be stored securely and destroyed within 5 years of completion of the study.

Has this study been approved by an ethics committee?
Alef Trust Research Ethics Panel has assessed the research study and approved it.

Who to contact with enquiries about this study?
Scott Robinson (s.j.robinson@2023.ljmu.ac.uk)
Valentina-Canessa Pollard (v.canessa-pollard@aleftrust.org)

Data Protection Notice

Liverpool John Moores University and its partner, the Alef Trust CIC are the sponsors for this study. We will be using information from you in order to undertake this study and will act as the data controller for this study. This means that we are responsible for looking after your information and using it properly. The Alef Trust and Liverpool John

Moores University will process your personal data for the purpose of research. Research is a task that we perform in the public interest. The Alef Trust and Liverpool John Moores University will keep identifiable information about you for 5 years after the study has finished.

Your rights to access, change or move your information are limited, as we need to manage your information in specific ways in order for the study to be reliable and accurate. If you withdraw from the study, we will keep the information about you that we have already obtained. To safeguard your rights, we will use the minimum personally-identifiable information possible.

You can find out more about the Alef Trust's data protection policies at: https://www.aleftrust.org/about/privacy-data-protection/.

If you are concerned about how your personal data is being processed, please contact the Alef Trust in the first instance at academicdean@aleftrust.org . If you wish to contact the Information Commissioner's Office (ICO), please note that contact details, and details of data subject rights, are available on the ICO website at: https://ico.org.uk/for-the-public/

Appendix C

Participant Consent Form





ALEF TRUST AND LIVERPOOL JOHN MOORES UNIVERSITY
CONSENT FORM

Title of project: The lived experience of peer-led mindfulness initiatives within financial services — a phenomenological inquiry.

Researcher: Scott Robinson

I confirm that I have read and understand the information provided for the above study. I have had the opportunity to consider the information, ask questions and have had these answered satisfactorily	☐
I understand that my participation is voluntary and that I am free to withdraw at any time up to two weeks following the date of the interview, without giving a reason and that this will not affect my legal rights.	☐
I understand that any personal information collected during the study will be anonymised and remain confidential	☐
I agree to take part in the above study by way of interview.	☐
I understand that the interview will be video recorded and I am happy to proceed.	
I understand that the interview will be automatically transcribed using Otter AI, an AI notetaker and I consent to this.	☐

I understand that parts of our conversation may be used verbatim in future publications or presentations but that such quotes will be anonymised. ☐

Name of Participant Date Signature

Name of Researcher Date Signature

Appendix D

Interview Protocol

Introduction and Orientation

Background information

Welcome, Introduction and Consent

Opening question:

1. For whom, how, where and when do (did) you lead mindfulness initiatives within your organisation?

Content questions:

2. What benefits does practising mindfulness bring to fellow colleagues in financial services?

Prompt: How does that make you feel to help colleagues in this way?

3. Financial services is a highly demanding, challenging industry to work in. What is unique about peer-led mindfulness initiatives within finance in this context?

   Prompt: How is this received?

4. How are such peer-led initiatives received within the organisation?

   Prompt: How does (or did) this make you feel?

5. What does (or did) it mean to you to lead such mindfulness sessions within your organisation?

   Prompt: How has it made you feel?

   Prompt: What does it feel like to come together as a group?

6. What does it mean to hold space for peers during such sessions?

   Prompt: how are issues of boundaries managed?

   Prompt: how does it feel to create a community of mindfulness practitioners within your financial services organisation?

7. Can you tell me what specific feedback you have had when leading the group sessions?

Prompt: How does such feedback make you feel?

8. How has (or did) the facilitation of peer-led mindfulness affected your career, as a leader of mindfulness initiatives within the organisation or financial services industry?

   Prompt: How does this make you feel?

9. Are you recognised within the organisation as a leader of mindfulness initiatives within the organisation or industry?

Prompt: Is this formal or informal recognition?

Prompt: How do you describe your role within the organisation?

Prompt: How does this make you feel?

10. There's a perception that corporate mindfulness initiatives aren't authentic because they are sponsored by organisations to address employee stress, yet the causes and conditions for employee stress is through the organisations themselves. This is known as 'McMindfulness'. Are you familiar with such term, and if so, what's your perspective on it?

    Prompt: How does (or did) such term make you feel in the context of the work that you do (or did)?

Final Question:

11. Is there anything else you think we should discuss that has not been covered?

Appendix E

Sample Coded Transcript

This represents the coded interview of Sam. Screenshots of the transcript was taken as the coding took place in Excel, as described in the Method section.

Transcript	Notes	Experiential Statements/Clusters
Sam: Good morning. Hi Scott,		
Scott 00:54 good morning, Sam. How are you? I'm good.		
Sam 00:57 Thank you. Sorry. I'm slightly late. I just got the the doorbell rang, just as I was about to join, but not at all, I think so sometimes it takes a while, doesn't it, to connect. Absolutely.		
Scott 01:10Thank you so much for your your time and your participation. I really appreciate that. I used to work at [name withheld] myself, so okay, for 2008 to 2012 How long have you been there?		
Sam 01:23 Oh, think it's 21 years, nearly 22 years.		
Scott 01:27 Sort of cross those times of [name withheld] and who else. Yeah, bank at that time. Yeah. So I was group legal with, with legal, okay, right? [name withheld]. Legal, yeah.	Fill Colour	
Sam 01:40 I believe you know my manager, [name withheld], [name withheld], run connection on, on LinkedIn.		
Scott 01:48 I do know [name withheld], actually, yeah, so, so I've met him personally, but we're connected at least.		
Sam 01:56 Yeah, I was just checking who's the I thought it was another person there, but it looks like it's a note taker.		
Scott 02:01 Yeah. So sometimes can be confusing, but a little bit about myself. So obviously, my name is Scott. I'm doing an MSc in consciousness, spirituality and transpersonal psychology, and now my third year dissertation level. And I guess what drew me to the Masters was always mindfulness. It was like, I remember sitting in my father, and my father was saying, you know, what are people really interested in? Sons, mindfulness, you know. And so I decided to do this masters. But there were probably other options in my mindfulness. But I started to do this one because I'm, I know I'm into yoga and consciousness and all these sort of things like, so kind of like, feel like feel like a good fit, right? And so at the same time, too, I've always been leading, well, I initiated mindfulness within Deutsche Bank, not, not, wasn't the first, but really grew it at least.		
Sam 02:53 Oh, is that since you would after you'd been at [name withheld], yeah.		
Scott 02:56 So I joined Deutsche Bank 2000 sorry, I joined, yeah, joined Deutsche Bank 2012 right from took a move from legal into finance,		
03:06 and then I took an interest in mindfulness in about 2019		
Scott 03:13 Well, I've always been interested in mindfulness, but I did mindfulness meditation teacher training with a lady called Cindy Lee. And there was an there was a group already, and I joined the group, and then the teacher left, said, Do you want to take it over? So sure. And then before I knew it, I was known as the, you know, the mindfulness guy for the UK, and I brought in another person, and we've been running weekly sessions for the last two or six years now, seven. So that's part of the bank's wellbeing strategy you've got championing at the board level now. And doesn't sound as developed at [name withheld] as I'd like to hear your experience what you've been doing. But yeah, so for me, always mindfulness. Mindfulness has always been a big part of my journey, my career, my professional career, my day jobs in sort of regulatory policy, more finance stuff. So I started to do my dissertation around mindfulness in the workplace, and then I decided to narrow it down to financial services. And then I was like, Okay, there's a real contrast there mindfulness and finance. How does that work? Yeah. No, you mean Yeah. So interesting your experience. But Sam, in relation to that, are there any questions that you have regarding the study or the discussion today?		
Sam 04:32Not really, I think the form that you asked me to fill in it kind of made it clear. But yeah, I'm happy to help, and yeah, contribute to that dissertation.		

