HANDBOOKS FOR DAOIST PRACTICE

修道手冊

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INTRODUCTION

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書序

ORIENTATIONS

During recent years, I have had the opportunity to meet and speak with various Daoist teachers, dedicated practitioners, and interested students about the Daoist tradition. In a variety of contexts, public talks, course lectures, conferences, seminars, and practice sessions, many have expressed a sincere interest in deepening their understanding and practice of Daoism. This series of translations, these "handbooks for Daoist practice," are for them and those who follow.

Handbooks for Daoist Practice (*Xiudao shouce* 修道手冊) consists of ten "handbooks." These include handbooks two through ten (the nine booklets that are the Daoist translation series proper). These are translations of nine important, representative, and praxis-orientated Daoist texts. The first (or tenth) handbook is an introduction to the series as a whole.

In this introductory handbook, I discuss Daoism as a Chinese religious tradition and Daoists as those for whom "cultivating the Dao" (*xiudao* 修道) is their fundamental concern; important publications in the field of Daoist Studies, which may serve as resources for self-education; some philosophical issues in the study of "Daoism"; significant aspects of the history and development of the Daoist tradition; principles for Daoist practice; the importance of "scripture study"; the motivations behind my choice of texts deserving translation; and my translation methodology.

Daoism (Taoism) is a Chinese religious tradition in the process of being transmitted and adapted to a global context. On the most basic level, "Daoism" refers to an indigenous Chinese religious tradition(s) in which reverence for and veneration of the Dao (Tao) 道, translatable as both the Way and a way, is a matter of ultimate concern. In contrast to adherents of other Chinese religious and cultural traditions, Daoists (Taoists) understand the Dao as Source of all that is, unnamable mystery, all-pervading numinosity, and the cosmological process which is the universe. The Dao is impersonal and simultaneously immanent and transcendent. Broadly understood, the point of a Daoist way of life is to cultivate alignment and attunement with the Dao.

Daoism is a Chinese religious tradition. Daoism is Chinese because it originates in Chinese culture and, in some sense, because it is most clearly understood through Chinese language and views of being. Daoism is a "religion" because it involves an orientation towards and relationship with the sacred. Daoism is a "tradition" because it is a community of dedicated practitioners connected to each other as a historical and energetic continuum.

At the same time, Daoism is now being transmitted and adapted to a global context. Daoism is no longer merely a Chinese religious tradition. It is now a global religious and cultural phenomenon(a), existing in Australia, Brazil, Canada, Denmark, England, France, Italy, Korea, Singapore, Thailand, and Vietnam, and practiced by people of a wide variety of ethnic backgrounds. It is also slowly becoming established in the United States in various forms, with varying degrees of connection with the earlier Chinese religious

tradition. Without an understanding of such historical precedents, Daoism in the West will simply be a fabrication, a fiction, and a fantasy. This does not mean that there should not be adaptation and modification; change necessarily occurs when a religious tradition enters a new cultural context and when religious practitioners have different concerns and motivations. But it does mean that without a connection and collective memory such "innovations" become meaningless names.

The Daoist tradition is a community of practitioners connected to each other as a historical and energetic continuum. **Daoists** are those for whom cultivating the Dao (*xiudao* 修道) is their most important orientation.

The identity of Daoists derives from their *being and presence.* One is a Daoist based on the extent to which one is aligned with and embodies the Dao in its multi-layered numinosity. One is a Daoist based on the extent to which one embodies Daoist principles and follows a Daoist *way of life.*

Daoist identity does not come from some supposed "orthodoxy" associated with Zhang Daoling 張道陵, the receipt of registers (*lu* 籙), "religious licenses," and/or some magico-ritual performance. This is the province of *certain* Daoist priests (*daoshi* 道士), which must be recognized as one way among many revealed by the historical contours of the Daoist tradition. The models of Daoist practice-realization, established, modified, and confirmed through some 2,000 years of history, are many and varied.

Daoists recognize the Dao as Source, all-pervading mystery, and immanent numinosity. The immanent numinosity of the Dao pervades one's being; it is one's innate nature and innate capacities. Throughout Daoist history, the Dao has become manifest through the revelations of specific deities and immortals, through their interaction with and self-disclosure to human beings. From the perspective of classical Daoist "theology" (discourse on the sacred), based on emanation and immanence, such divine beings are *embodiments* of the Dao.

Fortunately, for the interested student of Daoism developments in Daoist Studies over the last ten years have been dramatic. There are now a variety of resources for the study of Daoism. We now have books that are written *by* specialists but not only *for* specialists.[1] These include both introductory articles on the Daoist tradition (Seidel 1978; Baldrian 1987; Kirkland 1997; 2000; 2002; Schipper 2000) and book-length introductions by trustworthy and competent members of the field of Daoist Studies (Robinet 1997; Kohn 2001a; Miller 2003; Kirkland 2004; Torchinov forthcoming). Students will also want to consult two important reference works, namely, the *Daoism Handbook* (Kohn 2000a) and *The Encyclopedia of Taoism* (Pregadio forthcoming). Helpful "timelines" of Daoist history may be found in Julian Pas' *Historical Dictionary of Taoism* (1998) and in

[1] Specialists frequently decry the "impoverishment" or "bastardization" of Daoism in the West, but few evidence a commitment to seriously considering the actuality of trans-Chinese forms of Daoism or to directly rectifying the various misconceptions in circulation outside of elite discourse communities. Let me be clear, beyond the most publicly visible forms of New Age appropriation, popular misunderstanding, and spiritualist commodification, there are, in fact, Daoist religious adherents and communities throughout the world.

Livia Kohn's *Daoism and Chinese Culture* (2001a). For those interested in the various ways in which "Daoism" has been understood, interpreted, and constructed, J.J. Clarke's *The Tao of the West* (2000) deserves careful reflection.[2]

Interested readers may also want to access other resources for self-education. Some very helpful **bibliographies** have been compiled. The seminal publication in this area is Anna Seidel's "Chronicle of Taoist Studies in the West" (1989-90). Also well done and fairly available are Julian Pas' *A Select Bibliography of Taoism* (1997 [1988]), much of which also appears in his *Historical Dictionary of Taoism* (1998), and Knut Walf's *Westliche Taoismus-Bibliographie/Western Bibliography of Taoism* (2002 [1997]). These guides may be supplemented by the bibliographies for the various articles contained in the *Daoism Handbook.*

Because of the relatively recent ascendancy of the internet or World Wide Web (WWW) as the most easily accessible source of information, some websites deserve mention. But first a caveat: discernment is a human faculty too rarely employed, especially with regard to the internet. There are differences among information, knowledge, and wisdom. Here I am speaking pragmatically. Information is simply unrefined "stuff"; believing that "information" for its own sake is beneficial or makes any contribution is similar to believing that unlimited consumption, the acquisition of manufactured "goods," makes life worth living. Information is

[2] For critical responses to Clarke's research see the special edition of the *Religious Studies Review* 28.4 (2002).

frequently disseminated by those who have not dedicated themselves to the study and skills required to represent things accurately, that is, beyond the limitations and deficiencies of one's own personality, unquestioned assumptions, and habitual perception. Knowledge, in contrast, has been filtered and refined more thoroughly. Knowledge evidences fundamental qualities: consideration, reflection, discernment, and evaluation. The attainment of knowledge involves being an engaged being. It also requires an openness that benefits from those who have dedicated themselves to study and the search for accuracy. One might, in turn, suggest that it is "knowledge in the service of life" that is most needed.[3] Moreover, as the *Laozi* 老子 (Lao-tzu; Book of Venerable Masters) explains, "To know that you do not know is best;/To not know that you are knowing is sickness./To be sick of sickness is the end of sickness" (ch. 71).[4] Knowledge is not something to be used as a way of inflating one's ego or dominating others. One must always recognize how little one actually knows and that knowing *itself* is often a limitation. Thus, chapter two of the *Zhuangzi* 莊子 (Chuang-tzu; Book of Master Zhuang) informs us, "One who dreams of drinking alcohol may weep when morning comes; one who dreams of weeping may in the morning go off to hunt. While you are dreaming you don't know it's a dream, and in this dream you may even attempt to interpret the dream. Only after you wake up do you know it was a dream. Someday there

[3] By "knowledge in the service of life" I mean knowledge that is committed to sacred realities, ecological concerns, social ethics, and human flourishing. Keeping in touch with foundational Daoist concerns, it is knowledge which "nourishes life" (*yangsheng* 養生).

[4] In this context, it is interesting that the character *chi* 痴, meaning "ignorance," consists of *chuang* 疒("disease") and *zhi* 知 ("knowing"). Ignor-ance, by extension, is a form of sickness of knowing.

will be a great awakening (*dajue* 大覺) when we know that all this is a great dream (*dameng* 大夢). And yet, the ignore-ant believe they are awake, deceptively assuming they understand things. They call this man lord, that one commoner—how dense! Qiu (Confucius) and you are both dreaming! And when I say you are dreaming, I am dreaming too." [5] According to classical Daoism, abiding in a condition of "non-knowing" (*wuzhi* 無知) creates the space through which a connection (*tong* 通) with the Dao may be established, maintained, and communicated. Finally, wisdom is more than knowledge. On one level, wisdom is knowledge that is engaged with and refined by the actuality of *living* and *experiencing.* It has been clarified by one's own life experiences. More than this, wisdom involves insight; it involves one's "awakened nature" (*wuxing* 悟性). Here consciousness and being have been expanded to include as many possible realities and lives as possible. Insight must be "ecological," in the sense that one understands the various communities that one participates in and affects. Insight comes from a place both within and beyond oneself.

Returning to the internet as a resource for understanding Daoism, there are few websites that are actually dedicated to considering and re-presenting the Daoist tradition *as a tradition,* as a Chinese *religious* tradition deserving respect and consideration. Without an understanding of such historical precedents, Daoism in the West will

[5] This emphasis on dreaming and awakening exerted a profound influence on the Chan 禪 (Zen) Buddhist tradition, wherein one finds the parallel notions of delusion and enlightenment.

simply be a fabrication, a fantasy and a fiction.[6] This does not mean that there should not be adaptation and modification; change necessarily occurs when a religious tradition enters a new cultural context and when religious practitioners have different concerns and motivations. But it does mean that without a connection and collective memory such "innovations" become meaningless names. And as Kongzi 孔子(Confucius) reminds one in chapter thirteen of the *Lunyu* 論語(Analects), the "rectification of names" (*zhengming* 正名) is essential. A river is not a "river" without certain qualities. Beyond this, chapter one of the *Zhuangzi* 莊子 emphasizes that "names are the guest of reality" (*ming zhe shi zhi bin ye* 名者實之賓也). Much of "popular Western Taoism" should probably be named something else.[7]

In terms of beneficial **internet resources,** first there is the Daoist Studies website (www.daoiststudies.org), which is a collaborative academic site. This site enables people to follow recent developments in the field of Daoist Studies. For reliable historical information, one may access a number of other sites. These include the Center for Daoist Studies; Taoist Culture & Information Centre; "Taoist Studies in the World Wide Web"; "Taoism Information Page"; "Fabrizio Pregadio's Homepage"; "Russell Kirkland's Homepage";

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[6] Thus, one might suggest that there is a "new religious movement" (NRM) that could be called "popular Western Taoism", with "Taoism" pronounced with a hard "t" sound. See Siegler 2003; Komjathy 2006.

[7] This has already happened. Many organizations are now calling themselves "Tao groups." Similarly, one should recognize the presence of "Qigong movements" and "Tai Chi Chuan movements" in America.

"The Golden Elixir"; and Taoist Restoration Society.[8] An annotated guide may be found on the Center for Daoist Studies website (www.daoistcenter.org/weblinks.html). Many of these sites also contain helpful links to other organizations and resources. For those attempting to find information on Daoist teachers and organizations in North America, one may access the lists contained on the websites of the Center for Daoist Studies, Taoist Restoration Society, and Pluralism Project.

As many high-level resources are available, it is unnecessary to give a comprehensive account of the Daoist tradition here. However, some **foundational knowledge of Daoism** is required. Any interpretation must be evaluated based on its accuracy, viability, as well as breadth and depth of coverage. To begin, there is one misinterpretation of Daoism that is so widespread as to be epidemic.[9] This centers on the distinction between "philosophical Daoism" and "religious Daoism," with the former being constructed as "original" and "pure" Daoism and the latter being identified as a ''corrupt" and "degenerate" adjunct

[8] The website of the Taoist Restoration Society (TRS) is recommended for getting some information on Daoism in contemporary China and a "taste" of Daoism in America. However, potential participants are forewarned that the organizers of this website have a particular agenda and that contributors often evidence a fairly superficial understanding of Daoism as a Chinese religious tradition.

[9] This outdated interpretative framework is, unfortunately, perpetuated in Julian Pas' *Historical Dictionary of Taoism* (1998). For a critical review see the Review Section at the Daoist Studies website. For discussions of such interpretative issues in Daoist Studies, especially key questions such as "Who is a Daoist?" and "What is Daoism?", see Creel 1956; Sivin 1978; Saso 1978; Strickmann 1980; Thompson 1993; Kobayashi 1995; Kirkland 1997; 2000; 2004; Clarke 2000; Chinese Taoist Association 2002; Kohn and Roth 2002; Komjathy 2002; 2005; 2006; Wang 2005; Yin 2005.

to the former. Some also mistakenly equate "philosophical Daoism" with the Chinese *daojia* 道家(lit., "Family of the Way") and "religious Daoism" with the Chinese *daojiao* 道教 (lit., "Teachings of the Way"). With regard to the former, the Western construction of "philosophical Daoism" has no correlation to the Chinese term *daojia,* a taxonomic category used by Han historiographers as a way of classifying texts and as a veiled reference to the Huang-Lao tradition. With regard to the latter, the use of *daojiao* as a designation for a self-conscious Daoist religious tradition did not emerge until the fifth century C.E. This occurred in the struggle for imperial patronage and court influence, in attempts to distinguish "Daoism" from Buddhism. It was also employed as a legitimizing factor in Kou Qianzhi's 寇謙之 (365-448) reform movement known as the New Way of the Celestial Master, also known as the "Northern Celestial Masters." That is, there are no theoretically grounded, historically accurate, or anthropologically relevant referents for the Western distinction between "philosophical Daoism" and "religious Daoism." Moreover, this bifurcated interpretative framework fails to consider the complexity and diversity of the Daoist tradition. Any bimodal (bipolar) understanding of Daoism should be discarded. Moreover, *there is no such thing as philosophical Daoism.* Philosophical Daoism is wholly a modern Western construct that has no correspondence to actual historical events or personages.[10] From its "beginnings," here

[10] When I say that "philosophical Daoism is a complete fiction" I am speaking historically in terms of the Chinese religious tradition *which is* Daoism. However, if one were to expand the discussion to include contemporary developments, it is clear that there are individuals, both Chinese and Western, who consider themselves "philosophical Daoists." One such individual is Liu Xiaogan 劉笑敢 (b. 1947). Internet groups, or "web-rings," such as the Circle of Wandering Daoists fall into this category as well. While such individuals are clearly applying classical Daoist "ideas"

dated to the Warring States period (480-222 B.C.E.), "Daoism" was a "religious tradition."[11] "Religion" here is not used in a restrictive sense as a veiled reference to Catholicism, that is, as a highly structured institution with priestly hierarchies and ritualistic activities, although such characteristics are clearly part of many religious traditions (including certain movements in organized Daoism). As I use the term, "religion" involves an *interaction* between the human dimension and the sacred dimension(s), often through trans-rational responses.[12] This "definition" suggests that the core of religious traditions centers on "mystical experiences" or "encounters" with that which a given community defines as "sacred'' or as "ultimate reality."[13] It centers on a "more." This does not entail that other, non-

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to modern intellectual and social needs, much of their authority rests on the highly questionable claim of representing "original Daoism." One must also reflect upon the domestication, colonization and fantasization involved in such appropriative agendas. Far too many, the majority in fact, of Western publications, academic and popular, fall into this category, usually under the guise of "intellectual history" or "comparative philosophy."

[11] For many historians, it is problematic to speak of "Daoism," which in that reading is understood as an organized tradition with a self-conscious collective identity, before the second century C.E. This view centers on Zhang Daoling 張道陵 (fl. 142 C.E.?) and the early Tianshi 天師 (Celestial Masters) movement. This view is misguided for two important reasons. First, it neglects historical precedents (see below); second, one could argue that "Daoism" was not an organized tradition with a self-conscious identity until the early medieval period (see Kobayashi 1995; Kirkland 1997; Kirkland 2004).

[12] This definition is indebted to the work of Rudolf Otto, William James, Mircea Eliade, and Paul Tillich.

[13] What exactly the "sacred dimension" is depends of the Daoist sub-tradition involved. There are also different types of "mystical experiences" in Daoism. For instance, Warring States adepts were directed towards "unification," while early Shangqing 上清 (Highest Clarity) practitioners aimed at joining a celestial bureaucracy. On types of Daoist mysticism see Kohn 1992.

mystical experiences, such as a feeling of communal belonging, are not equally valid and important. What it does suggest is that, especially emicly speaking, many forms of communal organization fail to *re-member* such connections with the sacred. My claim that **"Daoism is a religious tradition"** from the very beginning is based on both a close reading of classical Daoist texts, such as the *Daode jing* 道德經 (Scripture on the Dao and Inner Power) and *Zhuangzi* 莊子 (Book of Master Zhuang), and a more comprehensive understanding of the tradition as a whole.[14] With regard to the former, these texts, which are held up as *the* representative works of "philosophical Daoism," contain references to specific techniques, stage-based training regimens, specific types of experiences, and accounts of successful and venerated models for "realizing the Dao" (*dedao* 得道). In addition, there are clear references to specific master-disciple lineages in the *Zhuangzi,* and I would argue that *the very existence* of the relevant texts, being anthologies of earlier oral teachings, provides evidence for self-conscious religious communities that focused on the unnamable mystery and all-pervading numinosity of the Dao as their ultimate concern.

[14] Two additional points should be made. First, the modern Chinese approximation of the Western category "religion" is zongjiao 宗教, literally meaning the "teachings of the ancestors." That is, in a Chinese context, "religion" is understood as involving a community that is both corporeal and spiritual. Second, my suggestion that religion involves an interaction between the human dimension and the sacred dimension would, arguably, be recognized and accepted by practicing Daoists. As will become clear, most Daoist movements originated in divine revelations, most notably from gods and immortals. For the moment, it is enough to note the importance of talismans (fu 符) in the Daoist tradition. Like a talisman, the Daoist adept's practice culminates in a joining of two things that were originally unified but which have become separated over time.

While many scholars comment on the "received view" of Daoism as misleading, obsolete, and wholly inadequate,[15] an inevitable question arises: what alternative interpretative frameworks are available? First, I think that the response of excluding everything before the Tianshi 天師 (Celestial Masters) movement, the "first organized Daoist tradition," is misguided.[16] Without an understanding of earlier historical precedents, such as the classical texts, medical and hygiene practitioners, as well as Han-dynasty "formula masters" and seekers of "immortality," much of the later, fully organized Daoist tradition seems nonsensical and may be incomprehensible. In addition, an emic or insider's view of the tradition would recognize many of these pre-Han dynasty developments as "Daoist."