Scott 04:44 Yeah, great. So maybe, maybe just to start, and I guess, just to give you a sort of background, I'm a pretty in most, most of my life. I'm pretty chatty, I guess in when you're mindfulness and relational. Circles. It's all about holding that space, as you might know, and and yet, just to give you some just get to give you some context and some background in this type of research, I'm really holding the space to explore your own experience and what you can tell me which will form the basis of my research. So if I'm not engaged or pausing and prompting and maybe even just holding the space. This is part of the interview process right context. I've kind of learned my lesson in the past where it's like, no, Scott, you can't talk, talk, talk. You actually gotta really listen and really be with your participants. So Oh,		
Sam 05:36 thanks for explaining that. No problem. Yeah. I mean in terms of a question I did wonder, is it possible to see the output or to		
Scott 05:43 Yeah, absolutely. I tend to share the research, and I know a few people have been interested, so I'll definitely share that once it's complete and finished in July, or that when I said we're ready to be released. So Sam, maybe just to start, maybe you could, Libby, tell tell me a little about yourself, your role at [name withheld], how you've been involved in mindfulness at [name withheld], yeah.		
Sam 06:10 So, so, as I mentioned, I've been in the bank for about 2122 years, and I was invited to join mindfulness sessions. I think I'd say it's probably more than 10 years ago, probably 12 years ago. And I have been doing yoga for longer than that, so I was kind of into yoga. Not really heard of mindfulness as such as part of that, but that, that is how my I mean, I still go to the same yoga teacher. That is how often she brings mindfulness, a lot into the session. So somebody had done teacher training invited people in our buildings. They worked in Leeds at the first direct site to come along at lunchtime. So I went, probably for a couple of years, to his sessions, and I found it beneficial. Personally, I'd previously been through a period of work related stress, and I needed to change how I dealt with things, how I managed things, and had sleep issues and that sort of thing. So I found it really helpful, personally. So I went along, and then we had the opportunity to actually become a mindfulness champion and learn how to deliver these sessions. So I jumped at the chance. And so the training was there with the aim to start by promoting it, guiding practices, then do more training and learn how to deliver workshops. So basically, I followed through this path. So there's a whole pathway, and then the final stage was to deliver six week foundation courses. So I went through as a participant, did the foundation course, learnt how to guide workshops and all of that, and then learnt how to deliver the foundation courses. And then probably about a year after I started doing that, a secondment came up in the mindfulness program. So where it's previously was all voluntary with champions, they'd got funding for actual paid employees, and I got involved that way. So I then joined the team and started managing all the training and putting that into place and developing what we teach people. And that's that was in 22 I think 21 I can't remember 2022 I think it'll be four years. And then my role has evolved since then, involved in lots of different things. It's always evolving. So the program's grown. So originally it was just volunteer champions doing guided practices, and then obviously, with the more training we've got, like different levels of champions, I went through all of that, but we, we have six people now in our global team that are absolutely dedicated to mindfulness, and the focus has probably changed a bit. So originally it was probably more the well being side, and now the focus is more, how can we show that mindfulness actually helps people with their performance? So it's not just about helping people who are struggling or mental health issues and that side, but it's more how can people be more effective in their performance at work? So we're now trying to show our value across the organization and having an influence on how we manage people. So yeah.	Had a yoga practice and invited to join mindfulness sessions. Started to find it beneficial and "jumped at the chance" to get further involved. A sense of enthusiasm emerging for mindfulness. The discourse around mindfulness in the work place is about performance, not just mental health. Its having an impact on people.	Discovered mindfulness through yoga and was the spark for deepening her personal interest in mindfulness [Random] Mindfulness practice really helped with her health and inspired her to become a mindfulness champion [personal benefit] Experiences a deep personal commitment to mindfulness practice through vocational immersions [personal benefit] Integrating her passion for mindulness into a professional role within [name withheld] [passion] Experiencing a psychological shift when mindfulness is viewed not just from a well-being perspective but workplace performance [Benefit to the bank]
Scott 09:42 Wow. How interesting, Sam. And what drew you to becoming a mindfulness champion and then becoming involved? Is it? What? Full time? Now, your role?		
Sam 09:50 It's full time. Yes. So yeah, just on the program, the mindfulness program, full time. But yeah, what drew me originally was. And how it could help me. And I wanted to then learn how to help others. And also I could see that there was a lot of skills to be learned. And I Well, I'm not going to go into my whole background, but my career had gone from being when I was young, sort of climbing the ladder and pursuing a career in HR, and then things changed very, completely other way, where I decided to leave, and I kind of started from scratch again, really, I did something completely different, and my career just was not going anywhere, and I languished for a lot of years, and I was in the bank, not really being challenged, quite bored, having nice hours, nice benefits, and thinking I'm grateful for where I am. But I wasn't going anywhere. So I could see if I got involved in volunteering as a champion, I it would be good for my career to learn, to kind of get back into developing and building those skills. And I can use mindfulness to help me do that, and it actually gave me a lot of confidence where I probably didn't have much so yeah,	Became drawn to mindfulness as a way to help herself but also wanted to learn to help others. Career was going nowhere and so being a mindfulness champion helped her develop her career and gave her a lot of confidence.	Being drawn to mindfulness as way of helping herself and others [Helping others] Experiencing career stagnation prior to mindfulness opportunity emerging [Professional Benefit] Feeling torn between being grateful for her job but wanting more growth professionally [Professional Benefit] Faciliating professional growth through mindfulness [Professional Benefit] Personal growth and confidence through being a mindfulness champion [Personal Benefit]
Scott 11:14 so it sounds like the doing becoming a mindfulness champion and then actually promoting this within your organization has been beneficial for your career? Would that? Would that be fair?		

Sam 11:27 Absolutely, yeah, I didn't have any, probably any confidence in myself. Didn't really see myself going anywhere career wise, and wasn't getting opportunities and with mindfulness, I just thought, you know what I can actually do, things that I didn't think I could do. Yeah. And the stress of delivering in front of people and things like that, so much easier when you can manage your emotions and your your nerves and take a breath and all you know, the skills that you learn meant that I could do stuff that I hadn't really thought I could do. My manager was really supportive. It's like, just push yourself the whole way. Go as far as you want with it. I wasn't being challenged in my role, so he was happy for me to do this as a sideline. And yeah, I built my confidence, and I never would have imagined doing what I do now, you know, talking to complete strangers over a zoom, you know, you'd be hundreds of people there, so I can see the benefits for me. But also I, you know, lots of other people can benefit from this too. So I wanted to to give back and and do that. And obviously, ultimately that get meant that I could then join this program.	Renewed sense of self-belief. A sense of renewal in her career. Gave her a lot of confidence to do things she otherwise wouldn't have had been able to do such as the stress of delivering in front of people. A real sense of accomplishment and acknowledgement that this can benefit others as well.	Career renewal through mindfulness championing [personal benefit] Developing vocational skills that otherwise wouldn't have been possible through mindfulness [personal benefit] Could not believe what she has achieved as a result of being a mindfulness champion [personal benefit] Knowing that her mindfulness work benefits herself but also others [Helping others] Wants to give back to the community by joining the program [giving back]
Scott 12:44 Absolutely, absolutely. I mean, maybe we could explore that. What does it really mean to you to really lead these initiatives within the organization to help others? I mean, what's the real sense that you make of offering these services as a peer to other peers,		
Sam 13: 03 seeing people get the value out of it, the feedback that I get, it's so satisfying, and also being in a role now that is groundbreaking. We're doing things that have never been done before, and people can are starting to see, wow, you know, if we were all mindful, just what would the world would be like? Things are very different when you think and act mindfully. So when I see that happening in the bank, moving in the right direction, you know, that's That's amazing.	The novelty of the work. The 'groundbreaking' nature. The sense that this is having an impact, in terms of the bank acting 'mindfully' and 'moving in the right direction'. Feels good to her and aligned with her work.	Loving the groundbreaking nature of being a mindfulness champion [being a pioneer] Feeling deeply connected to her work, the bank and the greater world [personal benefit]