The most fully developed alternatives center on a **periodization model.** The first scholar to fully articulate such a model was Russell

[15] For a summary see Kirkland 1997; Komjathy 2002a.

[16] Early advocates of this position included Michael Saso (b. 1930) and the late Michel Strickmann (1942-1994). Their positions (especially Saso's claims concerning "orthodoxy" [*zheng* 正 versus *xie* 邪]挾,"Daoist" as only referring to "Daoist priests" [*daoshi* 道士], and the necessity of receiving "registers" [*lu* 錄]) have influenced popular interpreters of the Daoist tradition such as Liu Ming of Orthodox Daoism in America (ODA) and Brock Silvers of the Taoist Restoration Society (TRS). Recently, there has been a movement towards a postmodern and hyper-relativistic claim that the category "Daoism" is simply a modern Western construction. This position evidences the influence of popular discourse strategies, so much so that it too might be categorized as "popular Western Taoism." Such a view is historically untenable and contains hidden political consequences as well. Many responses are possible. One could point towards the continuous historical compilation of Daoist textual collections, beginning with Lu Xiujing 陸修靜(406-477). Similarly, from the early medieval period onward, there were attempts to establish ordination ranks, which centered on a hierarchical ordering of various Daoist sub-traditions. Such endeavors represent attempts to establish parameters for religious identity and participation. For discussions of the issue of "Daoist identity" see Kohn and Roth 2002; Miller 2003, 16-35; Kirkland 2004; Komjathy 2004.

Kirkland (1997). In its most recent expression, Kirkland's periodization model consists of two major and four minor divisions:

I. Classical Daoism
II. Later Daoism
    1. Early Daoist Movements
    2. Aristocratic Daoism
    3. Ecumenical Daoism
    4. Late Imperial Daoism

(Kirkland 2002)[17]

This model and similar ones (Kohn 1998; 2000b; Miller 2003) offer viable alternatives, but from my perspective Kirkland's proposed schema, especially its two-part primary division, does not fully express the historical complexity. We need to consider and familiarize ourselves with the entire Daoist tradition, beginning with "classical Daoism" and ending with contemporary Chinese and non-Chinese developments as well as the history of Daoist Studies (including its categorizations and self-representations). Developing the periodization model further, I would propose the following:

I. Classical Daoism
II. Early Daoism
III. Early Medieval Daoism
IV. Late Medieval Daoism
V. Late Imperial Daoism

[17] Kirkland's article also provides helpful descriptions of the characteristics of each of these periods.

VI. Modern Daoism
VII. Contemporary Daoism

These would correspond roughly to major watersheds for Daoism in Chinese dynastic and post-dynastic history: (I) Warring States (480-222 B.C.E.), Qin (221-207 B.C.E.) and Early Han (202 B.C.E.-9 C.E.); (II) Later Han (25-221 CE.)； (III) Period of Disunity (221-581)[18] and Sui (581-618); (IV) Tang (618-906), Song (Northern: 960-1126; Southern: 1127-1279),[19] and Yuan (1260-1368); (V) Ming (1368-1644) and Qing (1644-1911); (VI) Republican (1912-1949; 1949-) and Communist (1949-). Period VII encompasses more contemporary developments in mainland China, Hong Kong, and Taiwan. It also includes the transmission and transformation of Daoism in other Asian, European, and North American contexts, as well as the establishment of the field of Daoist Studies throughout the world. While helpful, such periods should not lull one into believing that they encompass the dramatic changes that occurred between, for instance, the Tang and Song periods.

We may now turn toward a **survey of Daoist history**.[20] Any adequate discussion of Daoism must begin, at least, with the **"classical**

[18] The "Period of Disunity" consists of a wide variety of Chinese and non-Chinese divisions.

[19] This division is slightly misleading, as China was never unified under the Song. For instance, the Jurchen Jin dynasty (1115-1234) conquered north China and forced the establishment of the Southern Song. This was the period of Chinese history when the Quanzhen 全真(Complete Perfection) movement emerged.

[20] Helpful timelines of Daoist history may be found in Pas 1998; Kohn 2001a; Komjathy 2005. The present overview is indebted to the various contributors to the *Daoism Handbook* (Kohn 2000).

period."[21] This historical phase corresponds to the Warring States period (480-222 B.C.E.) through the Early Han (202 B.C.E.-9 C.E.). With regard to Warring States "Daoism," the most commonly discussed (and translated) texts are the *Laozi* 老子(Lao-tzu; Book of Venerable Masters; abbr. LZ), more commonly known as the *Daode jing* 道德經 (Tao-te ching; Scripture on the Dao and Inner Power; abbr. DDJ), and *Zhuangzi* 莊子 (Chuang-tzu; Book of Master Zhuang; abbr. ZZ).[22] The former is associated with Laozi 老子(Master Lao or the Old Master), while the latter is attributed to Zhuang Zhou 莊周. In terms of traditional attribution and biographical material, the standard source is chapter sixty-three of the *Shiji* 史記 (Records of the Historian) at least partially compiled by Sima Tan 司馬談, Grand Astrologer of the Han court during the early years of Emperor Wu's reign (r. 141-87 B.C.E.), and completed by his son Sima Qian 司馬遷 (ca. 145-86 B.C.E.). The *Records of the Historian* tells us that Laozi was a man of Chu 楚 with the surname Li 李, given name Er 耳, personal name Boyang 伯陽, and posthumous name Dan 耽. Thus, Laozi is sometimes known as Li Er 李耳 or Lao Dan 老耽. In this

[21] Note that in Miller's (2003) formulation, "classical Daoism" refers to "early Daoism" in my framework.

[22] The *Daode jing* was, like similar classical texts, originally called the *Laozi* 老子 (Book of the Venerable Masters). It first became a "classic" (*Jing* 經) in the Han dynasty, under the imperial sanction of Emperor Jing (r. 156-141 B.C.E.). Nonetheless, the title *Daode jing* appears not to have been widely recognized until later, towards the close of the Han period. In the Tang dynasty (618-906) its canonical status was reaffirmed, when it was added to the imperial examination system. Traditionally speaking, "Laozi" refers to a pseudo-historical figure, concerning whom modern scholarship has demonstrated was a composite of a variety of historical personages and largely a response to the growing authority of the Ruists ("Confucians"). For Daoist adherents, Laozi may still occupy a venerated position as a "place-holder" for the classical tradition.

account, Laozi is said to have been an archivist of the Eastern Zhou dynasty (770-256 B.C.E.) and a senior contemporary and teacher of Kongzi 孔子 (Confucius; ca. 551-ca. 479 B.C.E.). The same chapter of the *Records of the Historian* explains that Zhuangzi (Master Zhuang) was a man from Meng 蒙 with the family name Zhuang 莊 and given name Zhou 周. Concerning these personages, there is general agreement in modern scholarship: Laozi was a composite figure, and is thus pseudo-historical, while Zhuang Zhou was an actual historical figure.[23] Relating these personages to their related texts, modern scholarship divides the received version of the *Zhuangzi* into a number of distinct textual layers; for our purposes, we may note that the so-called "inner chapters"(1-7) are attributed to Zhuang Zhou. In contrast, the *Laozi* or *Daode jing* is seen as an "anthology," with no identifiable author and containing a wide variety of textual layers.[24] This is partially a result of its varied content and partially a result of recent archaeological finds.[25]

While the *Daode jing* and *Zhuangzi* are frequently elevated as the most representative texts of "classical Daoism," recent revisionist

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[23] For an excellent discussion of the development of this myth concerning Laozi see A.C. Graham's "The Origins of the Legend of Lao Tan"(1986), reprinted in Kohn and LaFargue 1998. For Laozi's place in the Daoist tradition see Livia Kohn's *God of the Dao (\998).*

[24] For an attempt to historically contextualize the *Daodejing* see Michael LaFargue's *The Tao of the Tao Te Ching (1992).*

[25] These include the manuscripts found at Mawangdui 馬王堆(datable to at least 168 B.C.E.) and at Guodian 郭店 (datable to at least 300 B.C.E.), with the latter sometimes referred to as the "Bamboo Laozi." Translations and studies of the Mawangdui manuscripts may be found in Lau 1989 and Henricks 1989. The Guodian fragments, which show marked contrasts with the received and standard editions of the *Laozi,* have been translated in Henricks 2000. For academic articles see Allan and Williams 2000.

scholarship by Harold Roth and others would include parts of other important texts as well, including the *Guanzi* 管子 (Book of Master Guan), *Huainanzi* 淮南子 (Book of the Masters of Huainan), and *Lüshi chunqiu* 呂氏春秋 (Spring and Autumn Annals of Mister Lu).[26] Roth refers to this early form of "Daoism" or "proto-Daoism" as "inner cultivation lineages."[27] Many of these texts provided foundational cosmologies, principles, practices, and models for later organized forms of Daoism. For instance, the quietistic approach to self-cultivation, advocated in such texts as the "Neiye" 內業(Inward Training; abbr. NY) chapter of the *Guanzi,* reemerges in the Tang-dynasty Clarity-and Stillness (*qingjing*清靜) literature and in Sima Chengzhen's 司馬承禎 (647-735) emphasis on self-observation and emptiness meditation. While such revisions are important for giving us a fuller appreciation of classical Daoism, it should also be pointed out that in the later Daoist tradition the *Daode jing* occupied a most important position. Over one hundred extant commentaries, both complete and partial, are housed in the Ming-dynasty Daoist Canon (see Robinet 1977; 1998; 1999). In addition, there is the Dunhuang 敦

[26] The *Liezi* 列子(Book of Master Lie) is often placed in the classical period. However, although the received text contains some early material, especially from the *Zhuangzi,* the *Liezi* was compiled in the fourth century C.E. For a catalogue and historical annotations of translations of Daoist texts see Komjathy 2003b.

[27] This section is a concise outline of "Daoist history." Here one should remember that every view is partial. For details concerning the worldviews, practices, goals, and ideals of these and later Daoist texts, adepts, and communities see the introductions mentioned above. It should also be mentioned that the history of Daoism is fundamentally court history, that is, the history of Daoists who had some interaction with or recognition from Chinese imperial courts. Very little work has been done on Daoist eremitic (hermit) traditions, or, to borrow a category from Ken Cohen, on mountain Daoists. On Cohen's distinction between "courtly Daoism" and "mountain Daoism" see *The Empty Vessel* 2.1 (Winter 1995), 10. Some relevant information on lesser known Daoists may be found by reading Daoist hagiographies (biographies of saints). See Berkowitz 2000; Campany 2002; also Porter 1993.

煌 manuscript of the *Laozi Xiang'er zhu* 老子想爾注 (Xiang'er Commentary on the *Laozi;* DH 56), an early Tianshi 天師 (Celestial Masters) commentary.[28]

It was also during the classical period that a number of religious tendencies and movements emerged that would influence and set patterns for the first organized Daoist movements. Such historical precedents included a variety of models: therapeutic or medical, magico-religious, and self-divinization. The Early Han witnessed the codification and standardization of earlier medical traditions. Previous to the Early Han, there were a number of conceptions of and related treatment modalities for "disease" (*bing* 病),[29] "ancestral" (disease as caused by discontented ancestors) and "demonic" (disease as caused by malevolent entities) for example. During the Han, a new model emerged and gained orthodoxy; this centered on correlative and naturalistic explanations. In this model, disease was caused by harmful external influences, such as wind and cold, which generated

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[28] The numbering system for citing Daoist texts follows the *Title Index to Daoist Collections* (Komjathy 2002b). "DZ" refers to the Ming-dynasty (1368-1644) Daoist Canon, with numbers paralleling those found in Kristofer Schipper's *Concordance du Tao-tsang.* Other abbreviations utilized are the following: Dunhuang 敦煌 manuscripts (DH), *Daozang jiyao* 道藏輯要(JY), *Daozang jinghua lu* 道藏精華錄 (JHL), *Daozang jinghua* 道藏精華 (JH), *Zangwai daoshu* 藏外道書 (ZW), *Qigong yangsheng congshu* 氣功養生叢書 (QYC), and *Daozang xubian* 道藏續編 (XB).

[29] According to Unschuld (1985), *"Illness* is defined here as the primary experience, that is, the subjectively perceived feeling of indisposition that can lead to changes in behavior. *Disease,* by contrast, is a socially determined, a conceptual reshaping of the primary experience of illness. Therefore, I characterize disease as a clearly defined deviation, within a specific set of ideas concerning the causation, character, and treatment of illness, from a normal state of human existence, however that normal state may be conceived. As a result, certain manifestations of illness, may, in different societies, be comprehended as completely different diseases" (19; italics in original).

internal imbalance. However, in this model, unlike the ancestral or demonic, there was no malevolent or "subjective" intent involved. This model became the centerpiece of "classical Chinese medicine," as documented in the *Huangdi neijing* 黃帝內徑 (Yellow Thearch's Inner Classic) texts. The emphasis here on naturalistic explanations and systems of correspondences (e.g., the Five Phases [*wuxing* 五行]) provided much foundational knowledge for later Daoism (see Unschuld 1985). Similarly, the Early Han witnessed an increase in the authority of longevity practitioners, "formula masters" (*fangshi* 方士), and immortality seekers. The search for "immortality" or "transcendence" (*xian* 仙)[30] centered on two paradisiacal, terrestrial realms called Penglai 蓬萊 Island (in the east) and Mount Kunlun 惠斋 (in the west).[31] The latter was overseen by Xiwangmu 西王母 (Queen Mother of the West), who occupies a central place in the

[30] There is some disagreement concerning the most accurate translation of *xian* 仙. Some prefer "immortal," while others advocate "transcendent." Neither is wholly successful. In the present context, I follow the more conventional rendering of "immortal." In terms of etymology, this character contains the *ren* 人 ("person") radical with *shan* 山 ("mountain"). A variant (僊) consists of *ren* 人 with *xian* 翾 ("flying"). Etymologically, then, a *xian* is a mountain recluse and/or an ecstatic traveler.

[31] Mountains, both mythical and actual, have occupied a central place in the Daoist tradition from its earliest historical phases to the present. For example, the early Celestial Masters were associated with Heming shan 鶴鳴山(Crane Cry Mountain; Sichuan), Highest Clarity with Maoshan 茅山(Mount Mao; Jiangsu), and Complete Perfection with Kunyu shan 昆嵛山 (Mount Kunyu; Shandong) and Zhongnan shan 鍾南山(Zhongnan Mountains; Shaanxi). Daoists also recognize the Five Sacred Peaks, associated with the five directions: Huashan 華山(Shaanxi; west); Taishan 泰山(Shandong; east); Hengshan 恒山(Shanxi; north); Hengshan 衡山(Hunan; south); and Songshan 嵩山(Henan; central). On the place of mountains in Daoism see Hahn 2000. On the various levels of meaning of mountains in the tradition see Schipper 1993. An account of encounters with contemporary Buddhist and Daoist hermits appears in Porter 1993.

larger Daoist tradition as well. Mythically speaking, the Queen Mother of the West was believed to oversee a celestial park, which contained the famed Turquoise Pond (*yaochi* 瑶池) and orchard where the "peaches of immortality" (*xiantao* 仙桃) were grown. These peaches came to fruition every thousand years or so, during which time a huge feast would be held and anyone who acquired one of the blessed fruit instantly became an immortal.[32] In some sense, in the Early Han we see the major patterns of religious activity that would come to dominate the organized Daoist tradition more generally: personal health and healing, magical control of the cosmos, and the search for self-divinization.

The classical period was followed by the **"early period**." During the Later Han (25-221 C.E.), numerous communal and populace-supported forms of religious activity began to become more viable and widespread. It was also during this time that Laozi 老子 became imperially recognized as the deity Laojun 老君 (Lord Lao). Thus, there is the *Laozi ming* 老子銘 (Inscription for Laozi), which dates from 165 C.E. and is the earliest textual evidence about the official cult of a deified Laozi. The Han dynasty also embraced and disseminated the Confucian conception of the Mandate of Heaven (*tianming* 天命). In this socio-political and cosmological system, the emperor was viewed as the Son of Heaven (*tianzi* 天子) and given a certain mandate or fate by Heaven, an anthropomorphized cosmological process. Here the emperor was a kind of cosmocrat or

[32] A highly entertaining account of this mythology appears in the sixteenth-century Chinese novel *Xiyou ji* 西游記 (Journey to the West). The first volume (1977) of Anthony Yu's (b. 1938) four-volume English translation is recommended.

thearch, like the earlier Shangdi 上帝.[33] Abnormal or extraordinary astronomical and natural occurrences, such as comets, floods, famines, etc., were often seen as signs that the imperial house had lost its mandate and that the time had come for rebellion.

In the Han context of popular interest, two movements became established that proved to be seminal for a more fully organized and coherent Daoist tradition. The first movement was called Taiping dao 太平道 (Way of Great Peace), which has also received the designation of the "Yellow Turbans" in Western literature. The latter name is somewhat misleading because of the image that "turban" conjures up. Members of the Way of Great Peace wore yellow kerchiefs (*huangjin* 黃巾) on their heads as a sign that the "azure" (*qing* 清), the color of the Wood phase, of the Han imperial house was becoming overtaken by the "yellow" (*huang* 黃), the color of the Earth phase, of the Way of Great Peace. Here one notices the presence of correlative cosmology as a way of mapping socio-political and cosmic transformations. Based in northeast China, the Way of Great Peace centered on Zhang Jue 張角 (fl. 2nd c. C.E.) and a millenarian conception of the world as found in the *Taiping jing* 太平經 (Scripture of Great Peace; partially lost; DZ 1101). It was imagined and taught that the world would be transformed, through violent revolution, into an era of "Great Peace." The rebellion was initiated in 184 C.E., *jiazi* 甲子 or the first year of the 60-year Chinese calendar.[34]

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[33] A thearch (thē/ərk) is a divine ruler. Like theophany (divine manifestation) and theology (study of divinity), thearch is derived from the Greek *theós,* meaning "god" and relating to divinity more generally.

[34] On Chinese astronomy and astrology see Walters 2002 (1987).

Although this rebellion was defeated in the late second century, it established a model of prophetic world-leaders, cosmological rebellion, and Utopian vision. It also severely weakened the power of the Han imperial house to the point that it was eventually overthrown.

Perhaps more importantly for the Daoist tradition, the Han's concern for this rebellion impeded its ability or willingness to address additional developments in the southwest. Around the same time as the Way of Great Peace was attempting to gain control, a new movement became organized in present-day Sichuan. This was the Tianshi 天師 (Celestial Masters) movement, which is frequently elevated to the position of the "first organized Daoist tradition."[35] According to traditional accounts, in 142 C.E. Zhang Daoling 張道陵 (fl. 140 C.E.?) received a revelation from Laojun 老君(Lord Lao), the "deified" form of Laozi and personification of the Dao, on Mount Heming 鶴鳴(Crane Cry).[36] The Celestial Masters are sometimes referred to as Zhengyi 正一 (Orthodox Unity), because of a description of its founding revelation as the "covenant of orthodox unity" (*zhengyi mengwei* 正一盟威), or Wudoumi dao 五斗米道 (Way of Five Pecks of Rice), because of its supposed requirement of

[35] One should recognize the historical contingency of such claims. One might, in turn, wonder what would have happened, and what scholars would be claiming, if the Way of Great Peace or Red Eyebrows (*chimei* 赤眉) movements survived the Han crackdown and set the foundations for later "Daoism." That is, the elevation of the Celestial Masters and Zhang Daoling is retrospective history. This is partially the result of a Christian influence that desires to identify a "founder,"such as Laozi or Zhang Daoling.