Scott 13:41Absolutely, I can certainly relate to that, that that sense of that what it means to cultivate a mindful culture, absolutely, and just in the context of financial services, where this has been situated, it's a highly demanding, challenging area to work in. You know, I worked at [name withheld] and now at Deutsche what, in terms of this specific context of financial services, what's what does that mean to you to lead these initiatives? Is it that felt sense that I'm in a kind of very unique environment? I'm leading mindfulness initiatives?		
Sam 14:18 Yeah, and I think that there are those specific challenges that other businesses or organizations might not have, and you know, it's very like you say, demanding, and people work a lot of hours always on. So I think it's great when we can sort of demonstrate that actually you might get more done by doing less. And you know the ability to just take a step back and pause, take breaks and look after yourself, means that you can actually be more productive, and that's what the bank really needs, rather than just more more more. And I think in covid particularly. Everyone got sent to work from home, and there was no longer the boundaries to go home. And what we can do is help people to see a better way of being and working that will make you know our financial services actually better. And then there's an influence on the customers as well, and we can have a much bigger reach than we might have thought possible a few years ago. Yeah, and just how people actually interact with each other. Because I think I don't know about other organizations, but there was certainly a feeling of one probably still is in lots of pockets competition. And, you know, competing for the best performance ratings, that actually we don't have to compete against each other. We work together, then everybody can shine. And obviously not everyone's going to be top performers, but we can. You can demonstrate your worth, not by trampling over other people, but actually collaborating and helping people. So it's much more pleasant if we work in that way, rather than the old style kind of you know me first?	Finance is highly demanding and its the contrast of taking a pause that helps people to become more productive. A real sense of speed in her langauge 'go go go'. Changing the culture from competition to collaboration through mindfulness. A sense of 'we' emerging, rather than 'I'.	Mindfulness offers a natural anchorpoint to the fast-paced nature of financial services [contrast to banking] Making a meaningful contribution towards the bank meeting its organisational goals through mindfulness training [benefit to bank] Helping to transform and creating a better more collaborative culture through mindfulness [benefit to bank]
Scott 16:22Yes, so absolutely, the me first culture is very prevalent, as we know, in an organization, any organization, and so does it really feel different and distinctive that we're really bringing mindfulness within financial services, which might be a culture which is very competitive, yeah.		
Sam 16:45 And I think, you know the horror stories you might hear about people hear about in the press about banking and how, you know, some of the behaviors have led to these huge fines that we've had, and you know those sort of behaviors, it's where you would hide your mistakes, and you would you think that to get ahead, that the best way is to be kind of secretive or whatever, and we don't need to do that. And it feels better to work together	The backdrop of the challenges and fines the banking industry has been through and through mindfulness it is making a difference. It 'feels' better to work together.	Feeling of making a better, more inclusive and sustainable financial sector [broader impact]
Scott 17:18 exactly, exactly it feels better is that that felt sense that you experience as a peer, that it just feels better, and you get that sense from other colleagues who participate to,		
Sam 17:31 yeah, the idea of supporting people and noticing how that feels. I mean, I think it's, it's just, when people learn mindfulness, they just get a different perspective on things. But yeah, it's, I mean, I'm not really, truly in financial side of things. I'm a little bit more removed, especially in the role that I'm doing, but I have been there. When I first started in the bank with very much forefront front customer facing, you know, finance type work, and I think the potential for what we do is enormous, and we're only, you know, a little way to where we could be. But yeah, where I used to work originally, was in a call center talking to customers every day. And I see potential for mindfulness to help people on the phones to you know, when we are we are supporting them, but I think we could, you know, support them even more, and support customers as well. And other you know, of customers we have, like corporates or whatever, we can have a much bigger reach,	The sense of supporting people and the impact it has upon others "noticing how it feels". A big potential for mindfulness to have a big impact through supporting not just bank staff but also customers too.	Noticing how helping others through mindfulness affects how she feels [personal benefit] Recognising the potential power of mindfulness to help staff and potentially customers [broader impact]

Scott 18:44 yeah, and maybe we could explore that a little bit further. So one of the great things about mindfulness is we bring within, and then it sort of expands outwards. Are you seeing any sort of feedback from clients or customers in any, any way, or is it too early to say at this point?		
Sam 19:06 Yeah, not sure that I'm close enough to be able to say, say that, but that's, you know, we're the direction we're heading to go a bit more external and have an external reach, yeah, but I mean internally, you know, where our purpose that we have as a mindfulness program is to help people to be at the best, to create those conditions, and that's what we're, we're trying to do. And who doesn't want to be at the best?	The goal of mindfulness is to help people "be at their best". The sense that mindfulness has a higher purpose.	Feeling the direction of travel in mindfulness is about making a much bigger impact [broader impact] Mindfulness training is about helping people to reach their full potential [Helping others]
Scott 19:34 It's, yeah, I mean, it's, it's, you know, it seems obvious, you know that we want to one of the things we always talk about is well being, is the power behind performance and so absolutely and in terms of, I mean, how do you make sense of your colleagues and your managers reactions to your work? Is there any How do you in terms of what. You're doing, the feedback, the sense that you're getting, how do you sort of, how does it make you feel in the context of what your managers and colleagues are reacting to your work?		
Sam 20:13 Oh, it's amazing. I mean, the reaction is very positive. And I think sometimes there's pushback on having the time. People think they don't have time. So, you know, that's something that we try to educate people on, is actually, you can do this at any time. You don't need time. You can, you can be mindful all day long. You don't need to stop what you're doing. But, yeah, no, the feedback is really good, and it's, it comes from, you know, all different departments, different levels, different types of roles. It's pretty much all positive. There may be some cynics that people that don't want to participate, but I think when we show the value of it and the the benefits to them, they get it. So that's, you know, we're working towards educating.	"Amazing feeling". A real sense of meaning. Mindfulness is about educating others how they can improve their lives.	Loving the impact she is making through faciliating mindfulness across the whole bank. [Helping others] Feeling determined to show the benefits of mindfulness practice even in the face of resistance [Being a pioneer]
Scott 21:04 How does that make you feel as the where your your your people are starting to see the benefits? How does that make you feel as		
Sam 21:13 excited, you know, for the future and where we can take it? And it's really positive to be able to have that to get that feedback. It's it makes me feel like it's all worthwhile,	Excited about mindfulness and its potential. It's all worthwhile. Meaningful.	Excited about the potential of mindfulness to change the world and makes her job meaningful.[Broader impact]
Scott 21:25 yeah, worthwhile in the sense of the work that you're doing and from a personal perspective. But also, maybe you talked about earlier that it's really helping on a bigger		
Sam 21:40 Yeah, yeah. You know the what people that have participated, it's like a community and have a common language and how we interact. So it feels like you're you're part of something and it and for me, I feel like I'm part of something that is the future, particularly when there's lots of fears around AI and the future. What does future hold?	meaningfulness is connected to the sense of community emerging and the interactions. "feels like you are part of something" that is the future. Feeling safe?	Feeling being part of a group and deeply understanding each other in spite of all the uncertainty and anxiety about the future. [Connection]

Scott 22:04 Yeah, yeah. And maybe Absolutely, I mean that this is, this is the thing with AI, and how do we be mindful? It's a really interesting thing to work with, and maybe we could explore that idea of community. What does it mean to you to, really, to hold these spaces for your peers?		
Sam 22:28 It's wonderful. And, you know, I deliver courses probably a couple of times a year. Deliver six week courses. And going through those, it's always just, it's a lovely, warm feeling to kind of don't get to know people deeply, but to get to know these people from different walks of life, from different, you know, countries, because it's global to have that impact on people, and then you get the feedback, and they're like, Wow, I didn't, didn't realize that, you know, or I was struggling, and now not, or people were saying, you know that they're going to go and tell their department managers, they're going to start delivering stuff themselves, they're going to share it. It's made such an impact on them. It's like, wow, this is like a ripple effect.	The impact of mindfulness work helping others and then that cascades through the bank. The 'ripple effect'. Use of 'wow. A sense that this is quite profound.	Feeling warmth through deep connection with others [Connection] Very rewarding to see others spread the word about mindfulness through [name withheld] and go on to become trainers themselves [Personal benefit]
Scott 23:13 Yeah, absolutely. And I mean, in terms of the community, feel, maybe you could talk a little bit about that. I mean, you have, you have communities. Have a		
Sam 23:23 champion community. So all those ones, we've trained probably 250 people, and then we've got a wider community of people that are interested, or, you know, they've been through the foundation training, or they've joined sessions themselves. They've consumed what we offer in some way, we've got that sort of bigger community.	Many layers of community	Community emerging through mindfulness championing [Connection]
Scott 23:44 Wow, wow. And how does it make you feel to create that sense of community?		
Sam 23:52 Like I said, it's a wonderful feeling, like you feel like part of something that's, you know, connected,	Community builds connection. It feels wonderful. It's meaningful.	Buiding community fosters connection which is very meaningful [Connection]
Scott 24:01 connected Exactly, exactly. Were there any specific moments where you felt that sense of connection emerging,		
Sam 24:11any particular anything,		
Scott 24:13 anything, any behaviors, any moments and interactions, part of your training, you mentioned the sixth week where you really felt that sense of, oh, we're really expanding this sense of practice where, actually it's a sense of we that we're creating. Were there anything, anything moments where it clicked in your mind, or just consistently, you're seeing hap sort of this occurring within the institution, this community of practice?		
Sam 24:39 Yeah, and I think it's when people proactively start doing something on the back of it, you know, so they might have been on a course, or they're in the middle of a course, and then if they post something out there, and they share their own stories, and that's what we encourage them to do. So, you know, there are people that will, that will do that, that will post something, and you think, wow, yeah, they. If something's clicked or changed for them, and it's because of mindfulness. So yeah, anything else? Yeah, I mean people who do my courses, then the ones who then decide to become a champion. You know, it's had a big impact on them. They want to give back. And it's a lot of effort. It's a lot of time, as most people are really busy. I mean, I was lucky, because my my background was I wasn't busy enough, not challenged enough. I had loads of time to to offer, to do this sort of thing voluntary, but most people don't, but they still want to do it. They still choose to put that time aside alongside a busy day job to deliver sessions. So that's you know, that just shows how much they value it. Yeah, they're prepared to do that.	Community is created when others start to share and it propogates into the wider world. Again, the use of the word 'wow' suggests it is really meaningful and powerful. The sense that people are really sacrificing something or to make it fit in their work because its really valuable. The feeling of knowing something is 'good' and wanting to give back. The commitment that arises from doing this.	Community building becoming very meaningful when others share what she has started or taught [Community] Community becomes meaningful when others volunteer and make time for it on top of their busy day jobs [Community]
Scott 26:00 Yeah, I can really see that ripple effect that you describe. It seems very powerful. And how do you personally experience the group effect in terms of people coming together? What does that really mean to you?		
Sam 26:14 Yeah, I think that practicing alone has its+A54 benefits, but when you practice together, there's something else there, and it's similar to when you go to a yoga class or, you know, being because virtually, what most things I do is virtual. It's not in person anymore, but you still get that sense of connection, even through zoom to feel part of a group. So, yeah, I think there's something special around that when people practice together,	The feeling of connection when people come together. There's "something else"	Something special emerges when people come together to practise. [Community]
Scott 26:49 absolutely, absolutely and when, when you get when, when people practice together is, were there any moments where you felt a sense of belonging emerge,		
Sam 27:02 yeah, yeah, definitely. And particularly when you get the same people. I mean, people will come back time and time again, and it's nice to know that you know, you recognize that person, that name, you've seen them before. It builds those connections there.	Belonging emerges through people coming back and being recognised as part of the group	Belonging emerges when people return on a regular basis and builds connections [Community]
Scott 27:20 So yeah, and are there any specific moments you can describe that you you can recall, where you can describe that sense of belonging emerging?		
Sam 27:34 It's hard to think of a specific moment I've been doing this for so long,		
Scott 27:42 or maybe, to summarize, generally, the experiences you've had where this belonging emerged, moments during the meditation or during this leading sessions, or Um,		
Sam 28:01 it's really hard to pinpoint that. I mean, you know, when you've got this group, I mean, when I if I guide in a practice, I get the benefit, whether I'm well, whether I'm guiding or actually on the receiving end, or doing my own there's always a benefit to me. But I do feel that when there's a group there practicing together. There is just this it's hard to say what it is, but there's this community feel. And then when people are sharing afterwards, you know that it's helping each other. So if they're sharing what they noticed, what's what they struggle with, how it's helping them, then other people hear that from each other, and then it they kind of feel validated, or they feel that they whatever they're experiencing is is okay, and it's not just, I'm saying that as a guide, but they, when they hear it from each other. That's what makes a difference, that you know, so same with the training courses to try and get people to share their own experiences, because then others hear that and they know that they're not alone. Yeah.	The feel of community is ineffable Its value is indicated when others share the practices as well. Feeling of work is validated when hearing it from other peers. Peers helping each other is where the power lies.	Benefiting from mindfulness practice herself when delivering sessions [Personal benefit] Having difficulty describing the feeling of community that emerges when people come together [Community] The power of community arises when others share their experiences outside of the group [Community] Hearing other peers talk about their experiences helps to support other colleagues and validates what she is doing [Community]
Scott 29:19 Makes sense. Makes sense. And how, if at all, has leading mindfulness sessions influence how connected you feel to other colleagues, absolutely.		

Sam 29:30 Because, particularly when I started working from home in covid, and I've never gone back, because I'm not that close to the office as the travel time would have been, you know, a bit of a headache, so I took the opportunity to stay working from home, but I don't see people, you know, I'm at home. So to have that community, obviously, I've got that with my team, very small team, but I feel like I'm part of something much bigger, this whole program, you know, the champion community. Community, the wider community, it feels it means a lot to me. And then when I'm naturally coming across people through whatever channels, it's like, Oh, I know this person. I know people throughout whatever roles that you know. I've probably got a wider reach than most people, because they've got their own big departments. They might have two or 300 people in their department that they know, but they wouldn't know someone in the side of the world, or they might not know people in a different type of role, whereas I'll know people all over and yet I'm sat here in this room, not going anywhere. So it's opened up a whole world to me. So yeah,	Community supports her well-being when she is working from home. Network within the bank has increased, compared to others in a more convential role. "It's opened up a world world toe me". A sense of amazement and wonder.	The feeling of her wellbeing being supported through the mindfulness communnity and being a part of something much bigger [Community] The significant network benefits of being a mindfulness champion that has opened up many possibilities which would not be possible otherwise in an ordinary role [Personal benefits]
Scott 30:41 I relate to that. I definitely relate to that. That's really, really great to hear. Thank you for sharing that maybe we could talk about, how is mindfulness presented within your organization, within [name withheld], and how do you experience the way the organization responds to these		
Sam 31:02 initiatives, it's presented as a way for us to be our best. So like I say, we're moving towards trying to demonstrate the performance benefits that you know well being impacts performance, and if we don't look after it, performance will suffer. So that's kind of how it's presented, that you know, if you practice these different elements, you know, awareness, compassion, kindness, friendliness, or the kind of values, and if you you know, aware of yourself and what you need and do what you need, then your performance will improve. That's kind of the benefit to the organization. But obviously individuals benefit too. And how we talk to each other, how we communicate, we're sort of presenting it, you know, we're trying to role model how you communicate. So when we're sending stuff out with think about how do we actually say it, and what do people actually read? Because most of the time, people don't really read their emails. They skim read, they miss stuff, they don't they don't spot things, and they miss information. People send out far too much. It doesn't get read. It's just a waste of time. So what we're trying to teach people is to be mindful about what they actually put out there. So we try to sort of put it in the right way that will grab people's attention, say what they need, and nothing more, and say it in the right way that will appeal to the human side. So we're just trying to be more human about what we do and not have long procedures or complicated ways of working. And now we're trying to teach people about that, how to simplify and be more mindful, basically, about how we work.	Mindfulness is presented holistically in the organisation. About workplace potential. How to be better at work. A sense of purpose and focus for the project.	Presenting mindfulness as about reaching one's potential and its connection to performance [Benefit to the bank] Practising universal values such as compassion helps the individual perform better and hence the organisation [benefit to the bank] Being the change agent by role-modelling good mindfulness behaviours and teaching people to be more human and live a simple life [being a pioneer]
Scott 32:57 Interesting, interesting and as a peer. I mean, how does such narratives about mindfulness make you personally feel?		