[36] Zhang Daoling and Zhang Jue were not related, and it seems that the movements were unaware of each other during their initial formation.

an annual donation of "five pecks of rice" for religious membership. During Lord Lao's revelation, Zhang was appointed as terrestrial representative, the "Celestial Master," and given healing powers as a sign of his empowerment. The movement in turn became patrilineal, passing from Zhang Daoling to his son Zhang Heng 張衡 and then to his son Zhang Lu 張魯（fl. 190 C.E.). The Celestial Masters established "parishes" (*zhi* 治）with hierarchically-ranked followers, wherein the so-called libationers (j*ijiu* 祭酒）were highest. The intent was to establish "seed people" (*zhongmin* 種民）that would populate an earth made ritually and morally pure. If a moral transgression occurred, a purification rite was performed. This consisted of an officiating priest utilizing his "registers" (*lu* 籙), which gave him or her power over specific spirits, and submitting "petitions" (*zhang* 章）to the so-called Three Bureaus (*sanguan* 三官)of heaven, earth, and water. This was done through burning, burial, and submersion. In addition, the individual was secluded in "pure rooms" or "chambers of quiescence" (*jingshe* 靜舍; *jingshi* 靜室/靖室; or *qiugshi* 清室), where they were supposed to reflect upon their actions and repent. Little original source material survives from this formative phase of the Celestial Masters. We do have the *Xiang'er* 想爾 (Thinking of You; DH 56) commentary on the *Laozi,* perhaps composed by Zhang Lu, and its related precepts (*jie* 戒）as found, for instance, in the first section of the *Taishang laojun jinglii* 太上老君經律 (Scriptural Statutes of the Great High Lord Lao; DZ 786). However, as there is some doubt concerning the date of the *Xiang'er* and as so little early Celestial Masters' material survives, claims concerning this tradition must remain tentative. In particular, recent claims by Western teachers to represent the lineage of Zhang Daoling are highly questionable, especially as the Celestial Masters lineage was broken

(and later reconstructed) during the Tang dynasty (618-906) and as contemporary Zhengyi traditions in North America evidence profound influences from contemporary Taiwanese adaptations and from a variety of other religious systems.

Nonetheless, the religious program of the Celestial Masters proved convincing and viable. After the armies of Zhang Lu were defeated by those of the famous general Cao Cao 曹操, the eventual founder to the Wei dynasty (220-265), in 215, the Celestial Masters were forced to migrate to various parts of northern and southern China. This brings us to the "early **medieval** period." It was during this period that Buddhism established viable monastic institutions, with its alternative models of self-identity and religious participation. Many Buddhist texts were translated and disseminated, and Buddhism began its transformation from a "barbarian religion" to a fully sinicized tradition.[37] Parallel to these developments, new types of scriptures, new forms of religious expression, were introduced. These included monastic rules (*vinaya*) and the *Prajñāpāramitā* (Perfection of Wisdom) texts, which emphasized the emptiness (Skt: *śūnyatā*\ Chn.: *kong* 空/*xu* 虛) of independent existence.

It was also in the early and early medieval periods that we see the beginnings of Daoist commentary literature. Four early commentaries

[37] When Buddhism first entered China in the second century C.E., it was seen as "barbarian" and an assault against "Confucian" traditions. By becoming monastics and renouncing the mundane world, from a Confucian, and thus a traditional Chinese, perspective, Buddhists forsook their moral and social obligations to the family. Part of the "sinicization" of Buddhism involved the influence of Daoism, on which little research has been done. There was also the "Indianization" of Chinese religious traditions.

on the *Daode jing* and one on the *Zhuangzi* are still extant. The earliest surviving Daoist commentary in the Daoist Canon is that of Yan Zun 嚴遵 (Junping 君平; fl. 83 B.C.E.-10 C.E.), originally Zhuang Zun 莊遵. Yan Zun was a formula master who spent his days in the markets of present-day Chengdu engaging in divinization and prognostication and his nights teaching cultured elite the intricacies of the Chinese literati tradition. For instance, he taught Yang Xiong 揚雄 (53 B.C.E.-18 C.E.), a famous Han poet and philosopher. He in turn wrote the *Laozi zhigui* 老子指歸(Essential Meaning of the *Laozi;* a.k.a. *Daode zhenjing zhigui* 道德真經指歸; DZ 693), which reads the *Daode jing* from the perspective of a magico-religious practitioner. Unfortunately, very little work has been done on this text. We also have the above-mentioned Celestial Masters' commentary, namely, the *Laozi Xiang'er zhu* 老子想爾注疰(Xiang'er Commentary on the *Laozi;* DH 56). Next, there is the commentary by Heshang gong 河上公 (Master Dwelling-by-the-River; fl. 160 B.C.E.?); this is the *Laozi zhangju* 老子章句 (Commentary by Chapter and Verse on the *Laozi;* a.k.a. *Daode zhenjing zhu* 道德真經註 [Commentary on the Perfect Scripture on the Dao and Inner Power]; DZ 682). This commentary is one of the most influential Daoist commentaries; here Heshang gong reads the *Daode jing* as a manual on longevity (*yangsheng* 養生) techniques, including its references to the "country" as relating to internal corporeal realities. Finally, we have the *Daode zhenjing zhu* 道德真經註 (Commentary on the Perfect Scripture on the Dao and Inner Power; DZ 690) by Wang Bi 王弼 (226-249), a member of the Xuanxue 玄學 (Profound Learning) hermeneutical tradition, which is sometimes incorrectly identified as "Neo-Daoism" in earlier Western scholarship. Here Wang Bi emphasizes cosmological aspects of the *Daode jing,* especially a distinction between "being"*(you* 有) and

"non-being" (*wu* 無) and the concept of emptiness (*kong* 空 / *xu* 虛). This commentary has exerted a profound influence on Western understandings of the text, so much so that it is the only commentary to have been translated into English more than once (Lin 1977; Rump and Chan 1979; Lynn 1999; Wagner 2003).[38] The earliest extant commentary on the *Zhuangzi* was also written by a member of the Profound Learning school; this is the *Nanhua zhenjing zhashu* 南華真經註疏 (Commentary on the Perfect Scripture of Nanhua; DZ 745) by Guo Xiang 郭象 (d. 312). This early hermeneutical model established a pattern that would eventually result in the composition of hundreds of commentaries on the *Daode jing*.

A wide variety of Daoist sub-traditions also developed during the so-called Period of Disunity (221-581). First, we know of a southern tradition with its roots in the Han-dynasty *fangshi* and immortality seeker movements. This is Taiqing 太清 (Great Clarity), a tradition of laboratory or operational alchemy (*waidan* 外丹; lit., "external elixir"). Great Clarity is known to us principally due to the efforts of its most well-known member, namely, Ge Hong 葛洪 (Baopuzi 抱朴子 [Master Embracing Simplicity]; 287-347). Ge Hong came from an aristocratic family based near Jiankang (present-day Nanjing). His grand-uncle, Ge Xuan 葛玄 (164-244), was a renowned *fangshi,* and his presence would play a major role in the later Lingbao 靈寶 (Numinous Treasure) tradition. Ge Hong wrote two seminal works,

[38] In fact, the prominence of this commentary in Western academic literature begs for a separate study. It tells us something important about dominant Western constructions of "Daoism." I would argue that Wang Bi's commentary represents what many Westerners *wish* the *Daode jing* means; it conforms to Western interpretations, scholarly and popular, of the text as "philosophy."

the *Baopuzi* 抱朴子 (Book of Master Embracing Simplicity; DZ 1185; DZ 1187) and the *Shenxian zhuan* _神仙傳 (Biographies of Spirit Immortals; JHL 89). The latter is a collection of some 100-odd hagiographies ("biographies of saints"), while the former is a *summa* of fourth-century religious traditions and related methods, providing information on the production of elixirs (*dan* 丹) through laboratory alchemy, the highest religious pursuit according to Ge. Great Clarity emphasized levels of attainment and involved the concoction of a mineral elixir, which consisted of highly toxic elements such as realgar, mercury, cinnabar, etc. The early traditions of laboratory alchemy, including the famous *Zhouyi cantong qi* 周易參同契 (Token for the Kinship of the Three According to the *Zhouyi*; DZ 999; 1001; 1008), continued to play a significant role even into the Ming dynasty (1368-1644).

Around this same time, certain literati and self-cultivation communities became prominent. One of the most famous groups was known as the "Seven Sages of the Bamboo Grove" (*zhulin qisheng* 竹林七聖). This group consisted of seven aristocrat recluses. The group established themselves on the estate of their leading member, Ji Kang 嵇康(223-262), who is known in Western literature as Xi Kang. The group engaged in a variety of leisure activities, including poetry and prose writing, drinking contests, as well as narcotic and psychedelic drug ingestion, with the latter including the notorious Cold Food Powder (*hanshi san* 寒食散). Such practices resulted in numerous visions of celestial realms, much of which is beautifully expressed in their highly-refined poetry. This group helped to establish a model of escapism and the literati-recluse.

Slightly later, with the forced migration of the Celestial Masters, many of its leaders began a gradual movement south. This eventually led to a division, which is commonly referred to as the "Northern Celestial Masters" and the "Southern Celestial Masters." The establishment of the Northern Celestial Masters centers on Kou Qianzhi 寇謙之 (365-448), who was trained in a Celestial Masters' family and received a revelation from Lord Lao in 415. According to this revelation, Kou was empowered to replace the Zhang lineage as Celestial Master and to reform many of the tradition's earlier practices. He eventually became recognized by the rulers of the Northern Wei dynasty (386-534), so much so that in 440 the emperor received Daoist initiation and changed his reign title to Taiping zhenjun 太平真君 (Perfected Lord of Great Peace). This moment in Daoist history is often described as a "Daoist theocracy," as it marked the first time that Daoism became state orthodoxy. Kou also established guidelines for Daoist conduct known as the "new code" (*xinke* 新科), which are still partially extant in the *Laojun yinsong jiejing* 老君音誦誡經(Precept Scripture of Lord Lao for Recitation; DZ 785).

Simultaneously, the members of the Celestial Masters who had migrated south began their interaction and competition with more firmly established southern traditions. As the Celestial Masters movement gained a foothold, new revelations and textual traditions emerged. The first was Shangqing 上清(Highest Clarity). In the 360s, members of the aristocratic Xu 許 family, Xu Mai 許邁 (b. 301), Xu Mi 許謐 (303-373) and his son Xu Hui 許翽 (341-ca. 370) hired the spirit medium Yang Xi 楊羲 (330-386?) to establish contact with Xu Mi's wife Tao Kedou 陶可斗. Through a series of revelations from

underworld rulers, divine officers, denizens of Huayang dong 華陽洞 (Grotto of Brilliant Yang), and former leaders of the Celestial Masters, Yang Xi described the organization and population of the subtle realms of the cosmos, particularly the heaven of Shangqing. Also deserving note is the presence of the deceased female Celestial Master libationer Wei Huacun 魏華存 (251-334) as a central figure in the early Highest Clarity revelations. These various celestial communications included specific methods for spirit travel and ecstatic excursions,[39] visualizations, and alchemical concoctions. A wide variety of texts are important for understanding the religious worlds of Highest Clarity, two of the most important being the *Dadong zhenjing* 大洞真經 (Perfect Scripture of the Great Grotto; DZ 6) and the *Huangting jing* 黃庭經 (Scripture on the Yellow Court; DZ 331; 332). The revelations were, in turn, written down by the Yang Xi and the Xu brothers in a calligraphic style that seemed divine. After some generations, the texts were inherited by Xu Huangmin 許黃民 (361-429) who disseminated them throughout the region. Then, Tao Hongjing 陶弘景（456-536), a descendent of Tao Kedou and an advanced Highest Clarity adept, came across an original manuscript and became inspired to collect them. Tao Hongjing had established a religious center on Maoshan 茅山 (Mount Mao; present-day Nanjing),[40] where he pursued alchemical and pharmacological studies. From there he traveled throughout southern China in search of the original Highest Clarity manuscripts. In the

[39] The importance of spirit travel and ecstatic excursions in early Highest Clarity recalls the earlier "Yuanyou" 遠遊 (Distant Roaming) poem in the *Chuci* 楚詞 (Lyrics of Chu). For a translation see Hawkes 1959.

[40] Because of Tao Hongjing's centrality in Daoist history and his residence on Maoshan, Shangqing is sometimes incorrectly referred to as the "Maoshan sect."

process, he developed a critical analysis of calligraphic styles for determining textual authenticity. His collection efforts resulted in the Zhen'gao 真誥縞(Declarations of the Perfected; DZ 1016).

Partially in response to these Highest Clarity revelations, in combination with the more pervasive influence of Mahāyāna Buddhism (including its bodhisattva ideal and vision of universal salvation), the Lingbao 靈寶 (Numinous Treasure) tradition developed. "Numinous Treasure" refers to a central belief that precious talismans created and maintain the cosmos. For our purposes, Numinous Treasure refers to the tradition established by Ge Chaofu 葛巢甫 (fl. 390s), a Highest Clarity adept and relative of Ge Hong. Ge Chaofu, who inherited the library of Ge Hong, claimed that the original Numinous Treasure revelation went back to Ge Xuan, and were thus older (=more authoritative) than the Shangqing revelations. Numinous Treasure centered on a cosmocrat (cosmic ruler) and magical manipulation of the cosmos. This cosmocrat, who resembles Mahāvairocana of the Buddhist Tantric tradition, was Yuanshi tianzun 元始天尊 (Celestial Worthy of Original Beginning); later, Yuanshi tianzun would become the center of a three-part pantheon known as Sanqing 三清（Three Purities/Three Pure Ones; also including Daode tianzun 道德天尊 [Celestial Worthy of the Dao and Inner Power] and Lingbao tianzun 靈寶天尊 [Celestial Worthy of Numinous Treasure]). Ge Chaofu emphasized levels of celestial realms, celestial administrators, and a host of divine beings, in combination with Han-dynasty correlative cosmology, *fangshi* ideas and practices, and Celestial Master ritual. A representative work documenting the magical dimension of Numinous Treasure is the *Lingbao wufu xu* 靈寶五符序 (Explanation of the Five Numinous

Treasure Talismans; DZ 388). These "five talismans" were the foundation for harmony and control, whether personal, communal, socio-political, or cosmological. Numinous Treasure also maintained soteriological aims, namely, the salvation of humanity as a whole. The scriptures of Numinous Treasure became codified by the Daoist ritualist and bibliographer Lu Xiujing 陸修爭 (406-477) in the so-called "Lingbao Catalogue." It was also Lu Xiujing who compiled the earliest known catalogue of Daoist texts, namely, the *Sandong jingshu mulu* 三洞經書目錄 (Catalogue of the Scriptures and Writings of the Three Caverns). As the name suggests, the central organizing principle was (and remains) a tripartite classification system known as the Three Caverns (*sandong* 三洞). Dating from at least as early as the fifth century, this system originally referred to three distinct or revelatory traditions: (1) Cavern Perfection (*dongzhen* 洞真), corresponding to the Highest Clarity tradition; (2) Cavern Mystery (*dongxnan*, 同玄), corresponding to the Numinous Treasure tradition; and (3) Cavern Spirit (*dongshen* 洞神), corresponding to the Sanhuang (Three Sovereigns) tradition.

The early medieval period also witnessed the development of monastic Daoism, again under the influence of Buddhism. At the end of the Northern Wei dynasty, members of the Northern Celestial Masters congregated in a newly established center in the Zhongnan mountains (near present-day Xi'an). This was Louguan 樓觀 (Lookout Tower Monastery; called Louguan tai 樓觀臺 today), which was founded by Yin Tong 尹通 (398-499?) and became the first Daoist monastery.[41] Yin Tong claimed descent from Yin Xi 尹喜, the

[41] See Livia Kohn's *Monastic Life in Medieval Daoism* (2003).

"guardian of the pass" who legend tells us received the *Daode jing* from Laozi as he left China for his western travels. Louguan eventually grew significantly and rose to prominence under the leadership of Wang Daoyi 王道一 (447-510). A number of visions of Lord Lao appeared there, which also helped to solidify the temple's place of importance in the geo-political landscape. Some representative works from Louguan include the *Laojun jiejing* 老君戒經 (Scriptural Precepts of Lord Lao; DZ 784), *Xisheng jing* 西昇經 (Scripture on Western Ascension; DZ 666; DZ 726), and *Chuanshou jingjie* 傳授經戒 (Transmission of Scriptures and Precepts; DZ 1241). Louguan Daoists also compiled encyclopedias, including the important *Wushang biyao* 無上秘要(Esoteric Essentials of the Most High; DZ 1138).

A final aspect of the early medieval period that deserves mention is the Buddho-Daoist debates. During the sixth century, a series of debates were imperially sponsored, with the intention of determining which religious tradition was doctrinally superior and which was most applicable to socio-political concerns. One occurred in 520 under the Toba-Wei (386-535) and the other in 570 under the Northern Zhou (577-581). In terms of the motivations of the Buddhists and Daoists, these debates were clearly attempts to gain imperial patronage and acquire political authority. Imperial sponsorship entailed increases in financial viability and cultural capital. The debates centered on the so-called "conversion of the barbarians" (*huahu* 化胡) theory, and the related text of the *Huahu jing* 化胡經 (Scripture on the Conversion of the Barbarians; partially lost; DH 76; ZW 738; 739) that is attributed to a certain Celestial

Master libationer Wang Fou (fl. 300).[42] The Daoist *huahu* theory held that after Laozi left China on his Western travels he eventually arrived in India where he became Śākyamuni Buddha, the historical Buddha. The first set of debates centered on the issue of dating. The Buddhists emerged victorious, making a convincing argument that the Buddha was in fact older than, and thus different from, Laozi. The second set of debates developed because of a proposal by a disenfranchised Buddhist monk named Wei Yuansong 衛元嵩 (fl. 570); Wei argued for a new Buddhist world order with the emperor as divine Buddhist ruler, the officials as the *sangha* (Buddhist community), and the people as the congregation. This entailed the dissolution of independent religious communities and laicization of clergy. Understandably, the Buddhists and Daoists scrambled to show the ways in which their present systems supported and could be used to support the state. Debates were held to determine whether or not to adopt Wei's proposal. The emperor in turn ordered reports evaluating the teachings, which resulted in the *Erjiao lun* 二教論 (Discourse on the Two Teachings; T. 2103, 52.136b-43c) and the *Xiaodao lun* 笑道言倫 (Discourse on Laughing at the Dao; T. 2103, 52.143c-52c). The latter was written by the ex-Daoist Zhen Luan 甄鸞 (fl. 570) and criticized various aspects of Daoist belief and practice. It is interesting to note that the title brings to mind chapter forty-one of the *Daode jing* which reads as follows: "When the superior adept hears about the Dao, he diligently practices it./When the average adept hears about the Dao, he doubts its actuality./When the inferior adept hears about the Dao, he laughs loudly." From a classical Daoist

[42] The character *hu* 胡 originally referred to a specific non-Chinese northern tribe. In later usage, it becomes a more general designation for any "barbarian"(non-Chinese) peoples.

perspective, Zhen Luan's work suggests ineptitude, and perhaps it is no coincidence that his given name could be misread as *luan* 亂 ("chaotic" or "rebellious"). The critique of Daoism that occurred within the debate did not persuade Emperor Wu 武(r. 561-578) of the Northern Zhou, who imagined a Daoist theocracy as a viable socio-political model. He established Tongdao guan 通道觀 (Monastery for Connecting to the Dao) as an official Daoist research center and supported Louguan research efforts. It was here that the first Daoist encyclopedia, the *Wushang biyao* 無上秘要 (Esoteric Essentials of the Most High; DZ 1138), and the *Xuandu jingmu* 玄都經目 (Scripture Catalogue of the Mysterious Metropolis; lost), a canonical collection of scriptures, were compiled. Such debates established one pattern of interaction among Daoists, Buddhists, and the state, including the devastating Yuan (1279-1368) debates of 1255 and 1258, which resulted in the burning and destruction of Daoist texts, textual collections, and printing blocks in 1281.