Sam 33:11 It makes me feel like I'm in the right job, and it's, it's, it's nice to be able to do that and to to be able to have that encouragement of backing to take your time with stuff in order to do it better and not keep doing things you don't need to do. So I find that really helpful. I find that makes me feel like, you know, I'm doing something worthwhile and I'm not doing stuff for the sake of it. You know, ticking a box or keep doing work that's not valuable. It's learn all the time. And that's what I live for, you know, to be able to learn. And I think the way we I think the team role model how to be with each other. That's what we that's well, I'm grateful. That's how I feel. I'm grateful. Because if we if we give each other feedback, it helps you to learn. It's not to make you feel bad. And most people don't want people to feel bad, but sometimes how they give but sometimes how they give feedback might make them feel bad, whereas it's it's all done with the right motives and Yeah, makes you feel good.	The sense of purpose in her job. Its meaningful. Peer-led mindfulness helps her to grow and develop. "that's what I live for, you know". Mindfulness supports others, helping them to feel good, especially re feedback.	The feeling of having landed in the right job gives her a sense of purpose in her work [Personal benefit] Feeling supported in her work which supports her overall purpose [Personal benefit] Loving how being a mindfulness champion feeds her desire to learn [Personal benefit] Role-modelling mindfulness virtues and giving feedback helps to faciliate personal and professional growth and warmth [Personal benefit]
Scott 34:35 Wonderful, wonderful. And moving slightly different angle on the conversation corporate mindfulness. You might be familiar with some of the criticism of of it, I'm not sure near the term make mindfulness, by Ron Purser. How do you make sense of that criticism in light of the work that you do? Yeah.		
Sam 35:00 Yeah, and it's something we've always been wary of. And I think the main thing is that this idea of mindfulness is where you just give some kind of solution and lead people to it, and think that's it, job done. And what that's completely opposite to what we've always tried to do, which is, you know, to follow on from what we're offering and give them more give support and continued experiences. So it's not just here's an app, go away and use it, and that's it. We've looked after your well being. You know, there might be an app, or there could be whatever it is we're offering, but they can stay part of that community. And then I suppose the other bit of mindfulness is this idea that you can be present but you don't have the right attitude. So it's we always have an element in what we do around compassion and the way people are with each other. It's not just you know about being able to, you know, notice your breath. It's not just about that or sitting to practice, but it's about actually engaging with people, being mindful about how you listen, how you speak. So it's an attitude that's that's there and that would be missing with the mcmindfulness. It would be very much just about being on your own. And you know, here's some tools for you. Whereas we're not about just benefiting individuals, we're about benefiting teams and departments and, you know, the whole wider piece.	Conscious of the McMindfulness critique. Trying to make a difference on a more organisational level. Use of the word 'wary' suggests it is something that is conscious and present.	Is mindful of McMindfulness criticism and takes measures to address it [Realistic Attitude about Mindfulness] Feeling that real mindfulness is about supporting others and making a difference [Helping others] Being a mindfulness champion is about making an impact on a much wider scale [Having an impact]
Scott 36:33 And do you experience this criticism in any way in your own work? Do people?		

Sam 36:38 No, not really. It's something we've always been wary of, and it might be externally, but no, we don't. We've never really had that, probably because we're always really conscious that it's not just about here's some things for you individually, and don't complain about stress. You know, it's, I think I've not really experienced any criticism, but I suppose people, some people who don't engage with it, might think, well, you know, you can do all that, but it's still really stressful. So you know what you're going to do about that, whereas we're trying to change culture, you know, top and bottom, you know, bottom up and top down. We're trying to change it so that people realize what stress people are under and try to help them, not just here's some tools for you.	real sense of trying to make a difference to change the culture, "top and bottom" and "bottum up and top down". More than just tools.	Very mindful of the McMindfulness criticism [Realistic Attitude about Mindfulness] On a mission to change the culture through the mindfulness program [Being a pioneer] Helping people to wake up to the amount of stress they are under and not about superficial solutions [Realistic Attitude about Mindfulness]
Scott 37:36 And so when people express skepticism or say, Well, I I'm really stressed, and mindfulness, mindfulness is there, but it's not helping. How does or it's I don't believe in this stuff. How do you How does that make you feel?		
Sam 37:51 I haven't had a lot of that kind of pushback, to be fair, it's mainly I don't have time. I see the benefit, but I'm struggling because I've got people wanting my attention all the time, and it's you can't shut yourself off, you know? So, yeah, it's if I get that kind of people saying that it's other being cynical. I just try to help them to see that you give it a try. Don't expect, you know, what is it you're expecting? What do you want it to actually achieve? If you're thinking it's going to be some kind of magic cure, then it isn't. And that we, you know, something that you practice, and it's about bringing that attitude and fluency rather than expecting this. You know, it to do something, and it doesn't work, but it doesn't mean you can't change things. So if you're if you're in a position where you're being put upon and it's too much, too much stress and they don't care. You can't necessarily just stay in that position and think, Well, I do my mindfulness, and that'll help me. Perhaps you might need to make a decision about where you know, are you in the right place.	a sense of realism about mindfulness — what it can and can't do. Being able to influence others, beyond just mindfulness (ie what work are they doing, how much stress they are under).	Understanding that mindfulness has its limits [realistic attitude about mindfulness] Helping people to wake up to their levels of stress so they can do something about [Being a pioneer] Influencing others through mindfulness how others lead their lives [Being a pioneer]
Scott:And that's an interesting		
Sam: What can you do to influence other people.		
Scott 39:16 That's an interesting point. So where the tension lies between mindfulness and levels of stress.		