Although Wu's vision of a Daoist-based orthodoxy was rejected by the Sui dynasty (581-618), whose rulers adopted Buddhism, something else occurred during the Tang dynasty (618-907). The Tang dynasty marks a major watershed moment in Chinese history in general and Daoist history in particular. It also marks the beginning of the "**late medieval period**" in the periodization model advocated here. During the Tang, Daoism was accepted and sponsored as state orthodoxy. However, it should be remembered that international trade and a climate of cosmopolitanism characterized the cultural environment of the Tang dynasty. The Tang rulers were generally tolerant of and even fascinated by various religious traditions,

including Nestorian Christianity, Manichaeism, Tantric Buddhism, and Islam. Chang'an, the Tang capital, became a cosmopolitan center.

Nonetheless, many Tang emperors and their courts showed imperial favor for the Daoist tradition. As noted above, Lord Lao as the deified Laozi became central to the Chinese state as early as the Han dynasty. Similarly, the patterns of millenarian prophecy were also well established. During the beginning of the Tang, the rulers embraced a prophecy centering on a figure with the surname Li 李 (Li Hong 李洪) as the future Lord of Great Peace. Interestingly, Li was the surname of both Laozi (Li Er 李耳) and the founders of the Tang dynasty. Thus, the Tang rulers became linked with both Laozi, the preeminent figure in the Daoist tradition and now the Tang's own original ancestor, and the vision of a Daoist Utopia. Numerous miracles centering on divine appearances of Lord Lao occurred. One such vision took place at Bozhou 亳州, Laozi's supposed birthplace, where Lord Lao caused a withered cypress tree to bloom again. Miraculous material signs were also discovered throughout China and at various Daoist sacred sites; these included inscribed stones, divine statues, and images on walls and cliffs. Such discoveries, of course, helped to ensure continued imperial patronage for places such as Louguan. Tang emperors gave extensive privileges to the Daoists, offered lavish gifts to temples and monasteries, established a Daoist track in the imperial bureaucracy, sponsored Daoist collection efforts, honored Lord Lao with the title Xuanyuan huangdi 玄元皇帝 (Sovereign Thearch of Mysterious Origin), and aided the success of the tradition in general. Especially under Xuanzong 玄宗 (r. 713-755), Daoism flourished and membership grew extensively. A number of imperial princesses were given Daoist initiation in elaborate

ceremonies. Monasteries (*guan* 觀), first established between the fifth and sixth centuries, were staffed by Daoist priests and priestesses (*daoshi* 道士), who performed *jiao* 醮 ("offering") and *zhai* 齋 ("purification") rituals for integrating society and cosmos. The Tang dynasty also established a system of official control, including a state-controlled ordination system and legal codes governing religious behavior. It was in this context that the *Laozi* (Book of Venerable Masters) was formally elevated to the status of a *jing* 經("classic" or "scripture"), that is, the *Daode jing* 道德經(Scripture on the Dao and Inner Power). In addition, the *Daode jing* became required reading for the imperial examinations.

The Tang dynasty also witnessed the emergence of new forms of Daoist literature. The first set of texts may be referred to as "Clarity-and-Stillness literature." This series of texts includes the famous and highly influential *Qingjing jing* 清靜經 (Scripture on Clarity and Stillness; DZ 620). As the name indicates, the Clarity-and-Stillness texts focus on the cultivation and development of clarity (*qing* 清) sometimes rendered as "purity," and stillness (*jing* 靜), sometimes rendered as "tranquility." Drawing some inspiration from the earlier Buddhist *Xinjing* 心經 (Heart Sutra; T. 250-57), these texts emphasize self-cultivation and mystical realization through the establishment of internal serenity. Many of the related texts claim to be revelations from Lord Lao, containing the phrase "as spoken by the great high Lord Lao" (*Taishang laojun shuo* 太上老君說). It was also during the Tang that a variety of Buddhist-inspired and modified

forms of Daoist meditation emerged.[43] These texts often utilize the language of Clarity-and-Stillness texts to discuss meditation principles, but they also provide a level of detail fairly rare in earlier periods of Daoist history. The Tang-dynasty Daoist meditation texts most frequently emphasize emptiness (Skt.: *śūnyatā*; Chn.: *xu* 虛; *kong* 空) and a mind-based or consciousness-orientated form of realization. In this way, they move away from earlier Daoist concerns with the body and with physiological processes. Through the influence of Buddhist views, these meditation texts understand Daoist cultivation primarily in terms of consciousness and psychological processes.

With regard to major figures in Daoist history, a few important and representative ones will be discussed here. One such person was Sima Chengzhen 司馬承禎 (647-735), the twelfth patriarch of Highest Clarity Daoism. Highly respected and supported at the Tang imperial court, Sima Chengzhen is most well-known for his systematic discussions of meditation and personal refinement. This Tang-dynasty form of Highest Clarity meditation differs considerably from the earlier visualization (*cunxiang* 存想) methods. Sima Chengzhen's writings place primary emphasis on the mind and evidence a synthesis of Daoist and Buddhist meditation practices. In particular, we find the influence of Buddhist insight meditation (Skt.: *vipaśyanā*; Chn.: *guan* 觀) and a concern for the development of wisdom (Skt.: *prajñā*; Chn.: *zhi* 智). For instance, Sima's *Znowang lun* 坐忘論 (Discourse on Sitting-in-Forgetfulness; DZ 1036) maps out Daoist

[43] By the end of the Tang dynasty, all of the major forms of Chinese Buddhism had been established. These included Chan 禪 (Zen), Huayan 華嚴 (Avatamsaka; Flower Garland), Jingtu 淨土 (Pure Land), Zhenyan 真言 (Tantra), and Tiantai 天台.

meditation in terms of seven stages: (1) Respect and Trust; (2) Interception of Karma; (3) Taming the Mind; (4) Detachment from Affairs; (5) Perfect Observation; (6) Intense Concentration; and (7) Realizing the Dao. Although one notes much Buddhist influence, Sima Chengzhen clearly has a Daoist orientation. Interestingly, the title of the *Zuowang lun* refers to a passage on Daoist meditation that is found in chapter six of the *Zhuangzi*.

In addition to such models of self-realization, Daoism during the Tang dynasty maintained ritualistic and scholastic concerns. In this respect, Du Guangting 杜光庭 (850-933) stands out. Du Guangting lived at the end of the Tang dynasty, a time of radical socio-political upheaval. In the gradual disintegration of a unified Chinese empire that followed from such rebellions as that of An Lushan 安錄山 (755-763), Du set out to preserve and systematize earlier Daoist traditions. He compiled ritual compendia that became the basis for later forms of Daoist liturgy and hagiographies of outstanding Daoists, including the first hagiographical collection on female Daoists. This is the *Yongcheng jixian lu* 墉城集仙錄 (Records of Assembled Immortals from the Walled City; DZ 783). In addition, Du Guangting had a profound interest in the *Daodejing* and its commentarial tradition. He reviewed and collated more than sixty previous commentaries, dividing them into five groups. In the process, Du became the leading codifier of the Chongxuan 重玄 (Twofold Mystery) hermeneutical school. Drawing inspiration from the Buddhist Mādhyamika or Sanlun 三論 (Three Treatises) school, Twofold Mystery emphasized the realization of an ontological condition where neither being nor non-being exists. This is the state of "oneness," and Twofold Mystery adherents such as Du Guangting equated this with realization of the

Dao. This is evident in the name "Twofold Mystery," which is a reference to chapter one of the *Daode jing*: "Mysterious and again more mysterious——/The gateway to all that is wondrous" *(xuan zhi you xuan zhongmiao zhi men* 玄之又玄眾妙之門). Du's commentary is found in his *Daode zhenjing guangsheng yi* 道德患真經廣聖義 (Expansive and Sagely Meaning of the Perfect Scripture on the Dao and Inner Power; DZ 725).

With the fall of the Tang dynasty, China eventually came to be divided into three distinct states: the Khitan state of Liao (907-1125) in the northeast, the Tangut state of Xixia (990-1227) in the northwest, and the Chinese state of Song (Northern: 960-1126; Southern: 1127-1279) in the middle and south. Under the Northern Song, Daoism continued to receive imperial support. The Song emperors in general viewed their mandate as a reflection of a larger Daoist dispensation, with legitimacy partly based on Daoist revelations at Louguan. The ideal of Great Peace (*taiping* 太平) also formed the basis of Emperor Taizong's 太宗 (r. 976-997) consolidation of the empire. A number of Northern Song emperors also initiated and supported the compilation of Daoist textual collections. Moreover, Emperor Huizong 徽宗(r. 1100-1126) recognized two Daoist sacred sites in southern China: Maoshan 茅山, associated with Highest Clarity, and Longhu shan 龍虎山 (Dragon-Tiger Mountain), associated with the Celestial Masters, now known as Zhengyi 正一 (Orthodox Unity).

It was also during the Song dynasty that the Chan 禪 (Zen) tradition, a Buddhist monastic tradition, reached national prominence. Chan was a monastic and meditation movement focusing on realization of one's inherent Buddha nature (Skt.: *tathāgata-garba).* In terms of

Daoist history, the Chan Buddhist tradition deserves special attention. Traditionally speaking, this tradition focuses on a lineage of "patriarchs," beginning with Bodhidharma,[44] a legendary Indian meditation master, and culminating in the well-known division between the so-called "Northern School" and "Southern School." While recent revisionist scholarship has challenged the historical accuracy of this division, including the "rhetoric of immediacy" and claims of "sudden enlightenment" of the Southern School, such "constructions" clearly had an impact on Daoism in the late medieval period. For our purposes, it is important to note that Chan became a nationwide monastic tradition during the Song dynasty; this emphasis on monasticism and intensive meditation would have a major influence on later Daoist traditions. However, it should also be mentioned that scholars, especially Buddhologists, too frequently characterize later forms of Daoist monasticism as inferior forms of Buddhism. This fails to appreciate the complex cross-pollination that occurred between these traditions. It is clear that Chan Buddhism is indebted to the Daoist tradition, especially the *Zhuangzi* and earlier precedents for the "recorded sayings" (*yulu* 語錄) genre of literature that became popularized through Chan. Moreover, although "anthropological evidence" has yet to be developed, it is clear that Daoists and Buddhists cohabitated and commingled at various sacred mountains such as Tiantai 天台 and Zhongnan 終南.

Towards the end of the Tang and beginning of the Song, traditions of internal alchemy (*neidan* 內丹) became systematized. The roots of

[44] The mythical lineage of Chan begins when Śākyamuni held up a single flower to an assembly and his disciple Kāśyapa smiled. Here began the mind-to-mind transmission (*yixin chuanxin* 以心傳心).

these movements can be found in a number of earlier Daoist movements such as "inner observation" (*neiguan* 內觀) meditation practices, longevity techniques (*yangsheng* 養生), laboratory alchemy (*waidan* 外丹), and *Yijing* 易經 (Classic of Change) symbolism.[45] Internal alchemy, alternatively referred to as the "Golden Elixir" (*jindan* 金丹), uses a highly symbolic language to describe a process of spiritual refinement, a shift in ontological condition from ordinary human being to a more cosmological being. The goal was the attainment of "immortality" or "transcendence" (*xian* 仙) as a form of ecstatic otherworldly existence through a series of energetic mutations of the body, which would transform it into a spiritual entity known as the "immortal embryo" (*xiantai* 仙胎). Generally, internal alchemy traditions emphasize the so-called Three Treasures (*sanbao* 三寶), namely, vital essence (*jing* 精), subtle breath (*qi* 氣), and spirit (*shen* 神). These psycho-physical "substances" are utilized in a three-stage process of self-transformation: (1) Refining vital essence to become qi (*lianjing huaqi* 煉精化氣); (2) Refining qi to become spirit (*lianqi huashen* 煉氣化神); and (3) Refining spirit to return to Emptiness (*lianshen huanxu* 煉神還虛).

The earliest known tradition of internal alchemy is referred to as the "Zhong-Lu 鐘呂 tradition." This is a textual tradition associated with Zhongli Quan 鐘離權 (Zhengyang 正陽 [Upright Yang]; 2nd c. C.E.?) and Lu Dongbin 呂洞賓 (Chunyang 純陽 [Pure Yang]; b. 798?), with the latter eventually becoming the patriarch of internal alchemy traditions in general. The related texts center on dialogues between

[45] Livia Kohn (1989) has provided a discussion of the practice of *neiguan.* Isabelle Robinet (1989) has examined some of the influences on the development of internal alchemy.

these two immortals; two representative works are the *Chuandao ji* 傳道集 (Anthology of the Transmission of the Dao; DZ 1309) and *Baiwen pian* 百問篇 (Chapters of One Hundred Questions; DZ 1017, j. 5).

The Zhong-Lu textual tradition provided much of the foundations for later, more anthropologically real movements. Conventionally speaking, a distinction, which follows Chan Buddhism, is made between the so-called Beizong 北宗(Northern Lineage) and Nanzong 南宗(Southern Lineage). The Northern Lineage refers to the Quanzhen 全真 (Complete Perfection) movement, founded by Wang Zhe 王嚞（Chongyang 重陽 [Redoubled Yang]; 1113-1170), while the Southern Lineage refers to a textual tradition (but this time with historically identifiable persons) that revolves around "five patriarchs." These include Liu Cao 劉操 (Liu Haichan 劉海蟾; fl. 1031); Zhang Boduan 張伯端 (d. 1082), author of the seminal *Wuzhen pian* 悟真篇 (Chapters on Awakening to Perfection; DZ 1017, j. 26-30); Shi Tai 石泰 (d. 1158); Xue Shi 薛式 (d. 1191); and Chen Nan 陳楠（d. 1213). The well-known Bai Yuchan 白玉蟾 (1194-ca. 1227) was a disciple of Chen Nan. Both of these internal alchemy lineages owe a great deal to the slightly earlier textual tradition known as the "Zhong-Lii tradition."

Although traditional Chinese historiography and Western Sinological history tends to exclude "non-Chinese" states from "Chinese history," Daoist history in general and the late medieval period in particular cannot be understood without such inclusion. The Khitan-Liao was eventually conquered by the Jurchens, a semi-nomadic people from an area in the far northeast (previously called Manchuria) and

ancestors of the later Manchus. The Jurchens established the Jin dynasty (1115-1234) and in the process conquered the Northern Song, forcing the court elite to flee south and establish the Southern Song dynasty (1127-1279). It was under the Jurchen-Jin dynasty that one of the most important sub-traditions in Daoist history emerged. This was the Quanzhen 全真 (Complete Perfection) movement, which is the only Daoist monastic tradition to survive into the modern world especially in the modified branch known as Longmen 龍門(Dragon Gate).[46] Complete Perfection was founded by Wang Zhe 王嚞 (Chongyang 重陽 [Redoubled Yang]; 1113-1170), a solitary ascetic and mystic who after years of intense seclusion began accepting disciples. The most well-known of these disciples are the so-called Seven Perfected (*qizhen* 七真): (1) Ma Yu 馬妊 (Danyang 丹陽 [Elixir Yang]; 1123-1183); (2) Tan Chuduan 譚處端 (Changzhen 長真 [Perpetual Perfection]; 1123-1185); (3) Qiu Chuji 丘處機 (Changchun 長春[Perpetual Spring]; 1148-1227); (4) Liu Chuxuan 劉處玄(Changsheng 長生 [Perpetual Life]; 1147-1203); (5) Wang Chuyi 王處一 (Yuyang 玉陽 [Jade Yang]; 1142-1217); (6) Hao Datong 郝大通 (Taigu 太古 [Great Antiquity]; 1140-1212); and (7) Sun Buer 孫不二 (1119-1182), a woman who became centrally important in later female alchemical traditions.[47] Over time,

[46] In both the early Complete Perfection movement and its later Dragon Gate branch, certain texts were centrally important. Two of the most important are the sixth-century C.E. *Yinfu jing* 陰符經 (Scripture on the Hidden Talisman; DZ 31) and eighth-century C.E. *Qingjing jing* 清靜經 (Scripture on Clarity and Stillness; DZ 620).

[47] Each of these seven early practitioners receives a place of veneration in contemporary Complete Perfection Daoism, as expressed in the *Xuanmen risong zaowan gongke jing* 玄門日誦早晚功課經 (Liturgical Scriptures of the Mysterious Gate for Daily Morning and Evening Recitation; ZW 936; ZW 937), the primary

Quanzhen attracted more and more followers and eventually established "associations" or "meeting halls" (*hui* 會/*she* 社/*tang* 堂), sometimes rendered as "congregations," throughout northern China. In the year 1222, Qiu Chuji met Chinggis Qan (Genghis Khan; ca. 1162-1227; r. 1206-1227) and received *de facto* control of the whole of north China's organized religious communities. An account of Qiu's travels may be found in the well-known *Xiyou ji* 西遊記 (Record of Western Travels; DZ 1429). This period was followed by Quanzhen's rise in status and membership to become a fully established and widely-disseminated form of monastic Daoism. This privileged status was short-lived and a number of anti-Daoist edicts were issued under Qubilai Qan (Khubilai Khan; Emperor Shizu 世祖; 1215-1294; r. 1260-1294), a warlord of the Mongol Yuan dynasty, which was the first non-Chinese dynasty to control the whole of China. The anti-Daoist edicts culminated in the burning and destruction of Daoist texts, textual collections, and printing blocks in 1281. The *Chongyang lijiao shiwu lun* 重陽立教十五論 (Redoubled Yang's Fifteen Discourses to Establish the Teachings; DZ 1233) is frequently held up as a representative text concerning early Complete Perfection beliefs and practices.

The Song and Yuan dynasties also saw the emergence of more popular forms of religiosity. In particular, deity cults and new ritual lineages became established. As noted, Lü Dongbin received much veneration and devotion, with different patrons and believers characterizing him differently depending on their socio-economic

liturgical text of the contemporary monastic order. In that text, each of the Seven Perfected is associated with a specific lineage (e.g., Qiu Chuji with Longmen) and has a corresponding lineage poem.

position. In terms of ritual lineages, five in particular are currently known: (1) Qingwei 清微 (Pure Tenuity); (2) Tianxin 天心 (Celestial Heart); (3) Shenxiao 神霄 (Divine Empyrean); (4) Tongchu 童初 (Youthful Incipience); and (5) Jingming 淨明 (Pure Brightness), also known as Zhongxiao dao 忠孝道 (Way of Loyalty and Filiality). Generally speaking, these lineages emphasized ethical rectification and ritual intervention as efficacious for communal well-being. They tended to concentrate on securing good fortune and healing disease (including exorcism). It was also in the context of such ritual lineages that "thunder magic" (*leifa* 雷法) developed. This type of atmospheric magic involved harnessing and channeling the power of thunder and lightning for self-transformation and healing. There was also a new celestial Department of Thunder (Leibu 雷部), to which petitions and memorials were submitted by the ritual master (*fashi* 法師).

The Mongol Yuan dynasty was eventually conquered by a native Chinese nationalist rebellion, which resulted in the founding of the Ming dynasty (1368-1644). This brings us to the "late imperial period" of Daoist history. Unfortunately, research on Daoism in the periods following the late medieval period is just beginning. Thus, this section and those which follow must be understood as fragmentary, preliminary, and provisional. The cultural trend of "syncretism," fully established as normative during the late medieval period, continued during the late imperial period. Syncretism, an approximation of the Chinese *sanjiao heyi* 三教合一("the three teachings made one"), refers to the tendency of distinct religious traditions adopting and adapting aspects from other distinct traditions. In the case of Daoism, this meant borrowing and transforming various

beliefs and practices from Buddhism and Confucianism in particular. A good example of the syncretistic tendency is Lin Zhaoen 林兆恩 (1517-1598), a Confucian scholar who had affinities with both Chan Buddhist theories of mind and meditation practice as well as Daoist internal alchemy. Lin Zhaoen simplified internal alchemy, in some sense psychologizing it and emphasizing "nine stages of mind-cultivation." He eventually founded a school that focused on healing and public relief efforts.

Two characteristics of the late imperial period in turn deserve note: simplification and popularization. For example, during this historical phase, internal alchemy became simplified, with much of its esoteric language either systematically defined or discarded. Similarly, Daoist beliefs and practices became mingled with and appropriated by folk religious traditions. In terms of the Daoist tradition itself, popularization involved a greater attention to the needs and activities of the common people. Thus, a number of local and popular deities became incorporated into the Daoist pantheon. In addition, new and powerful gods entered the scene. Some of these included Xuanwu 玄武 (Mysterious Warrior), also known as Zhenwu 真武 (Perfect Warrior), Wenchang 文昌 (God of Literature), Tianfei 天妃 (Celestial Consort), also known as Mazu 媽祖 (Mother Ancestor), Bixia yuanjun 碧霞元君 (Primordial Goddess of Morning Mists), and Doumu 斗母 (Dipper Mother).[48] Also deserving emphasis is the fact

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Eventually, many of these goddesses became commingled, so much so that they are frequently seen as synonymous. In addition, these various female deities are often equated with Guanyin 觀音(Hearer-of-Cries; Avalokiteśvara), Xiwangmu 西王母 (Queen Mother of the West), and Yaochi jinmu 瑤池金母 (Golden Mother of the Turquoise Pond).

that the Daoist mountain Wudang shan 武當山 (Wu Tang) achieved national prominence during the Ming. This was partially a result of its association with the efficacious god Zhenwu. Wudang shan was later mythologized as the residence of Zhang Sanfeng 張三丰(14th c.?), a pseudo-historical figure, and associated with the development of "internal style" (*neija* 內家) martial arts such as Taiji quan 太極拳 (Tai Chi). In fact, historical research suggests that Taiji quan was created in Chen 陳 village probably in the sixteenth or seventeenth century.[49] The increased popularization of Daoism is also evident in the expanded practice of "spirit-writing" as well as in the production of "precious scroll" (*baojuan* 寶卷) literature and morality books (*shanshu* 善書). With regard to spirit-writing, it is interesting to note that many contemporary cults in southern China, Hong Kong, and Taiwan channel Lü Dongbin during séances and identify themselves as Complete Perfection lineages.

Other significant developments also occurred during the Ming dynasty. Of particular note is the imperial sponsorship of the *Zhengtong daozang* 正統道藏 (Daoist Canon of the Zhengtong Reign), the earliest surviving Daoist textual collection and the basis for the development of modern Daoist Studies. Containing some 1400 texts, this "canon" was overseen by Orthodox Unity priests and was completed in the early 1440s.

The final imperial dynasty was the Manchu Qing (1644-1911), a time of non-Chinese rulers who were the descendents of the Jurchens. The

[49] Later, it is not clear when, Daoists at Wudang shan did adopt and develop internal martial art forms, culminating in such techniques as the well-known and popularized Wudang Taiji quan.

Qing dynasty saw the Longmen 龍門 (Dragon Gate) lineage of Complete Perfection rise to national prominence. Although traditionally associated with Qiu Chuji of early Complete Perfection, recent research suggests that the established lineage of Dragon Gate goes back to Wang Changyue 王常月 (Kunyang 崑陽; 1622-1680), abbot of Baiyun guan in the mid-1600s. In the Qing, a variety of energetic and charismatic leaders helped secure recognition for Dragon Gate. These included such figures as Min Yide 閔一得 (Lanyun 懶雲 [Lazy Cloud]; 1758-1836), an eleventh-generation (according to Dragon Gate lineage formulation) lineage holder and compiler of major textual collections, and Liu Yiming 劉一明 (Wuyuan 悟元[Awakening to the Origin]; 1734-1821), another eleventh-generation lineage holder and author of the *Daoshu shier zhong* 道書十二禾重 (Twelve Daoist Books). The *Daoshu shier zhong* has become highly influential in the West through Thomas Cleary's (b. 1949) various translations of texts contained therein.[50] As mentioned the Complete Perfection tradition and the Orthodox Unity tradition, most likely established on Mount Longhu in the eleventh century, are the only two distinct traditional Daoist movements in name that survive into the modern and contemporary periods.

The late-imperial trends of simplification and popularization are also evident in the increase of internal alchemy literature during the Qing. Such texts include the *Jinhua zongzhi* 金華宗旨 (Secret of the

[50] Trained in East Asian Languages and Civilizations at Harvard University, Thomas Cleary is one of the most prolific translators of East Asian religious literature. Cleary's translations are often philologically accurate, yet they too often simplify the text in question and fail to supply the required historical contextualization. Cleary's various publications have been highly influential on popular Western Taoism.

Golden Flower; ZW 334), *Xingming fajue mingzhi* 性命法訣明指 (Illuminating Pointers to the Methods and Instructions of Innate Nature and Life-destiny; ZW 872) by Zhao Bichen 趙璧塵 (b. 1860), and the *Huiming jing* 慧命經 (Scripture on Wisdom and Life-Destiny). The latter is associated with a new internal alchemy lineage that emerged during the Qing. This was the Wu-Liu 悟刘 lineage. It centers around two historical figures: Wu Shouyang 伍守陽 (1563-1644), a Ming-dynasty Daoist master, and Liu Huayang 劉華陽(fl. 1736), a Chan Buddhist monk. This school draws on internal alchemy traditions of the Song and Yuan, combining them with aspects from Chan and Huayan Buddhism.

It was also during the late imperial period that the first Western missionaries arrived in China, bringing with them a whole set of new cultural influences, sensibilities, and prejudices. One of the most well-known early missionaries was Matteo Ricci (1551-1610), a representative of the Roman Catholic Jesuit order[51] who was based in Macao in the 1580s. It seems that Ricci was received favorably at the Ming court partially because of his knowledge of astronomical occurrences, which the Ming rulers, like Chinese imperial courts in general, saw as important signs concerning the Mandate of Heaven (*tianming* 天命). In this process of cultural exchange and cross-pollination, Matteo Ricci became somewhat sinified, wearing Confucian robes and gaining a profound respect for the Confucian

[51] The Jesuits were and are known especially for their erudition and openness to learning. In addition, their basis in Roman Catholicism makes them more sympathetic to ritualistic expression and institutional hierarchies.

tradition.[52] Such mingling with "inferior races," "primitive cultures," and "idolatrous religions" did not go unnoticed by other Christian missionaries and church authorities. The Jesuit policy of accommodation and assimilation was opposed by rival orders, particularly by the Dominicans. The controversy that would eventually bring an end to missionary activity in China revolved around the proper attitude that a Christian should adopt towards Confucianism, including its doctrines and practices. This is often referred to as the "rites controversy," as it partially revolved around whether or not Confucian rites were religious. The Jesuits claimed that the ceremonies were non-religious and thus permissible, while the Dominicans held the opposite position. Eventually, the papacy intervened and ruled against the Jesuits. In 1704, the Pope condemned Chinese rituals, and in 1742 a decree was issued that settled all points against the Jesuits. This remained the position of the Catholic Church until 1939. However, emperors such as Shengzu 聖祖 (Kangxi 康熙; r. 1662-1722) and Gaozong 高宗 (Qianlong 乾隆; r. 1736-1795) promoted the Jesuit position. This led to the proscription of Christianity in 1724.

It was not until 1846 at French insistence that the proscription was lifted. The period between 1860 to 1900 saw the gradual spread of missionary stations into every province. One of the central figures in this missionary activity and in the Western "invention" of Daoism was James Legge (1815-1897), a Scottish Congregationalist and representative of the London Missionary Society in Malacca and

[52] The Jesuit encounter with the Confucian classics, and their subsequent transmission to Europe, has led some to hold that European Enlightenment values were at least partially the result of Chinese cultural influence.

Hong Kong (1840-1873). Legge was one of the first Westerners to translate Daoist texts beyond the *Daode jing* and *Zhuangzi.* His translations became highly popular, to the point of becoming canonical (they are still in print through Dover). They were published in Max Muller's *Sacred Books of the East,* published in 50 volumes between 1879 and 1891. Legge's *Texts of Taoism* made up volumes 39 and 40. Legge, like his Victorian and Christian missionary counterparts, viewed and disseminated the *Daode jing* as the "Daoist bible" and Laozi as the "founder" of Daoism. This also involved the distinction between a so-called "philosophical Daoism" and "religious Daoism," with the former being "pure" and "original" Daoism and latter being a degenerate and superstitious adjunct to the former. There can be little doubt that the "Victorian invention of Daoism," the "Leggian view" of the Daoist tradition, established many of the dominant interpretative lenses for the West's interaction with the tradition. That is, Legge's portrayal of Daoism, influenced by Confucian literati officials, is the "received view" of Daoism, the most widespread construction of Daoism in the West. One might even go so far as to call it the "Sinological prejudice" concerning Daoism, because of the widespread influence of Confucian literati, Victorian translators, and their intellectual progeny.

The end of the Qing dynasty was an extremely turbulent time, filled with violence, socio-political upheaval, and radical cultural transformation. This was the result of the imperialist ambitions of major European colonial powers and Japanese attempts to control the region. The interest of the dominant European colonial powers in China was principally due to tea, porcelain, and textiles, especially silk. The end of the late imperial period saw the vying for

geographical control, which culminated in the Opium Wars (1839-1842; 1856-1860). Following this war, there were Germans in Shandong, French and British in Shanghai, British in Guangdong and Hong Kong, Portuguese in Macao, and a number of other smaller protectorates along the coast. It is no coincidence that the origins of modern Daoist Studies began in two of the principal imperialistic countries from this period, namely, France and Japan. The presence of European forces and missionaries and the related oppression led to two native Chinese millenarian rebellions. Between 1850 and 1864, Hong Xiuquan;洪秀全 (1814-1864) began to gather followers and initiate the (second, modern) Taiping 太平 (Great Peace) Rebellion. Under the influence of Christian missionization, Hong saw himself as "God's Chinese son" and Jesus' younger brother, partially due to the fact that the early Chinese transliteration of Jehovah contained the same characters as Hong's name. That is, Hong Xiuquan was somehow miraculously related to the divine hierarchy of Christianity. Drawing also on traditional Chinese millenarianism, with its emphasis on a future era of "Great Peace" established by a visionary leader named Li Hong 李洪, Hong gathered a massive army to fight imperial powers.[53] This mass following was partially the result of the

[53] Note that the leader of the contemporary ethical Qigong 氣功 movement Falun gong 法輪功 (Exercises of the Dharma Wheel) is named Li Hongzhi 李洪志 (b. 1952). This popularized Buddhist Qigong movement has become known in the West because of its evangelistic approach and its recent suppression (1999-present) by the Chinese government. While many of its members are innocent health practitioners or simply socially engineered cult members that deserve sympathy, the dominant Western activism against such political suppression fails to understand the complexity of the situation. Li Hongzhi and his followers of course claim that Falun gong is only a health and ethical system. But deeper research reveals Li Hongzhi (note the appearance of the same characters 李洪) as a megalomaniac who believes himself to be the next Li Hong (world savior): "At the moment, I am the only person

Taiping's vision of the world as inhabited by demons (Manchus and Europeans) that needed to be exorcised.[54] Wherever the Taiping armies passed, they destroyed not only Manchu installations, but also Daoist and Buddhist temples. By the time that the rebellion was finally defeated in 1864, over thirty million Chinese people had died in a population of 400 million. It is both ironic and tragic that a movement known as "great peace" would cause the death of almost ten percent of the Chinese population. This was followed by a much smaller rebellion called Yihe quan 義和拳 (Righteous and Harmonious Boxers), known in Western literature as the Boxer Rebellion, which took place in 1900. The members of this uprising were martial artists who believed that they had achieved such high levels of attainment that they were impervious to bullets. Needless to say, this rebellion also failed. So began a movement toward complete socio-political and cultural transformation that led to the diminishment of traditional Chinese culture and the beginning of modernization. In such a historical context and the related Chinese

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who is genuinely teaching Qigong towards higher levels at home [in China] and abroad" (Li 1998a, 1). And "Buddha Law (佛法) is the most profound, and the most mystic and supernatural science of all theories in the world....During my lecturing session, *I'll* first purify your bodies to prepare you for the advanced level cultivation. Afterward *I'll* plant Falun (法輪) and Qiji (氣機 energy mechanism) in and around your bodies before teaching you how to practice these exercises. At the same time, *I'll* have my Law bodies (法身) to protect you" (Li 1998b, 1, emphasis added). In the larger context of the Chinese history of millenarian rebellions, it should be no surprise that the Chinese government would be uneasy about such a messianic and millenarian leader who can mobilize tens of thousands of believers at will.

[54] Here we see a core Chinese perspective, that of inside (*nei* 內) and outside (*wai* 外). In this way of perceiving, what is beneficial is inside, while what is detrimental is outside. In some sense, Chinese history and culture may be understood, at least partially, as an attempt to keep the outside (foreign/non-Chinese) outside or make the outside inside.

concern for base survival, how could Daoists and the Daoist tradition not suffer?

With the fall of the Qing to the Chinese nationalists in 1911 and the subsequent establishment of the Republic of China in 1912, China ceased to be an "imperial" state ruled by a given emperor and his court (including its patterns of imperial patronage).[55] The "last emperor of China" was Pu Yi 溥儀 (Xuantong 宣統；r. 1909-1911). This marks the beginning of the "modern period" in the periodization model employed here. The Republic of China (1912-1949; in Taiwan, 1949-) was the first modern and "secular" Chinese government, established by the physician and committed democrat Sun Yat-sen 孫逸仙 (Sun Yixian; 1866-1925). There can be little doubt that this change produced many benefits relating to issues of democratization, social justice, and a more egalitarian approach towards humanity. However, it also led to a de-emphasis on traditional Chinese culture and a view of religion as "feudal superstition." That is, Daoists were, by definition, deluded and engaged in an older (=antiquated) way of life. European cultural influences and modernization shifted the dominant worldview: the cult of antiquity (older=more authentic), with its "logic of precedence," was replaced by the cult of newness (newer=more beneficial), with its "logic of subsequence." The latter is clearly rooted in apocalyptic and Utopian forms of perception.

[55] The effects of the end of imperial patronage on Chinese religious traditions has yet to be adequately considered.

During the modern period, the social unrest of the previous period continued, and various local warlords maintained control of their given regions, as imperial powers continued their profiteering. After Russia became communist in 1917, it sent emissaries to China which influenced the founding of the Chinese Communist Party. Meanwhile, the Japanese had their own imperial ambitions, occupying Korea and Manchuria, and launching a major invasion of China in 1937. After the Japanese captured Beijing, Tianjin, and Shanghai, they set their sights on Nanjing (the home of early Shangqing Daoism). Nanjing fell in December of 1937, resulting in the infamous "rape of Nanjing" during which Japanese troops raped and pillaged. After seven weeks, it was all over and at least 42,000 people were dead. These developments involved the country in World War II, which ended in East Asia with the United States of America dropping atomic bombs on Hiroshima and Nagasaki in August of 1945. This resulted in yet another civil war in China, in which the Communists (Chinese Communist Party) under Mao Zedong 毛澤東（1893-1976) fought the Republicans (Guomindang [Kuo-min-tang] 國民黨）under Chiang Kai-shek 蔣介石 (Jiang Jieshi; 1887-1975).[56] The war ended in 1949 with the flight of the Republications to Taiwan and the establishment of the People's Republic of China (PRC; 1949-). It was also the Communists, under the leadership of Mao Zedong, who invaded Tibet in 1950. This invasion, including the rape, murder, and ethnic cleansing of the indigenous Tibetan peoples by the invading Chinese forces, led to a state of complete social disruption. Some estimates suggest that over 1.5 million Tibetans have died under Chinese rule.

[56] In this section and the one's which follow, I use the romanization system employed by the individual or group in question.

In addition, Chinese occupation and oppression caused the flight of the 14th Dalai Lama (Tendzin Gyatso; b. 1935) and some 70,000 refugees to India and Nepal in 1959.[57] The current Tibetan government-in-exile has established its headquarters and a major Gelugpa monastic university in Dharamsala in northern India. Such historical occurrences and patterns of interaction are necessary for a more complete understanding of the larger dynamics of global contact, cultural exchange, as well as adaptation, assimilation, and appropriation.

In terms of the overall religious context and Daoism in particular, the modern period was a time of dramatic change. Monastic life was attacked as a form of escape from a country in need of workers and soldiers, while religious worldviews and lifeways were condemned as superstitious and wasteful. Such critiques were partially rooted in Marxian and Stalinist political ideologies, including the famous view that "religion is the opiate of the masses."[58] Although the Marxist leadership of the PRC did not believe in the validity of religion, they did include "freedom of religious belief" in their new constitution. However, "religion" was very different from "feudal superstition." Daoism fell into the latter, especially as it had no diplomatic significance. Traditional myths and stories were rejected, gods

[57] Since the invasion, the Chinese communist government and its collaborators have initiated a "resettlement" and "reoccupation" policy, wherein Chinese settlers receive money and (Tibetan) land as an incentive to move to Tibet. China is also using Tibet as a mine of "unlimited resources" and as a dumping ground for its nuclear waste products. Such is the fate of "Shangri-la" in a modern industrial context.