Scott 40:32 So in terms of it's it sounds like there's a is there a sense of realism about mindfulness within the bank?		
Sam 40:45 Yes, absolutely. And we do always say, you know, this is not magic cure. It might not be for everyone. It might make you feel worse, you know, we, we, we give people kind of a bit of a safeguarding messages around that that you know, if it doesn't, if you makes you feel worse, you can stop at any time, maybe try again another day, your experience will change day to day, and you know that it's not going to achieve something. It's not what it's about. It's not about turning up to achieve something. It's just about being here and noticing how things are without trying to change anything. So we always give that kind of message, yeah.	"this is not a magic cure". [name withheld] views mindfulness as about becoming more	Recognising the limits of the benefits of mindfulness and communicates that clearly [Realistic Attitude about Mindfulness]
Scott 41:34 Fantastic, fantastic. Sam. Is there anything else you'd like to share with me regarding your own experience and how you make sense of your experience of being a peer lead.		
Sam 41:55 No, no, really, I just think I just feel grateful to be in this kind of role, and that I I can see a future in it, even though not necessarily everybody would. Some people would think that what we're doing is some kind of luxury that we shouldn't have because it doesn't make money. But I know that there is a future in it, and that it's groundbreaking what we're doing, and it will continue to be, we just have to keep you know one step ahead	A feeling of gratitude to be in the role. A feeling of being part of the future. A slight sense of insecurity about its perception "because it doesn't make money"	Feeling grateful to have the mindfulness role and being part of the future [personal benefit] Loving being a pioneer in this space [Being a pioneer]
Scott 42:28 Absolutely, does this sit within HR, or people function, or where does this sit?		
Sam 42:32 It doesn't actually know it's it's separate. There is, like a well being team, which is probably, probably sits under HR, but we're not actually in that area. So we're just under a different umbrella, just just because, for historical reasons, whoever supported and sponsored us. So, yeah, we've obviously got links, links with wellbeing and HR,		
Scott 42:59 of course, of course. And can I ask, in terms of the six week program, is that modeled off MBSR? Is that [name withheld] zone proprietary?		
Sam 43:08 It's our own. It's our own. I think originally it would have been based on similar it's always been tweaked and changed and different. And basically it's, it's tailored to the workplace, because MBSR is not really tailored to the workplace. So yes, it's probably say it's more our own, and it's definitely tailored to the working environment, and the focus is on the skills.		
Scott 43:35 Yeah, yeah. Now I know there's the mindful leader, workplace facilitator program. I'm thinking about doing that at some point, really interesting conversation. Thank you so much for sharing Katie. It really. You know, it sounds like from your own experience, and I guess, put it to you to summarize or to to conclude or state that this experience for your own career has been something, yeah,		
Sam 44:09 yeah, there's always so much to learn and or have learned so much, and mindfulness actually just helps me to to do my job well,	There's a strong learning component to being a mindfulness peer. Helps her to grow in the role and hers	Mindfulness helps her to grow in her role and satisfies her strong desire to learn [personal benefit]
Scott 44:22 and it sounds like beyond your individual job, but the meaning that you ascribe to being a peer leader, and what it's for your career, from what I gather, this has been, has has been profound,		
Sam 44:37 yeah, and we all Need a bit of meaning, and without it, you know, you know something's missing, and that's what was missing. Before I started mindfulness, I found some meaning, even if my job wasn't giving me a lot of meaning. Participating as a mindfulness champion was was given me that meaning, yeah, to have an impact on people, yeah.	Absence of meaning in job before mindfulness. Meaning is so important — "we all need a bit of meaning". Current role lacked meaning. It was about impact	Being a mindfulness champion has given her meaning in her work [Personal benefit] Meaning is about making an impact and helping others [Helping others]
Scott 45:00 How, yeah, and how has it shaped your identity within the organization? Do you think		
Sam 45:06 my identity? What do you mean? What? How other seeming you mean?		
Scott 45:12 How you make sense of your role as being a as being you're the [name withheld] program manager.		
Sam 45:20 I'm not the so my manager, Sean, is the head of mindfulness, and I'm a Business Operations Manager, so more look after the operations of what we do and do it better.		
Scott 45:35 And so for your own career, you said before you were just going through, I guess, like a lot of careers, reached a plateau. It's, it sounds like, and I guess, in your own words, it's meant something to you from a career perspective, to have this role. Yeah, yeah.		
Sam 45:57 It really has, yeah. But without it. If I speak for a lot of the other champions, they you know, they've got their careers that they have something else that is giving them even more purpose and meaning, and there's a lot of value to be said for doing that, and it will help them in their day to day roles. You know, both because they practice, but also because they share it, and are a champion for it. It gives them a lot of purpose and value.	The mindfulnepeer work gave a lot of meaning to their current role. The sense that mindfulness enhances other work and when they share it, it brings purpose and meaning.	Mindfulness championing enhances their own work through being a champion and gives sense of purpose [Personal benefit] Being a mindfulness champion means people practice which benefits them and also by sharing others [Personal benefit]
Scott 46:33 And if I understand correctly, was there a period of time when you were a champion? I think I recall,		
Sam 46:39 yes, before I joined the program, was a champion for quite a few years.		
Scott 46:43 Yeah, so you had a dual hat like myself, yeah. And that when you, I guess, I guess now you're dedicating your role full time to this. How did you experience your role when you were a champion, in terms of the overall effect upon your own career within the bank, the energy, the motivation, did it affect your day to day job? Or what did it bring		

Sam 39:26 People think that, you know, either it's going to help them to get rid of the stress, or it's not going to work, because the stress will still be there, you know. So it's about what's within your control, what's within your influence than anything else, where you if you can't do anything about that, mindfulness isn't going to be some kind of cure, but you can have an influence on others, and you can make your own choices about how you respond. It's not a magic pill. So yeah. So sometimes, some areas I don't, you know, I. Not familiar with them, but I know there'll be areas of the bank that perhaps don't allow time for people to practice, or they don't support it, or it's just full on constant pressure with no relief, but ultimately they're not going to be at their best. So we need to try and help the managers to realize that the ones that actually have the control or the power, what can they do to help? Because it isn't just go and practice.	Mindfulness isnt' an antitode to stress. "its not a magic pill". A real sense of knowing where the value of mindfulness practice lies and where it doesn't.	Understanding the limits of what mindfulness can do and its not a magic pill. [Realistic Attitude about Mindfulness] Perceives there are other parts of the bank that are very stressful and are missing out on the benefits of mindfulness [Being a pioneer] Understands the importance of being able to practice mindfulness but also realises its limits [Realistic Attitude about Mindfulness]
Scott 40:32 So in terms of it's it sounds like there's a is there a sense of realism about mindfulness within the bank?		
Sam 40:45 Yes, absolutely. And we do always say, you know, this is not magic cure. It might not be for everyone. It might make you feel worse, you know, we, we, we give people kind of a bit of a safeguarding messages around that that you know, if it doesn't, if you makes you feel worse, you can stop at any time, maybe try again another day, your experience will change day to day, and you know that it's not going to achieve something. It's not what it's about. It's not about turning up to achieve something. It's just about being here and noticing how things are without trying to change anything. So we always give that kind of message, yeah.	"this is not a magic cure". [name withheld] views mindfulness as about becoming more	Recognising the limits of the benefits of mindfulness and communicates that clearly [Realistic Attitude about Mindfulness]
Scott 41:34 Fantastic, fantastic. Sam. Is there anything else you'd like to share with me regarding your own experience and how you make sense of your experience of being a peer lead.		
Sam 47:11 to you when you brought me a lot? Because my actual job wasn't bringing me very much, I felt like I could do it standing on my head. So yeah, I was not challenged. But when I started doing this, because my confidence increased, I knew that I could develop my capabilities through a different avenue, not my actual job. It did have an impact on my job and how I was rated and how I was seen, and people saw things in me that they wouldn't have seen before. So I was given more opportunities. It still wasn't much, but yeah, it had, it had an impact. I started joining a what they called an engagement Council, where it was a global team. And, you know, I was asked to sit on this council and look at, how can we engage people? And what I was doing in mindfulness helped me in that and widened my reach and connections and all of that, and that helped me to be a better champion as well. So it worked both ways.	Confidence levels increased after taking the mindfulness champion role. Career and skills development all occurred through mindfulness, including broadening her network	Being a mindfulness champion helped her developed the confidence to take on additional roles [Personal benefit] Broadening her professional network through being a mindfulness champion [Professional Benefit]
Scott 48:16 So how did that make you feel to be a better champion and have a broader reach through the organization.		
Sam 48:23 Yeah, it gave me more to do, to aspire to to, to be able to, you know, do something more in depth, rather than just guiding practices, which is where I started to actually delivering workshops and courses, and to illustrate feedback, it's like, wow, I wish I could do this as a full time job, and then I got a full time job and not just doing that work. Obviously, there's a lot more to what I do now, but to have permission to do that kind of stuff as well, it's good.	Sense of enery that the mindfulness role gave her. "Something to aspire to". Meeting her personal passion with her full time job.	Feeling inspired after becoming a mindfulness champion [Personal Benefit]
Scott 49:01 And what did it take for the organization to switch from, like, just a peer led to a proper role within the organization for mindfulness? Do you think what		
Sam 49:11 it took to get that to happen? You mean, I wasn't involved in that side of things. To be fair, we had somebody who was previously on the program who helped kind of really get that and that they were very senior, so they had contacts at a very senior level. So I guess it was talking to the right people at the right time about those benefits and about the cost savings we could make, because we were also using an external resource a lot, and we could train people in house to do those things. So over the time, the costs would reduce, which they have, the cost of reduced massively. So although we've got paid a paid team, if we didn't, basically wouldn't have achieved anything like what we've got. We would have had, we would just have some people doing. Guided practices, and we would have to keep paying people to train them, and whereas now we're delivering a lot more value. But yes, it was amazing to get that. And like I say, it's not under HR, you know, it came through somebody who happened to be passionate, who was happy to allocate some budget. Then that's that's that's quite fortunate, but yeah, I wasn't involved in those discussions, and how it, how it got agreed, but it's, it was a great decision.	Immense value to organisation having inhouse program. A sense of passion - "it was just amazing to get that. ". "It was a great decision". A sense of doing the right thing for everyone, including the bank. A quality of knowing	Feeling proud that the bank sponsors mindfulness [Personal Benefit]
Scott 50:29 No, I've always been curious about, I mean, I've known about the program at [name withheld] for a while, and you know how that would translate into a business case, even though we have a champion at the board level who talks openly about mindfulness, yet to in a cost constrained environment, it's hard to measure, you know, return on investment versus absolutely,		

Sam 50:53 yeah, it really is it. I mean, it still is. We haven't figured that out how to how to quantify it. You know the value of what we do other other than to say what we've delivered would cost x externally, that's but if we didn't deliver it, what would the cost be? Then it's, yeah, we haven't figured that out, but what we're trying to do is just prove our worth, and the demand that we have, the demand has grown exponentially. So you know what people want us to do that? That's kind of part of the evidence.	Unsure how to prove value of mindfulness from a corporate perspective. But demand is there and	Knows the value of mindfulness practice to the organisation through the demand for their work [Benefit to the Bank]
Scott 51:29 And is it volunteer? Is it is it people participate in as opposed to people being asked to participate in? Is it volunteer in terms of people can opt into the trade?		
Sam 51:39 Yeah, no one's forced into it, although we do sometimes deliver stuff for a department and they'll be invited as part of their wider off site day, or something like that. Bigger meetings will have, might have an element of mindfulness, but then once they're forced into it, and they might be encouraged when it's that kind of thing, we tend to try to sort of limit the mindfulness language, and it might be a little bit more tailored to appeal to people who don't do mindfulness,	Participation in mindfulness programs is voluntary. Tries to tailor sessions for people	Wanting to make mindfulness inclusive for all [Impacting others]
Scott 52:11 of course, of course. And what do you think has been the success of the what's been the reasons behind the success of the program?		
Sam 52:20 Why the success? Wow. Of all the passionate people that have been involved that must be part of it, and the fact that we had support at a senior level, without that just not going to get anywhere. You have to have senior people that are bought in, and that's what we that's what we had, and what we're trying to get more of. And we certainly, you know, the ones that know about us absolutely support us, but we need to be more known about. So it's a journey.	Passion breeds success. A real sense of enthusiasm for the project. Its personal. It's meaningful. Pioneering work perhaps — "it's a	Passion builds success [Professional benefit] Being a mindfulness champion is a real journey [Being a Pioneer]
Scott 52:54 Wow, and okay, I mean, I think we're coming up to time and everything I wanted to cover. I guess maybe for me, I get I'm really interested in this idea of community and sense of what it means just to really lead these sessions individually and for others, maybe just some final remarks on that,		
what is, what it feels to lead		
Scott 53:21 them, yeah, just in terms of how it's really brought a different quality to your to your career,		
Sam 53:33 to lead. For me, when I'm leading, it's similar to doing my own practice, that I it's a two way thing. It doesn't just, it's not just sending it out. It also is good for me to be able to do that in my working day. Helps, like, you know, if I was doing a practice or, well, anything really, if I join something and I'm delivering, it's a refresh for me, too. And when I'm practicing, I notice how I am. And also, if I prepare myself beforehand, using mindfulness, rather than just, oh my God, I've got to do this thing, and I'm stressed. It's more okay. What do I need? I'm excited about this. This is why I might have a bit of sweat on, you know, it's, it's noticing all the things that are going on in my body, and the reason for it, I understand that, and that helps me. And it also means I can be authentic and share, you know, so it's a benefit to me to do all these things, and then, you know, you finish with a smile on your face.	Leading mindfulness practice helps her — it's good for me to be able to do that in my working day". A feeling of being "refreshed". "You finish with a smile on your face." Helps build somatic awareness, which creates authenticity and vulnerability. Increases ability to share.	Being a mindfulness champion supports her own well-being [Personal Benefit] Allowing herself to blossom or be vulnerable [Personal benefit]
Scott 54:51 Yeah, yeah. And is it a benefit, the sense of we, do you think, or is it more than just that? Just. For you, it's that real.		
Sam 55:02 Yeah, people go away with the smile on the face as well. Yeah, the benefit is we. It's, you know, the impact that you have, and also the, you know, the return that I get from the people. Yeah, there is that sense of community, and I authenticity and that, you know, there's something different about doing, you know, workshop on mindfulness, as opposed to some kind of dry technical training or something else. There's obviously some, some more. It's more of a communal community spirit and Yeah, makes me feel good.	The feeling of seeing the visible impact upon others and what she gets in return. Doing something different through mindfulness, rather than just ordinary work (compared to 'dry technical training'). This is heart led and meaningful. Brings that sense of community and how	Seeing the impact upon others is very rewarding [Personal Benefit] Mindfulness championing is novel and more human compared to ordinary banking [being a pioneer] Championing invokes community spirit [Community]
Scott 55:49 Absolutely, absolutely okay, unless there any other Did you have any questions for me? I know you meant us at the beginning. I would certainly I may come back to you during the between now and July, just to see to check in. This is what I've some of the themes that are coming up, whether you agree or have any comment upon that, and I'll certainly share with dissertation once it's once it's completed and marked. Was there any other questions that you had for me?		
Sam 56:13 Yeah, which other organizations have you gone to?		
Scott 56:17You're the first I've spoken to so far. But I'm speaking with Morgan Stanley. JP, Morgan. I'm speaking with prior people at Royal Bank of Scotland, people at BlackRock. And then who else have I got potentially? Yeah, there's a couple of Morgan Stanley quite active in this space. So quite a nice spread across the city, both London, New York. Yeah.		

Sam 56:50 I mean, I have to admit, I don't know too much of what other organizations are doing. So yeah, if there's anything that's shareable or whatever would be interesting to hear, yeah, absolutely.		
Scott 57:00 I mean, I can, I can share that. It's, it's, I mean, for me, I've invested a lot of time into this, from a personal perspective and professional perspective, I went to New York last year for a compassionate finance Summit, and I met a lot of these peers. And so there's, there seems to be a lot of people who have been doing this. It's nice to nice to see [name withheld] has formalized this and how I can contribute in the research, because I think it's such an important thing. As you said, the beginning, a more mindful culture just helps. Whether you believe, whether you believe in mindfulness or not. It's a mindful way of life. Is a is a more my view, it's a more respectful of yourself and others, and I think that's the culture we want to create.		
Sam 57:45 Yeah, exactly, yeah. Align with the business way of speaking. And you know what, what the businesses, you know, their values and what they want the whole business to actually do, is very aligned with mindfulness, and that's where we're now sort of working to show that, to say we can help you to align to the business values and business goals and all of those things. So yeah,		
Scott 58:15 and one other point is, there anyone else within your champions who might be interested in participating to get their perspective.		
Sam 58:23 Possibly, yeah, I don't know that would be probably quite helpful to get it from their perspective. Someone who's got it doing it as a side of		
desk actor, could you introduce me to		
Sam 58:38 I mean, I don't know anyone in particular who would, who would suggest that? Because there could be so many that. So what would would you want me to share something I could order?		
Scott 58:51 Yeah, I could send you an email afterwards. And if you could maybe just share something about the research, what I'm doing, and whether instead talking to me about being a mindfulness champion.		
Sam 59:04 [name withheld], yeah. I mean, I need to check with Sean as well that I'm okay to do that. Another thought that's crossed my mind is, if I've got connections on LinkedIn, you connected with me on LinkedIn, yeah, and then I'll probably have connections that are champions and that shout about it on their profiles, you know, and you could always say that you've spoken to me as a mutual content so maybe on LinkedIn. Now, that might be better. I'm not sure about using our work channels to No, I wouldn't.		
Scott 59:41 I would need, I would need ethical approval to do that, yeah,		
Sam 59:44 to sort of advertise this request, and it's not really a work request, sure, yeah, I'm not, not sure I'll be comfortable with that. But yeah, if I add you on LinkedIn, and then if you have a look to see who I'm connected to, I'm sure there's lots of champions on there. So anyone who's. Visibly saying about what they're doing, yeah, perhaps that		
Scott 1:00:04 might be a way. Sure, I'll have a look at that. Thank you, Sam, yeah, great. Well, thank you so much for your time. I really appreciate and I will come back to you during this study. And I really appreciate your time. And if anything has come up in the meantime, by all means, please reach out. Okay, yeah, well, good luck with it all. Thank you, Sam, thank you so much again. Thank you, bye, bye, thank you bye.		