[58] Marx hardly could have anticipated the development of television and electronic media, with the subsequent disembodiment (evisceration, lobotomization, and anesthetization) of human being.

denounced, and organizations disbanded. Simultaneously, smaller scale and more regional forms of "religious" practice were more difficult to control; spirit-writing cults as well as longevity and martial arts societies flourished. The latter was also employed as a form of nationalistic up-building; the atrophied bodies of older Chinese imperial courts, perhaps most clearly represented by eunuch culture and the practice of foot-binding, would become replaced by a nation of soldiers with high-level martial arts prowess. Such changes manifested in two important ways for the Daoist tradition. First, Daoism was effectively banned in mainland China as feudal superstition, with its monks sent out to work, marry, or be "reeducated," its monasteries destroyed, closed, or used for military installations, and its priests forbidden to conduct rituals. Second, such persecution and suppression initiated an exodus from the "Central Kingdom" (Zhongguo 中國). More and more Daoists fled to other East Asian countries such as Hong Kong, Korea, Malaysia, Singapore, and Taiwan. Simultaneously, Chinese Daoists began a slow emigration to European and North American countries. That is, the Chinese communist revolution had the unintended consequence of disseminating Chinese religious culture throughout the world and helping to make Daoism a "world religion."

More specifically speaking, we have seen that the two main forms of Daoism that survived into the modern period are the Quanzhen 全真 (Complete Perfection) movement, specifically its Longmen branch, and the reconstituted Zhengyi 正一 lineage of the early Celestial Masters movement. In the years of the Republic, Daoists attempted to establish Daoist organizations. In 1912, a Central Association of Daoism was founded, but it was principally a local (Beijing) and

sectarian (Longmen) organization. During the same year, Zhengyi Daoists created their own General Daoist Assembly of the Republic of China. Then, in 1932, another group came to the fore: the Chinese Daoist Association (Zhongguo daojiao xiehui 中國道教協會). After World War II, Daoists in Shanghai planned the revival of Daoism. In 1947, they set up the Shanghai Municipal Daoist Association, with Zhang Enpu 張恩浦 (1904-1969),[59] the 63rd Celestial Master, and Chen Yingming 陳攖寧（1880-1969) as leaders. After the establishment of the PRC, Zhang Enpu fled to Taiwan and established Taiwan as the *de facto* headquarters of the Zhengyi tradition, although Longhu shan would later return to prominence. It was also during the early years of the PRC (1957) that the national Daoist Association was founded. In 1961, they defined their objectives as follows: to study the history of Daoism, publish journals, and set up training programs for young candidates. However, the so-called "Cultural Revolution" (1966-1977), also referred to as the "Ten Years of Chaos," with its socially engineered and fanatical youth brigade known as the Red Guards, stopped all efforts. All religious organizations suffered immensely, with monasteries and temples destroyed or closed and Daoist monks and priests forced into dominant ideological patterns. The degree of destruction is still evident in contemporary temples. Only since 1978 has there been a comeback. This began with the death of Mao Zedong and the new leadership of Deng Xiaoping 鄧小平（19(M-1997), who initiated the Four Modernizations, opened the country economically and

[59] Zhang Enpu (Chang En-p'u) took over the position of Celestial Master from Zhang Yuanxu 張元旭 (62nd Celestial Master, ?-1924) in 1924. The Celestial Masters lineage passed from Zhang Enpu to Zhang Yuanxian 張源先（64th Celestial Master) and then to Zhang Jiyu 張繼禹（65th Celestial Master), the current lineage holder.

politically, and paved the way for massive development. Since 1980, religious organizations and practices, as well as the academic study of religion, have undergone a revival. Religious associations have reopened, such as the Chinese Daoist Association based at Baiyun guan 白雲觀 (White Cloud Monastery; Beijing). By 1986, twenty-one key monasteries were returned to the Daoists, and since 1990 training programs for new candidates have been initiated in Beijing, Shanghai, and Chengdu.

For the purposes of this account, I would date the "contemporary period" of Daoist history to 1978, when the PRC relaxed its restrictions on Daoist participation and organization, when Daoist Studies began to become fully established, and when the Daoist tradition began to be more formally adapted and transmitted to a global context. Three developments, then, must be presented: (1) the condition of Daoism in contemporary China;[60] (2) the history of Daoist Studies as a viable academic discipline; and (3) the emergence of Daoist movements in European and North American countries.

As mentioned, Daoism in contemporary mainland China, Hong Kong, and Taiwan consists primarily of Zhengyi 正一 (Orthodox Unity) and Quanzhen 全真(Complete Perfection) traditions. The latter is most prominent in its Longmen 龍門 (Dragon Gate) branch. The former is mainly community-based, family lineages. Orthodox Unity priests are householders, usually married with children, who perform rites for community welfare on calendrically important days and/or when

[60] I will not address Daoist influences on individuals and organizations in other East Asian countries. Interested readers may consult the *Daoism Handbook* (Kohn 2000a).

employed by community members. They live and work in a given village or city. The Orthodox Unity tradition mainly flourishes in south and southeastern mainland China and Taiwan. The most important sacred sites for Orthodox Unity priests are various local temples in Taiwan and Longhu shan 龍虎山 (Dragon-Tiger Mountain; Jiangxi). Complete Perfection Daoists are monastics, celibate and formally initiated monks and nuns. Traditionally speaking, members of the various Complete Perfection lineages live in monasteries, established throughout China's major urban centers and sacred mountains. While Complete Perfection temples engage in ritual practice, the emphasis is more contemplative. Practicing Complete Perfection adepts often engage in scripture study and recitation, meditation (including internal alchemy), and longevity practices. Under the influence of Buddhism, Complete Perfection monks and nuns also tend to be vegetarian, a practice that is at odds with Chinese dietetics based in Traditional Chinese Medicine. Some important sacred sites for Complete Perfection adepts are Baiyun guan 白雲觀 (White Cloud Monastery; Beijing), Baxian gong 八仙宮 (Eight Immortals Palace; Xi'an), Huashan 華山（Shaanxi）, Qingyang gong 青羊宮 (Azure Ram Palace; Chengdu), and Qingcheng shan 青城山 (Azure Wall Mountain; Sichuan).[61] Based on my field observations at these temples and monasteries (1997-1998; 2005-2006）, a number of important details deserve mention. Traditional Complete Perfection temples are sited according to Fengshui 風水 (lit., “wind and water;” Chinese geomancy) on a north-south axis (sometimes actually so,

[61] A descriptive list of Daoist sacred sites may be found in Brock Silvers' *The Taoist Manual.*

other times ritually so).[62] The central altar is most often occupied by the Sanqing 三清 (Three Purities/Three Pure Ones), namely, Yuanshi tianzun 元始天尊 (Celestial Worthy of Original Beginnings; center position), Lingbao tianzun 靈寶天尊 (Celestial Worthy of Numinous Treasure; left-hand side of Yuanshi tianzun), and Daode tianzun 道德天尊 (Celestial Worthy of the Dao and Inner Power; right-hand side of Yuanshi tianzun). These "deities" represent the three primordial energies of the cosmos, which came into being when the Dao began a process of differentiation. Complete Perfection adepts most often practice solitary meditation and group recitation, with the recitation focusing on "spirit invocations" (*shenzhou* 神咒). Such chanting traditionally is performed during the new and full moon and the Eight Nodes (*bajie* 八節), with the latter being the beginning of the four seasons and the solstices and equinoxes. The Complete Perfection tradition mainly flourishes in northern and western mainland China. The Dragon Gate branch, at least in name, has spread to not only Hong Kong and Taiwan, but also Canada, England, Italy, and the United States.[63]

Daoist Studies, or the serious academic consideration of the entire breadth of the Daoist tradition, is a relatively recent occurrence. This is partially due to the fact that the scriptures of Daoism were largely inaccessible, seemingly non-existent, before the early part of the

[62] While Daoists use Fengshui and are often high-level geomancers, Fengshui is not Daoist per se. It falls more broadly within what I would label "traditional Chinese culture" or a "traditional Chinese worldview."

[63] Information on modern and contemporary Daoist communities and teachers may be found in Goullart 1999 (1961); Blofeld 1973; Yoshioka 1979; Saso 1972; 1978; Tsui 1991; Schipper 1993 (1982); Porter 1993; Dean 1993; 2000; Siegler 2003; Komjathy 2004; 2006; Silvers 2005.

twentieth century. With the 1927 reproduction of the *Zhengtong daozang* 正统道藏 (Daoist Canon of the Zhengtong [Period]; hereafter Daoist Canon), a Ming dynasty (1368-1644) collection of over 1,400 texts, textual resources for in-depth inquires into the Daoist tradition became available. Before this time, and for many years after, the *Daode jing* and *Zhuangzi* received most of the scholarly attention. While the "rediscovery" of the Daoist Canon prepared the way for historical research on Daoism through textual studies, it was not until the publication of a reduced 60-volume edition in the 1970s that the academic study of Daoism began to flourish. It is no coincidence that the 1960s and 1970s witnessed a dramatic increase in research. The principal early scholars were French and Japanese. Here I concentrate on Daoist Studies in the West. One may say that the father of Daoist Studies in the West, and the academic study of Daoism as a religion, appreciated and worthy of concern, begins with the publication of Henri Maspero's (1883-1945) detailed inquiries into the Daoist Canon, published in article form from 1928-1950. These articles were posthumously collected by Paul Demiéville (1894-1979) and published as *Le taoime et les religions chinoises* (translated into English as *Taoism and Chinese Religion* [1981]). Maspero died in the death camps at Buchenwald in 1945. However, the seeds for the emerging field Daoist Studies were already beginning to germinate in Rolf Stein (1911-1999) and Maxime (Max) Kaltenmark (d.u.), students of Maspero and Marcel Granet (1884-1948). In 1951 and 1953, Stein and Kaltenmark returned from Asia, beginning their teaching careers at the Fifth Section "Sciences religieuses" of the Ecole Pratique des Hautes Etudes in Paris. Their weekly seminars began to produce a new generation of scholars devoted to the study of Taoism. While

Kaltenmark himself published mainly in article form, the importance of his teaching career and subsequent influence on the emerging field of Daoist Studies should not be underestimated—Without Max Kaltenmark, Henri Maspero's pioneering studies on Taoism might have remained books on the shelf. It was largely due to Kaltenmark's extraordinary talent as a teacher that an impressive number of young scholars came to be trained in the study of the Daoist Canon and related subjects of Chinese religion. Kaltenmark was the teacher and mentor for many of the third-generation Western scholars who would come to more thoroughly investigate and explain the Daoist tradition in the coming decades. Under Kaltenmark's direction, some of the senior and most important scholars of the field completed their dissertations: Kristofer Schipper (1965), Anna Seidel (1969), Catherine Despeux (1976), Isabelle Robinet (1977), Manfred Porket (1979), Michel Strickmann (1981), John Lagerwey (1981), and Farzeen Baldrian-Hussein (1984).

At the same time that Kaltenmark was carrying out his research and guiding the third-generation of Daoism scholars, the field of Daoist Studies was receiving new and important contributions from England and the United States. Associated with a variety of institutions in Cambridge, Joseph Needham (1900-1995) and his research associates published the first installment of *Science and Civilisation in China* in 1954. With new volumes continuing to be published (seven "volumes" so far, amounting to twenty-two different books), the sheer scope of Needham's project is mind-bending. Particularly important for Daoist Studies are volume two (historical overview of Daoism), volume five (on laboratory and internal alchemy), and a

variety of other volumes on such topics as astronomy and Chinese medicine.

In the United States, Edward Schafer (1913-1991) was exploring some of the more poetic and exotic aspects of the Chinese literary tradition as well as Daoism. Based at the University of California at Berkeley, Schafer had far-ranging and eclectic interests. He aspired first and foremost to be a philologist, but his detailed scholarship led to numerous inquiries into the Daoist tradition. Like Kaltenmark, Schafer was also responsible for training some of the foremost contemporary scholars on Daoism. Among those who either trained with him or completed their dissertations under him, there are the following: Donald Harper (1982)，Suzanne Cahill (1982), Judith Boltz (1985), Stephen Bokenkamp (1986), and Livia Kohn (formerly Livia Knaul).

Two other major figures, occupying a historical position somewhere between Schafer and his students, and contemporaneous with the third generation of French scholars, are Michael Saso and Nathan Sivin. Saso was one of the first Western scholars to approach Daoism from an anthropological point of view. During his fieldwork in Taiwan, Saso, like Kristofer Schipper, received ordination and was thus initiated into the Daoist tradition.[64] Each of these scholars offers

[64] Kristofer Schipper (b. 1934), a Dutch scholar and preeminent member of Daoist Studies, received Daoist ordination in 1968 by Zhang Enpu 張恩浦, the 63rd Celestial Master, in Tainan 台南, Taiwan. Michael Saso (b. 1930) received Daoist ordination in the 1970s by Zhuangchen Dengyun 莊陳登雲 (Chuang-ch'en Teng-yUn; 1911-1976) in Xinzhu 新竹, Taiwan. Both of these ordinations were in the Zhengyi 正一 (Orthodox Unity) tradition, the modern form of Tianshi 天師 (Celestial Masters) Daoism.

an emic (insider's) perspective on the daily lives, worldviews, and practices of modern Daoists in Taiwan through their own experiential understanding as participants in the tradition. On a different note, Nathan Sivin's research has addressed and continues to explore the alchemical, medical and "scientific" traditions of China, with frequent attention given to Daoism. In addition, Sivin has written one of the more frequently cited and still relevant discussions of the use and misuse of the term "Daoist": "On the Word 'Taoist' as a Source of Perplexity" (Sivin 1978).

The roots of Daoist Studies in the West had found stable ground with the dedication of Kaltenmark and Schafer and the enduring interest that they inspired in their students. A larger international exchange also began to take place. Three international conferences dedicated to exploring the Daoist tradition were organized. The first took place in Bellagio, Italy, in 1968, and the following scholars participated: de Bary, Doub, Eliade, Graham, Ho, Kaltenmark, Link, Mather, Miyuki, Needham, Saso, Schipper, Seidel, Sivin, Welch, and Wright. Some of the proceedings were published in *History of Religions* 9.3-4. The second conference commenced in Tateshina, Japan, in 1973, and was attended by Sakai, Miyakawa, Needham, Kaltenmark, Stein, Hon, Schipper, Seidel, Porkert, Dull, Mather, Sivin, Strickmann, and Welch. A portion of this conference's proceedings was published in *Facets of Taoism* (1979). Finally, the third international conference took place at Unterägeri, Switzerland, in 1979, and participants included Chen, Fukui, Homann, Baldrian-Hussein, Kandel, Kimata, Lagerwey, Levi, Lu, Miyakawa, Murakami, Robinet, Sakai, Sawaguchi, Schafer, Schipper, Sivin, Strickmann, Wang, Yoshioka, Zimmerman, and Zürcher. The papers from this conference were not

published as a collection. “It was largely—but not exclusively—due to their [these scholars'] effort that we today have a number of important indexes and concordances to the Daoist canon and certain specific texts” (Kohn 2000b’ xxviii).[65]

With this momentum, enormous advances in the understanding of Daoism have been made in the last twenty or so years. Daoism became distinguished from the various other religions of China, and serious research into Daoism became academically viable. The larger tradition, not just the “philosophical” classics, began to be presented as profound and worthy of respect. A large portion of the tradition has received preliminary attention, and new methodologies have been applied. Scholars have addressed and explored Daoism in terms of textual studies, Chinese history, anthropological fieldwork, social history, epigraphy, and comparative religion. Most importantly in my view, high-level translations of Daoist scriptures with appropriate exegesis have been and are currently being undertaken (see, for

[65] Other important recent conferences include the Conference on Daoist Identity (Bowdoin College; York, Maine; May 29-June 1, 1998; organized by Livia Kohn, Harold Roth, Yamada Toshiaki, and Tanaka Fumio), Conference on Taoism and Ecology (Harvard University Center for the Study of World Religions; Cambridge, Mass.; June 5-8, 1998; organized by Norman Girardot and Livia Kohn), Conference on Daoist Cultivation (Camp Sealth; Vashon Island, Wash.; May 9-13, 2001; organized by Louis Komjathy), Conference on Daoism and Tantra (Boston University; Boston, Mass.; April 19-21, 2002; organized by David Eckel and Livia Kohn), First International Conference on Daoism and the Contemporary World (Boston University; Boston, Mass.; June 5-7, 2003; organized by Livia Kohn and Liu Xun), Second International Conference on Daoism and the Contemporary World (Sichuan University; Chengdu, Sichuan; June 6-10, 2004; organized by Li Gang, Zhang Qin, Livia Kohn and Liu Xun), and Third International Conference on Daoism and the Contemporary World (Munich, Germany; May 25-28, 2006).

example, Kohn 1993; Bokenkamp 1997). The foundations of Daoist Studies in the West became stabilized by the establishment and maintenance of a journal dedicated exclusively to publishing articles on Daoism; this was *Taoist Resources* (1989-1997).

While it is deeply regrettable that Daoist Studies has lost the life and work of Anna Seidel (1938-1991), Michel Strickmann (1942-1994), Isabelle Robinet (1932-2000), and Julian Pas (1929-2000), the high standards and innovative patterns of their research continue to inspire their students and younger members of the field. The "French tradition" of Daoist Studies remains strong and continues to develop challenging new perspectives. In addition to the above-mentioned scholars, Franciscus Verellen, Vincent Goossaert, Christine Mollier, and Pierre Marsone have provided substantial contributions, and we may look forward to the results of their ongoing research. In the "British tradition," Timothy Barrett's studies have been the most noteworthy. In terms of Daoist Studies in the West, the "American tradition" has the largest and most diverse number of members currently at work. Besides Schafer's students, some prominent American scholars include Robert Campany (Indiana University), Edward Davis (University of Hawaii), Stephen Eskildsen (University of Tennessee), Norman Girardot (Lehigh University), Russell Kirkland (University of Georgia), Terry Kleeman (University of Colorado, Boulder), Stephen Little (Honolulu Academy of Arts), Peter Nickerson (Duke University), Michael Puett (Harvard University), and Harold Roth (Brown University). Scholars are also conducting important research in a number of other Western countries: Poul Andersen (Germany/America), Kenneth Dean (Canada), Ute Engelhardt (Germany), Monica Esposito (Italy/Japan), Barbara

Hendrischke (Australia), James Miller (Canada), Benjamin Penny (Australia), Fabrizio Pregadio (Italy/Germany/United States), Florian Reiter (Germany), and Eugeny Torchinov (Russia).[66] In conclusion, it should be mentioned that Daoist Studies also flourishes in Japan, Korea, and more recently in China.

The Daoist tradition, however, is not simply an intellectual artifact. There are now Daoist practitioners and organizations throughout the world: the Belgian Taoist Association, British Taoist Association, Brazilian Taoist Association, French Taoist Association, Hong Kong Taoist Association, Italian Taoist Association and Sun Do (Korea/United States), for example. Daoism is currently in the process of being adapted and transmitted to a global context. Here I concentrate on **Daoist teachers and organizations in the North** America that identify themselves as Daoist, some of which have identifiable connections with the larger Chinese Daoist tradition. Before beginning my brief discussion of Daoism in North America, some **background information on Chinese immigration to the United States** may be helpful. The most important dates and legislation are as follows: 1790, the Naturalization Act restricts citizenship to "free white persons;" 1849, after the discovery of gold the first ship of Chinese people arrives in California; circa 1853, the first Chinese temples (Tin Hou Temple and Kong Chow Temple) are

[66] The best overview of the field of Daoist Studies is Anna Seidel's "Chronicle of Taoist Studies in the West 1950-1990" (1989-90). This article has been supplemented by Verellen 1995. For additional historical overviews of Daoist Studies in the West see Barrett 1981; 1987; Kohn 2000b. Clarke's *The Tao of the West* (2000) is highly recommended for understanding the ways in which Daoism has been interpreted, presented, and constructed in the West.

built in San Francisco; by 1854, over 13,000 Chinese people, virtually all men, had come seeking riches in the gold mines; 1882, the Chinese Exclusion Act effectively bans Chinese immigration and naturalization; 1917, the United States Congress passes the Immigration Act, which halts emigration from a "barred zone" in Asia that included Chinese and South and Southeast Asia (but not Japan and the Philippines); 1924，the Asian Exclusion Act imposes a national origins quota system that severely restricts emigration from Asia, including Japan; 1943, the Chinese Exclusion Act of 1882 is repealed, and Chinese people are granted naturalization rights (however, the immigration quota for "persons of Chinese ancestry" was set at only 105 per year); 1952, the McCarran-Walter Act overturns 1790 legislation restricting citizenship to "free white persons" (the immigration quota for Asians is, in turn, set at 2,990); 1965, the Immigration Act puts an end to the national origins quota system which had severely restricted Asian immigration since 1924.

From a socio-historical and anthropological point of view, Daoism in North America is poorly documented and almost completely unknown. With regard to the first one hundred years of Chinese immigration, from 1849 to 1950, we currently know next to nothing about a Daoist presence in North America. This may remain the case. I do not know of any individual or teacher in North America who identified himself or herself as a Daoist during this time period. One possible exception is the "Daoist" representative at the World's Parliament of Religion held in Chicago in 1893. Here a talk on Daoism was given, later published anonymously as "Taoism, a Prize Essay." The speaker and author are unknown, and a number of conjectures are possible. From my perspective, the least likely is that

the person was an ordained or lineage-based Daoist. Based on the tone and content, it also seems unlikely that the person considered himself to be a Daoist. While intriguing, the identity of this person remains unknown. Any discovery concerning this "Daoist" or Daoism in North America during 1849 through 1950 would be a welcome contribution.

At the present time, and from a tentative historical point of view, it seems that the earliest identifiable and self-identified Daoist priest, whether Chinese or non-Chinese, in North America is Share K. LEW (b. 1918). Share Lew was born in Guangdong province, north of Guangzhou. As an orphan, Share Lew was taken in by a wandering monk from Wong Lung Kwan 黃龍觀(Huanglong guan; Yellow Dragon Monastery). Eventually he was taken to this monastery in the Luofu shan 羅浮山 (Mount Luofu) area. After an apprenticeship of several years of menial labor, he was initiated and taught a variety of Daoist practices, including Daoist health and longevity techniques. This Daoist system is called Tao Ahn Pai 道丹派 (Daodan pai; Daoist Elixir sect), an internal alchemy system claiming Lii Dongbin as its founder. Share Lew lived and studied at Wong Lung Kwan for thirteen years. He left the monastery in 1948, shortly before the Communist revolution and moved to San Francisco, where he stayed within the Chinese community for several years studying Gongfu 功夫(Kung Fu) with his uncle LEW Ben. In 1959, Share Lew accepted his first non-Chinese student and in 1970 began to teach Qigong to non-Chinese students. In that year, he and the late Khigh DHIEGH (Kenneth Dickerson; 1910-1991), a television actor, formed the Taoist Sanctuary in Los Angeles (now based in San Diego). According to one of Lew's biographers, this was the first Daoist

religious organization to receive federal status as a church. In 1979, Share Lew moved to San Diego, where he still resides, seeing people for health appointments, teaching small or private classes, and traveling to teach his students in workshops around the United States.

A number of other Chinese, East Asian, Euro-American, and Russian Daoist practitioners are now established in North America. Some of the most public and recognizable figures and organizations are the following: Alex Anatole (b. 1941?; immigrated, Massachusetts, 1978?) and the Center of Traditional Taoist Studies (CTTS), based in Weston, Massachusetts; Mantak CHIA 謝明恵 (b. 1944; immigrated, New York, 1979), Michael Winn (b. 1951), and Healing Tao, based in New York City; Ken Cohen (Gao Han 高漢; b. 1952) and the Qigong Research and Practice Center (formerly Taoist Mountain Retreat), based in Nederland, Colorado; Bill Helm (d.u.) and the Taoist Sanctuary of San Diego; Hsien Yuen 玄元 (b. 1938?; immigrated, New York, 1979?) and the American Taoist & Buddhist Association (ATBA; Meiguo daojiao fojiao lianhe xiehui 美國道教佛教聯合協會), based in New York City; Liu Ming 劉明 (Charles Belyea; b. 1947) and Orthodox Daoism in America (ODA), now based in Oakland, California; Harrison Moretz (Mo Chenghua 墨承華; b. 1952) and the Taoist Studies Institute (TSI; Daojiao xueyuan 道教學院)/Temple of the Mysterious Pivot (Xuanji guan 玄機觀), based in Seattle, Washington; MOY Lin-shin 梅連羨 (1931-1998; immigrated, Toronto, 1970) and the Taoist Tai Chi Society (TTCS; Daojiao Taiji quan she 道教太極拳社)/Fung Loy Kok 蓬萊閣 (FLK; Penglai ge), based in Toronto, Canada; Ni Hua-ching (Ni Qinghe 倪清和; b. 1931?; immigrated, Los Angeles, 1976) and Universal Society of the Integral Way (USIW), based in Los Angeles; Brock

Silvers, the Taoist Restoration Society, and the U.S. Taoist Association, now based in Honolulu, Hawaii; and Solala Towler (b. 1950), The Abode of the Eternal Tao, and *The Empty Vessel: Journal of Contemporary Taoism,* based in Eugene, Oregon.[67]

With this general account of Daoism in place, one may better understand and appreciate the religious tradition *which is Daoism* and the historical precedents that have been established by the earlier Chinese tradition. This also allows practitioners to reflect on and determine the extent to which what they are doing is "Daoist." Considering Daoist practice in particular, there are various "models" that emerge through the careful consideration of the entire breadth of

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[67] Ihave not included New Age discourse communities, representatives of Perennial Philosophy, or so-called "philosophical Daoists."I have also not included Western popularizers of "Taoism" such as John Blofeld (1913-1987), Alan Watts (1915-1973), Gia-fu Feng (1919-1985; Stillpoint Foundation; Manitou Springs, Col.), A1 Chung-liang Huang (b. 1937; Living Tao Foundation/Lan T'ing Institute; Urbana, Ill.).and Stephen Chang (Foundation of Tao; San Francisco). For more historical, critical information on Daoist teachers and organizations in North America see Komjathy 2003c; 2003d; 2004; 2006; Siegler 2003. Lists of Daoist groups may be found at <www.daoistcenter.org>, <www.taorestore.org>, and <www.pluralism.org/directory>. None of these or any other teachers or organizations are recommended here. Prospective students must rely on their own orientations, needs, interests, and common sense. However, chapter six of the *Zhuangzi* provides some insight in this respect: ƎMaster Si, Master Yu, Master Li, and Master Lai were all talking together. 'Who can regard non-action (*wuwei* 無爲) as his head, life (*sheng* 生) as his back, and death (*si* 死) as his rump? Who can regard death and life, existence and annihilation, as a single body? I will be his friend.' The four men looked at each other and smiled. There was no obstruction in their heart-minds (*mo ni yu xin* 莫逆於心) and so they became friends."

the tradition.[68] These include but are not limited to ritualistic, cosmological, quietistic, hermeneutical, therapeutic, alchemical, shamanic, and mystical. Most often, a variety of these models are contained and combined in any given training regimen or lifeway, and these approaches can be individual or communal. Moreover, often such combinations, on deeper consideration, can be in conflict with each other.[69] From my observations of Daoism in the West, most people are practicing or interested in a "self-cultivation" approach. This involves a wide range of concerns and motivations: from personal health and healing through self-realization to mystical

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[68] These models may be placed in dialogue with various Daoist views of death and the afterlife. Concern over death and dying may be *the* underlying influence in any given Daoist lifeway. For example, in chapter two of the *Zhuangzi,* we find the following: "How do I know that loving life is not a delusion? How do I know that in hating death I am not like someone who, having left home in his youth, has forgotten the way back....Find harmony through celestial equanimity (*tianyi* 天倪), leave things to their endless changes, and so live out your years....Forget the years, forget distinctions. Leap into the boundless and make it your home." And in chapter six: "I received life because the time had come; I will lose it because the order of things passes on. Be content with this time and dwell in this order and then neither sorrow nor joy can touch you. In ancient times this was called 'freeing the bound' (*xianjie* 旱糸解)." The quietistic approach of classical Daoism emphasized merging with the unending changes of cosmological processes. Here death was simply an ontological given, a transformation no different than waking up (or not waking up) to a new day. In contrast, later immortality seekers envisioned a life in subtle realms that was liberated from the limitations of space and time. Here one could so transform oneself as to join a divine bureaucracy or live in terrestrial paradises. However, for some alchemists, the goal of alchemy was seen as the same as that of the classical tradition: to align oneself with larger cosmic transformations and to disappear in unification.

[69] Part of what is fascinating about the study of Daoism (and religious traditions in general) is to observe the diverse attempts of Daoist practitioners to reconcile such approaches into a coherent and harmonious system.

unification.[70] That is, various self-cultivation models are embraced, advocated, and taught in the West, especially therapeutic, quiestistic, alchemical, and mystical.[71]

Considered holistically, **Daoist practice** (Taoist practice) consists of cosmology, "theology" (discourse on the sacred), observation, practice principles and guidelines, meditation, health and longevity practices, ethics, dietetics, scripture study, seasonal attunement, geomancy, and ritual.[72] At the root of these various dimensions of Daoist practice resides a commitment to self-cultivation and a recognition of the Dao as unnamable mystery and all-pervading numinosity. One endeavors to establish and maintain a connection with the sacred and realize the Dao as one's own essential

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[70] Livia Kohn has identified three distinct types of Daoist "lineages" in America, namely, ritual, self-cultivation, and self-improvement (Kohn 2001a, 198). See also Komjathy 2004.

[71] There is also the trend of assimilating "Daoist" practice into the larger American "health and fitness," "alternative medicine," and New Age movements. See Komjathy 2006.

[72] Various modern attempts to define the parameters of Daoist practice have been made. Some examples include Min 1990; Ni 1995; 1997; Liu 1998; Kohn 2001b; Silvers 2005. See also "Contours of Practice" on the Center for Daoist Studies website. Much still remains to be rectified and clarified for Daoism to become a viable and meaningful religious tradition outside of China. In the case of the United States, one could compare this situation to that of Buddhism, specifically Zen Buddhism, thirty or so years ago. We still await the formation of viable American Daoist communities inhabiting specifically Daoist spaces, the training of individuals in deep and authentic practice, and the publication of comprehensive and systematic manuals similar to those of other religious traditions. With regard to the latter, I am thinking specifically of various books on Zen practice, including Philip Kapleau's *The Three Pillars of Zen,* Katsuki Sekida's *Zen Training: Methods and Philosophy,* Omori Sogen's *An Introduction to Zen Training,* Hakuyu Taizan Maezumi's *On Zen Practice,* and John Daido Loori's *The Eight Gates of Zen.*

being, one's own innate or original nature (*benxing* 本性). Such are the parameters of a Daoist way of life rooted in religious vocation and religious training.

While *Handbooks for Daoist Practice* technically falls within the category of "scripture study," these texts in fact address most of the various dimensions of Daoist practice. Close reading, deep contemplation and dedicated application reveal the benefit and importance of scripture study for Daoist practice. The translations contained in this series are "handbooks for Daoist practice" precisely because they orient one towards the Dao and because they provide principles and instructions for "cultivating the Dao" (*xiudao* 修道). Such is the connective tissue that creates a network between them. In the present selection of Daoist texts, one finds guidance concerning **cosmology and theology** (*Inward Training, Book of Venerable Masters, Yellow Thearch's Basic Questions, Scripture on Clarity and Stillness, Scripture on the Hidden Talisman),* **meditation** (*Inward Training, Book of Venerable Masters, Scripture on Clarity and Stillness, Scripture for Daily Internal Practice, Redoubled Yang's Fifteen Discourses, Book of Master Celestial Seclusion),* **health and longevity practices** (*Inward Training, Book of Venerable Masters, Yellow Thearch's Basic Questions, Redoubled Yang's Fifteen Discourses),* **ethics** (*Inward Training, Book of Venerable Masters, Scriptural Statutes of Lord Lao, Redoubled Yang's Fifteen Discourses),* **dietetics** (*Inward Training, Yellow Thearch's Basic Questions),* **and seasonal attunement** (*Yellow Thearch's Basic Questions).* In addition, each of these texts contains important insights into purification, observation and spiritual realization.

What one must keep in mind, and this is of cardinal significance, is that “Daoist practice” cannot be and should not be reduced to a mere set of techniques. Specific forms of seated meditation (*dazuo* 打坐) and nourishing life methods (*yangsheng shu* 養生術) are necessary at different stages of cultivation, but Daoist practice is multi-dimensional and based on personal requirements. Deep, authentic and holistic Daoist practice is based on internal cultivation (*neixiu* 内修) and is rooted in sustained and dedicated training as a life-long undertaking. For this, there is some helpful advice. Attend to your own practice-realization and remain unconcerned about other's accomplishments or lack thereof. Endeavor to free yourself from considering or ruminating about who is a “real Daoist.” It is also important not to allow other people to deny, marginalize, or obstruct your undertaking. Simultaneously, abstain from reacting to or criticizing others. Allow your life and practice to be a transformational presence in the lives of others, to contribute to their self-unfolding as manifestations of the Dao. When you meet those with whom you have a natural affinity and whose communication expresses something important and real, do your best to learn from them. Incorporate what is beneficial and discard what is deficient. In short, trust your own experience and maintain your own practice. Compare yourself to no one, and take nothing personally. From a Daoist perspective, each person's innate nature (*xing* 性), the heart-mind (*xin* 心) with which one was born (*sheng* 生), *is* the Dao. One may be distant from the Dao, but the Dao is never distant.

There can be little doubt that **“scripture study"** has occupied a central place in the Daoist tradition itself. The extant Daoist Canon, compiled in the Ming dynasty (1368-1644), as well as “extra-

canonical collections" contain numerous commentaries (*zhu* 註) on earlier Daoist scriptures. As the late Isabelle Robinet (1932-2000), a pioneer in the field of Daoist Studies and the foremost Western scholar of Daoist commentaries on the *Daode jing,* has shown, there are over one hundred extant commentaries on the *Daode jing* in the Ming-dynasty canon alone. In addition, we have commentaries on such texts as the *Huangting jing* 黃庭經 (Scripture on the Yellow Court), *Yinfu jing* 陰符經 (Scripture on the Hidden Talisman), and *Qingjing jing* 清靑爭經 (Scripture on Clarity and Stillness), among others. Unfortunately, next to none of this commentary literature has been translated to date.[73] The sheer volume of this hermeneutical tradition points towards the importance of the study and application of Daoist scriptures to the life-worlds of individual adepts and cultivation communities.

It is clear from the extant commentaries that certain texts received a venerated place in the Daoist tradition. These texts were frequently read in terms of the immediate concerns and practice modalities of a given religious community. For instance, in the context of internal alchemy (*neidan* 內丹) lineages, the *Daode jing* was often understood as directly applicable to alchemical transformation. Moreover, the texts that were seen in this light were considered "revelatory," often containing the phrase "as spoken by the great high Lord Lao" (*Taishang laojun shuo* 太上老君說). That is, these particular texts were "scriptures" (*jing* 經); they were understood to be "sacred" or emanations of the Dao. The character for "scripture," like Chinese characters in general, contains two elements: the *si* 丝 ("silk")

[73] That is, except for the commentaries on the *Daode jing* mentioned above.

on the left, and the *jing* 巠, ("well") phonetic on the right. A further etymological reading of this character might suggest that the *jing* phonetic is also a meaning-carrier. Under this reading, "scriptures" are threads and watercourses that form and re-form networks of connection. They connect the Daoist practitioner to both the unnamable mystery which is the Dao and the Daoist tradition, the community of adepts that preceded one, as a historical continuum.

If one then considers **how to read Daoist texts *as a practitioner,*** one would engage a given text as directly relevant to one's immediate situation. That is, Daoist texts provide principles and practice guidelines, as well as specific practices, for cultivating the Dao (*xiudao* 修道). However, creative and critical engagement also requires the recollection of the interrelationship among knowledge, insight, practice, and experience. These texts create the context for dialogue and discussion. One should not read these texts as authoritarian mandates or fail to consider the ways in which one's own realizations relate to the text at hand. As the *Lijiao shiwu lun* 立教十五論(Fifteen Discourses to Establish the Teachings; DZ 1233), attributed to Wang Chongyang 王重陽, the founder of Quanzhen 全真 (Complete Perfection), advises,

> The way to study texts is not to strive after literary accomplishments, and thereby confuse your eyes. Instead, you must extract the meaning as it harmonizes with the heart-mind (*xin* 心). Abandon texts after you have extracted their meaning (*yi* 意) and grasped their principle (*ji* 理). Abandon principle after you have realized the fundamental ground (*qu*

趣). After you realize the fundamental, then attend to it until it completely enters the heart-mind. (2ab)

One also should not fail to confront, nor attempt to domesticate, the radical challenges that often arise through familiarity with Daoist literature. From a praxis-based perspective, these texts are here to clarify one's practice and to transform one's life.

For those committed to Daoist cultivation, Daoist texts are practice manuals. They contain detailed principles, guidelines, practices, goals, and ideals for a Daoist way of life. Daoist cultivation in turn involves self-reliance, responsibility (the ability to respond), and transformation. Daoist cultivation aims at a shift in ontological condition, a movement from habituated ways of being to more refined patterns of interaction. This process may be understood as a return to one's original endowment from the Dao (suchness or being-so-of-itself [*ziran* 自然])and/or as the emergence of a new being (from *ren* 人 [human] to *xian* 仙 [immortal or transcendent]). "Returning to the Source (*guigen* 歸根) is called stillness (*jing* 靜); this means returning to life-destiny (*guiming* 歸命). Returning to life-destiny is called constancy (*chang* 常); knowing constancy is called illumination (*ming* 明)" (DDJ ch. 16; also 52). The later Daoist tradition, specifically internal alchemy lineages, speak of such an orientation and commitment in terms of innate nature (*xing* 性) and life-destiny (*ming* 命). The character *xing* consists of *xin* 心 (heart-mind") and *sheng* 生 ("to be born"); innate nature is the heart-mind with which one was born. The character *ming* may be associated with *ling* 令 ("mandate"); life-destiny is a decree from the cosmos made manifest as one's corporeality. Generally speaking, innate nature relates to

consciousness and the heart-mind (*xin* 心), while life-destiny relates to physicality and the body (*shen* 身). Daoist practice involves the dual cultivation of innate nature and life-destiny, a commitment to both stillness (meditation, for example) and movement (*daoyin* 導引 for example) practices.