Appendix F

Extract of PETs per Participant

This represents an extract of an example of how I organised my personal experiential themes per participant corresponding to each sub-research question, noting similarities with other participants, which I then organised into another file (in Appendix G).

Participant	Sub-Research Question	Personal Experiential Theme	Sub-Themes	Similarities
Sam	How do peer leaders make sense of their role in leading mindfulness initiatives within financial services?	The feeling of being a pioneer in one's career	Being a mindfulness champion is ground-breaking Determination despite meeting resistance Being the agent of change	Terry, Patricia, Alex, Drew, Jamie, Chris, Robin
		Peer-led mindfulness is about the feeling of making a much wider impact	Meaning in job is connected to making a much wider impact through mindfulness Mindfulness extends to helping customers Mindfulness helps foster inclusivity Mindfulness helps to create a better financial sector	Terry, Patricia, Alex, Drew, Robin
		Finding meaning & purpose in being a MC	Rewarding feeling seeing others benefit from mindfulness Extending the personal benefits of mindfulness practice to helping others Satisfaction in helping others to reach their full potential Rewarding feeling seeing others benefit from mindfulness Deep sense of fulfilment in career Deepening commitment to practice mindfulness Impact upon health as a basis for inspiration	Terry, Alex, Drew, Patricia
		Achieving personal & professional career growth through becoming a peer-leader	Career revival after becoming a peer-leader Grew professionally as a result of being a peer-leader The networking benefits of peer-led	Drew, Alex, Robin, Jamie, Terry, Chris

Appendix G

Extract of Supporting Personal Experiential Themes per Group Experiential Theme

This represents an extract of how I collated personal experiential themes across all the participants, which I then inductively interpreted to find a number of sub-themes which helped generate each relevant Group Experiential Theme.

Group Experiential Theme	Group Experiential Sub-Themes	Illustrative List of Supporting Personal Experiential Themes
Finding meaning, determination & growth beyond formal roles	1. Finding meaning & purpose 2. Wanting to make a significant impact 3. Achieving personal and professional growth	The feeling of being a pioneer in one's career Peer-led mindfulness is about the feeling of making a much wider impact Finding meaning & purpose in being a MC Achieving personal & professional career growth through becoming a peer-leader Being a Mindfulness Champion is about making an impact Being a mindfulness champion has been meaningful to one's career Helping others gives meaning to being a peer-mindfulness facilitator Wanting to make the biggest impact in financial services through being an MC The meaningfulness of being a peer-lead to one's career Being the agent of change in financial services through wellness Wanting to make a difference and help others Mindfulness deepens connections to themselves and others Being motivated by a desire to help fellow colleagues Having a desire to make a significant impact and reach others Having nostalgia for his time in running [name withheld] Facilitating a deeper exploration of his own mindfulness practice Mindfulness improved her own work skills Loving the groundbreaking nature of being a mindfulness champion Doing peer-led mindfulness was about making a massive impact Helping others gives meaning to being a peer-led mindfulness practitioner Mindfulness improved her own work skills Confidence increasing because of skills learnt being a MC Reflecting on how important being a mindfulness lead has been for her career Having the importance of being a peer-leader and to role model these practices Embodying mindfulness and seeing it ripple through Being part of the finance community and being able to relate to others Acknowledging the benefits of having a mindfulness practice for her career longevity

Appendix H

Extract of Cross-Case Analysis

This table represents an extract of the summary of the cross-case analysis I performed where for each Group Experiential Theme (which related to each sub-research question), I noted convergences and divergences amongst participants with supporting experiential statements, quotations and line numbers.

Group Experiential Theme	Sub-Research Question	Sub-Themes	Similarities/Differences	Pt.	Experiential Statement	Quote	Line No.
Finding meaning, determination & growth beyond formal roles	1	• Wanting to have a massive impact • Finding meaning & purpose • Achieving personal and professional growth	Finding meaning & purpose in work has been a general theme across the participants. The only one who didn't express this was Chris although one could say he knew what he was doing was unique, by reference to how much he rebelled against mainstream corporate culture and viewed the limits of mindfulness practice in corporates. Meaning and purpose extends to helping others and making a difference. Making an impact is also related to meaning & purpose, although whether impact relates to helping others or bringing forth one's capabilities through him or herself (as the conduit) is a subtle difference Personal and professional growth also	Sam	Loving the groundbreaking nature of being a mindfulness champion	Seeing people get the value out of it, the feedback that I get, it's so satisfying, and also being in a role now that is groundbreaking. We're doing things that have never been done before, and people [can] are starting to see, wow, you know, if we were all mindful, just what would the world would be like?	131–133
				Alex	Doing peer-led mindfulness was about making a massive impact	You were impacting others in a very, very significant way, and people were proud to be associated with me, if they carried me into their world to say, here's a gift. You know, this person's going to be with you for an hour, but you'll come away changed, and people wanted to be associated with the fact that you know, that they believed in the change that could be made through this person me as being the vehicle, you know.	199–203
				Sam	Helping others gives meaning to being a peer-led	yeah, and we all need a bit of meaning. Without it, you know there's something missing. And that's what was	412–414

Appendix I

Extract of Journal

This represents an extract of my journal I took throughout the research, which shows in particular how I reflected upon my conversation with Alex.

Dissertation Journal

It was good to do this interview. My second one and I was a lot more mindful and present. A couple of leading questions but they came during the discussion and was almost inadvertent and a consequence of the discussion after Sam had raised points. I was probing more and this was good.

22nd January, 2026

Wow! A totally different immersive experience. So much passion. It really brought to light the differences of experience that people have with leading mindfulness initiatives within organisations. The challenges that they experience and the personal passions they have to want to do good. It felt like they know its good, so I want to bring it to the wider group, even in the face of resistance. It's good to speak to such individuals as they bring such diverse and open opinion.

I'm started to feel more excited about the research now, as it is opening me up to new ways of thinking about peer-led mindfulness, how it is experienced and introduced across banks. Perhaps also, the assumptions had relating to the research has changed and has widened the appeture for me about this whole phenomenon.

26th January, 2026

The conversation with Alex was so interesting. Very different to my approach. He's into hacks and techniques and working on the sub-conscious. It made me realise my work is more niche, more heart centred and relational. I don't know how I feel then. There's a side of me who can't do that, because that's what is being done out there and what people want, and you have to give them what they want. Give them the salmon as they say in $100 Start Up. So the performance side of mindfulness is definitely something that is there inside other institutions and very different to approach, yet he had such profound impact upon others. But the feedback I get from others is also positive, in my own way. It's a wake up call, to some extent.

His work is different to others. I'ts not about the relational field necessary. He didn't run groups, so it will be an anomaly in that respect.