At the most fundamental level, health and well-being are prerequisites for more advanced training. Here health is understood as internal harmony and integration. Following a classical Chinese medical understanding, as expressed in texts such as the *Huangdi neijing suwen* 黃帝內經素問 (Yellow Thearch's Inner Classic: Basic Questions),[74] health consists of the smooth flow of qi throughout the body's various "organs" (*zangfu* 臟腑) and meridians (*mai* 脈). However, health and well-being also involve attentiveness to larger seasonal and cosmological cycles. Generally speaking, the *Yellow Thearch's Basic Questions,* an anonymous text containing textual and historical layers from the second century B.C.E. to the sixth century C.E., emphasizes a preventative approach to illness: "Sages (*shengren* 聖人) do not regulate diseases (*bing* 病) after they are already a disease. They regulate them before they arise. They do not regulate disorder (*luan* 亂) after it is already disorder. They regulate it before it is disorder" (ch. 2). The *Yellow Thearch's Basic Questions* provides principles, guidelines, and models for living in harmony with larger

[74] While the categorization of the *Yellow Thearch's Basic Questions* as Daoist or Daoistic may be problematic in certain respects, especially with regard to its "original context of composition," there can be little doubt that it has exerted a profound influence on the later Daoist tradition. The foundational view of health and well-being in Daoist self-cultivation lineages considered more generally is the same as that expressed in the *Yellow Thearch's Basic Questions* and related texts. Emphasis is placed on conservation, regulation, harmonization, and alignment.

seasonal and cosmic cycles. The text is fundamentally about how to live well, which herein means a regulated and harmonious life that recognizes the larger context of one's being. In some sense, the *Yellow Thearch's Basic Questions* contains an ecological worldview, emphasizing interconnection and larger patterns of influence and dependency. The text advocates attentiveness to internal and external cycles, which affect one's overall health, well-being, and spiritual alignment. It is delusion to believe that one is unaffected by and independent from ever-expanding spheres of relationship: familial, communal, cultural, regional, national, global, and cosmological. For example, how can lunar cycles shift oceanic tides and not influence internal human conditions? The *Yellow Thearch's Basic Questions* documents the basic constituents and subtle physiology of human beings and the ways in which these are affected by larger cycles.

The first two chapters of the *Yellow Thearch's Basic Questions* also emphasize conservation and harmonization. When expressed in a vague way like "be natural," such guidelines can easily be scoffed at and dismissed out of hand or seen as justification for some unregulated ("spontaneous" [read: egocentric and libertine]) way of life. But when considered from an energetic and "astro-geomantic" perspective and knowledge-base, various influences and networks become visible. In terms of the view expressed in the *Yellow-Thearch's Basic Questions,* the most fundamental form of harmonization begins with the body-self. One regulates one's eating, drinking, sexual activity, and sleeping. One also becomes attuned to the internal circulation of qi, the condition and tendencies of the organs, and the overall condition of one's being. The next sphere of influence is one's immediate place; this relates to relationships,

communal influences, as well as locality and region. These involve the possibility of "invasion" and disruption by external pathogenic influences (EPIs). The first two chapters of the *Yellow Thearch's basic Questions* clearly understand such causes of disease (*bing* 病) as relating to one's own way of life and naturalistic harmful influences. The latter includes the so-called "six climatic influences" (*liuqi* 六氣): wind (*feng* 風), dryness (*gan* 乾), dampness (*shi* 濕), cold (*han* 寒), summer heat (*shure* 暑熱), and fire (*huo* 火) (see also ch. 8; chs. 66-74). A more complete understanding also recognizes other influences, such as vacuity (*xu* 虛), noxious influences (*xie* 邪), injurious winds (*zeifeng* 賊風), and wind-cold (*hanfeng* 寒風). That is, specific natural phenomena have the capacity to disrupt one's internal equilibrium and health, giving rise to disease. From a practical perspective, this means that, in addition to self-regulation and energetic strengthening, one avoids exposure to such potentially harmful influences. For instance, Daoist adepts frequently emphasize not exposing oneself to strong winds, heavy rain, and snow. If one must travel or move in such conditions, certain precautions are taken, such as covering the neck, lower back/kidneys, and shoulders with extra insulation. This involves the more general understanding that the lower body is associated yin and thus may be especially affected by cold and dampness, while the upper body is associated yang and thus may be especially affected by heat and wind. More specifically, dampness may easily affect the feet and ankles, cold the knees and lower back, and wind the upper back, neck, and head.

In a more positive sense, one attempts to live in more nourishing environments and become aware of the energetic qualities of place. There are a number of dimensions to this, including "ecological" and cosmological aspects. With regard to the former, one recognizes the

effects of "landscape" (Fengshui 風水; geomancy), the places within which one is located and the communities within which one participates. Generally speaking, "natural places" contain a cleaner and more refined energetic quality. Locations with specific attributes, mountains, streams, forests, wildlife, etc., are most beneficial for human flourishing and harmonization. More specifically, there are types of mountains, trees, birds, etc., which each have a particular quality and influence. For example, pine trees have a strong yang quality, including a powerful upward movement. For someone with a tendency towards stagnation, it may beneficial to live among pines. However, for someone with a tendency towards liver-yang rising and headaches, pine trees can exacerbate such conditions. Cosmologically speaking, the most easily observable and recognizable patterns involve the seasons and the sun and moon cycles. Following the seasonal cycles means becoming attentive to and resonating with their energetic qualities. Spring is associated with birth (*sheng* 生) and an outward energetic direction, summer with development (*chang* 長) and an upward energetic direction, autumn with harvesting (*shou* 收) and an inward energetic direction, and winter with storing (*cang* 藏) and a downward energetic direction. Agriculturally speaking, and note that the Daoist tradition frequently emphasizes "internal cultivation" (*neixiu* 內修), spring is the time to plant seeds, summer to allow maturation, autumn to harvest, and winter to store. Cosmologically speaking, the cycles of the sun and moon are particularly important (astrology/astronomy). In this respect, practicing Daoists give increased attention to the new and full moon and the so-called Eight Nodes (*bajie* 八節): the beginning of the four seasons and the solstices and equinoxes. The emphasis on harmonious internal conditions, the uninterrupted flow of qi through the organ-

meridian networks, and larger patterns of ecological and cosmological alignment and integration are the foundation of Daoist self-cultivation.

Another core guideline for Daoist practice centers on conservation or non-dissipation. In Daoist texts as historically distant as the anonymous fourth-century B.C.E. "Neiye" 內業 (Inward Training) and *Laozi* 老子 (*Book* of Venerable Masters), anonymous sixth-century C.E. *Yinfu jing* 陰符經 (Scripture on the Hidden Talisman; DZ 31), and anonymous eighth-century *Qingjing jing* 清靜經 (Scripture on Clarity and Stillness; DZ 620), one finds repeated admonitions to refrain from behavior patterns that dissipate one's foundational vitality. *Inward Training* understands Daoist practice as ultimately connected to consciousness and spirit (*shen* 神), with particular emphasis placed on the ability of the heart-mind (*xin* 心) either to attain numinous pervasion (*lingtong* 靈通) or to separate the adept from the Dao as Source. Here the heart-mind is understood both as a physical location in the chest (the heart [*xin* 心] as "organ" [*zang* 藏/臟])and as relating to thoughts (*nian* 念) and emotions (*qing* 情) (the heart as "consciousness" [*shi* 識]). Intellectual and emotional activity is a possible source of dissipation and disruption. However, when stilled (*jing* 靜) and stabilized (*ding* 定), the heart-mind is associated with innate nature (*xing* 性), the givenness (*ziran* 自然) and the actualization (*xiu* 修) of one's innate endowment from and connection with the Dao. This return to one's original nature (*benxing* 本性) is the attainment of mystical unification (*dedao* 得道).

Inward Training is clearly concerned with possible sources for the dissipation of vital essence (*jing* 精), vitality (*sheng* 生), and spirit

(*shen* 神). As the title suggests, emphasis is placed on cultivating the internal (*nei* 内), as innate connection to the Dao, over the external (*wai* 外), as potential disruption of one's personal harmony and stability. *Inward Training* identifies various psychological tendencies and patterns that may lead to disruption and destabilization. Vitality may be lost and the heart-mind confused through specific emotional and intellectual activities; such conditions include grief (*you* 憂), happiness (*le* 樂), pleasure (*xi* 喜), anger (*nu* 怒), desire (*yu* 欲), anxiety (*huan* 患), and profit-seeking (lì 利). It should be mentioned that these aspects of human being are not, generally speaking, inherently harmful; rather, it is excessive and inappropriate activity and expression that exhausts one's vitality and numinosity. "Considering the vitality (*sheng* 生) of human beings, it inevitably occurs because of balance (*ping* 平) and alignment (*zheng* 正). The reason why balance and alignment are lost is inevitably because of pleasure (*xi* 喜), anger (*nu* 怒), grief (*you* 憂), and anxiety (*huan* 患)" (ch. 22). The loss of this vitality, associated with the dissipation of vital essence, destabilizes the foundations for more advanced inward training, which center on the heart-mind and spirit. An additional source of disruption and disturbance is the "five desires" (*wuyu* 五欲), which relate to the "five senses" (*wuguan* 五官) and their concern with the external. These include desire generated by hearing (ears), seeing (eyes), tasting (tongue), smelling (nose), and touching (body). "Regulate the five sense-desires and cast off the two misfortunes (*erxiong* 二凶). When both joy and anger [the two misfortunes] are negated, balance and alignment will permeate your torso" (ch. 21).

Similarly, the *Book of Venerable Masters* advocates a way of life based on "decreasing" (*shao* 少) and "lessening" (*gua* 寡). "Appear

plain (*jiansu* 見素) and embrace simplicity (*baopu* 抱樸); decrease personal interest (*shaosi* 少私) and lessen desires (*guayu* 寡欲)" (ch. 19; also ch. 37). The heart-mind (*xin* 心) and one's innate nature (*xing* 性) become obscured by desire (*yu* 欲), knowing (*zhi* 知), contending (*zheng* 爭). selfishness (*si* 禾人), and excess (*tai* 泰). "Thus we may consider the sage's approach to governing (*zhi* 治) —Empty the heart-mind (*xu qi xin* 虛其心) and fill the belly (*shi qifu* 實其腹). Weaken the will (*ruo qi zhi* 弱其志) and strengthen the bones (*qiang qi gu* 強其骨)" (ch. 3; also ch. 12).[75] On the most basic level, this passage emphasizes living closer to necessity and sustenance. However, from a Daoist perspective, "governing the country" (*zhiguo* 治國) also relates to "governing (regulating or healing) the body-self" (*zhishen* 治身). To empty the heart-mind is to decrease excessive intellectual and emotional activity; to fill the belly, *fu* 腹 also refers to the lower abdominal region, is to increase the qi stored in the body's center.

The emphasis on the sense-organs and external concerns as possible sources of dissipation also finds expression in the *Scripture on the Hidden Talisman* and *Scripture on Clarity and Stillness.* The *Scripture on the Hidden Talisman* explains that the Five Thieves (*wuzei* 五賊) disrupt the human heart-mind. Under one interpretation, the Five Thieves are excitement (*xi* 喜), excessive joy (*le* 樂), grief (*ai* 哀), desire (*yu* 欲), and anger (*nu* 怒). Dissipating spirit and qi, the Five Thieves destabilize the heart-mind. The scripture also explains that "The aberrations of the Nine Cavities are in the Three Essentials" (1a). The Nine Cavities (*jiuqiao* 九竅) refer to the nine openings in

[75] The character *zhi* 治, here translated as "to govern," also means "to regulate" as well as "to heal."

the body, including eyes, ears, nose, mouth, anus, and urethra (see also *Inward Training* ch. 15). The Three Essentials (*sanyao* 三要) refer to the three orifices through which qi is most easily lost: the eyes (*mu* 目), ears (*er* 耳), and mouth (*kou* 口). Here the emphasis is on sealing the senses to prevent dissipation and distraction. This recalls the end of chapter seven of the *Zhuangzi* 莊子(Book of Master Zhuang):

> The emperor of the southern ocean was called Brevity (Shu 儵). The emperor of the northern ocean was called Suddenness (Hu 忽). The emperor of the Center was called Primordial Chaos (Hundun 混沌). Brevity and Suddenness often met in the land of Primordial Chaos, and Primordial Chaos treated them very generously. Brevity and Suddenness discussed how they could repay the inner power (*de* 德) of Primordial Chaos. They said, "All people have the Seven Cavities (*qiqiao* 七發) so that they can see, hear, eat, and breathe. Primordial Chaos alone does not have them. Let's try boring some." Each day they bored another hole. On the seventh day Primordial Chaos died.

Like the disruption caused to Hundun's primordial unity through increasing differentiation, the sense organs may confuse and destabilize the Daoist adept's innate nature. Differentiated and conditioned modes of being separate one from one's original context of interrelationship.

The *Scripture on Clarity and Stillness* suggests that the practice of observation (*guan* 觀) and the development of clarity (*qing* 清) and

stillness (*jing* 靜) allow one to abide in suchness (*ziran* 自然). In this ontological condition, the "Six Desires" do not arise and the "Three poisons" are dispersed. The Six Desires (*liuyu* 六欲) are those originating from the six sense-organs (*liugen* 六根): eyes (sight), ears (sound), nose (smell), mouth (taste), body (touch), and mind (thought). The Three Poisons (*sandu* 三毒) are greed (*tan* 貪), anger (*chen* 嗔), and ignorance (*chi* 痴). By freeing oneself from the Six Desires and Three Poisons, by developing clarity and stillness, one awakens to innate nature (*xing* 性). As mentioned, innate nature is the heart-mind with which one is born. It is the personal half of the talisman—one's original connection to and attunement with the Dao. To cultivate clarity and stillness is to realize innate nature. This is nourishing the root; this is returning to the Dao.

In a later development, influenced by internal alchemy (*neidan* 內丹), the anonymous thirteenth-century C.E. *Nei riyong jing* 內日用經 (Scripture for Daily Internal Practice; DZ 645) advises the aspiring adept to nourish and protect the Seven Treasures (*qibao* 七寶), namely, vital essence, blood, qi, marrow, the brain, the kidneys, and the heart. The *Scripture for Daily Internal Practice* suggests that the Daoist adept should consider and reflect on the various ways in which the Seven Treasures are dispersed. These aspects of human being are not simply substances and organs; it is also important to recognize the related associations, specifically the Five Phase correspondences. For instance, becoming overly engaged in listening may be detrimental to the kidneys and dissipate vital essence. Excessive emotional and intellectual activity may injure the heart, thus leading to instability of spirit. One should in turn adopt lifeways and practices that preserve and nourish the Seven Treasures.

Thus, at its most fundamental level, Daoist cultivation involves conservation, self-refinement, and cosmological attunement. Through a commitment to "inward training," through the cultivation of clarity and stillness, one realizes and actualizes one's innate connection with the Dao. One comes to be an *embodi*ment of the Dao through one's being-in-the-world. For anyone interested in developing a root in Daoist practice, Daoist texts provide guidance and clarification. Inspired by the *Book of Venerable Masters,* the so-called "Nine Practices" (*jiuxing* 九行) as contained in the sixth-century *Laojun jinglu* 老君經律 (Scriptural Statues of Lord Lao; DZ 786) represent an important beginning:

> Practice non-action.
> Practice softness and weakness.
> Practice guarding the feminine. Do not initiate actions.
>
> Practice being nameless.
> Practice clarity and stillness.
> Practice being adept.
>
> Practice being desireless.
> Practice knowing how to stop and be content.
> Practice yielding and withdrawing.

Regarding **the selection of the various handbooks for Daoist practice** translated here,[76] I have utilized a number of criteria. Based on discussions with Daoist teachers and practitioners in North America and my observation and consideration of Daoist organizations in North America, I have recognized the personal nature of Daoist practice here and the need for relevant texts from the Daoist tradition. As there are few Daoist ritual communities and no Daoist monastic centers in North America as yet, it makes little sense in a series such as this to translate texts that discuss the performance of ritual or monastic requirements.[77] Instead, I have selected praxis-oriented texts that relate most clearly to "self-cultivation," although the imagined identity of a separate "self" does not last very long in the course of Daoist training. This foundation of self-cultivation may enable the development of more dedicated forms of communal involvement as well. As the "Daxue" 大學 (Great Learning) chapter

[76] Almost all of the texts translated are recognized as central to the Daoist tradition. However, the reader should note that by including the *Huangdi neijing suwen* 黃帝內經素問 (Yellow Thearch's Inner Classic: Basic Questions), a classical Chinese medical text, I am not claiming that this work is "Daoist." Rather, I am suggesting that such an understanding is necessary for Daoist training. In this way, the *Suwen* may be seen as a "handbook for Daoist practice." While Chinese medicine is not Daoist per se, there are important cross-pollinations, and there can be little argument that Chinese medical models provided some of the foundations for a variety of Daoist movements. In addition, certain individuals were practitioners of both Chinese medicine and Daoism, perhaps the most famous being Sun Simiao 孫思邈 (581-682).

[77] For a historically annotated catalogue of Daoist texts in translation see Komjathy 2003b. Alternative glimpses into and models of Daoist practice may be found by reading Livia Kohn's *The Taoist Experience* (*1993*) and Stephen Bokenkamp's *Early Maoist Scriptures* (1997). Issues of authorship and dating of Daoist texts are clarified *in The Taoist Canon: A Historical Companion to the Daozang* (2004), edited by Kristofer Schipper and Franciscus Verellen.

of the *Liji* 禮記 (Book of Rites), a central text in the Confucian tradition, explains,

> Those in antiquity who wished to illuminate luminous virtue throughout the world would first govern their states; wishing to govern their states, they would first bring order to their families; wishing to bring order to their families, they would first cultivate their own persons; wishing to cultivate their own persons, they would first rectify their heart-minds; wishing to rectify their heart-minds, they would first make their thinking sincere; wishing to make their thinking sincere, they would first extend their knowledge. The extension of knowledge lies in the investigation of things. It is only when things are investigated that knowledge is extended; when knowledge is extended that thinking becomes sincere; when thinking becomes sincere that the heart-mind is rectified; when the heart-mind is rectified that the person is cultivated; when the person is cultivated that order is brought to the family; when order is brought to the family that the state is well governed; when the state is well governed that peace is brought to the world.

The Daoist texts translated in *Handbooks for Daoist Practice* have also been selected for conciseness and accessibility. Most of the present handbooks are relatively brief, while containing a certain concentrated insight. Such length restrictions make them more inviting and less intimidating to the potential reader. The observant reader will also notice that there is some repetition throughout the handbooks; this is done in order to ensure that each handbook is self-

contained and that key points are reemphasized. I have also attempted to keep "scholarly conventions" at a minimum in order to increase accessibility. These handbooks are thus easily consulted in almost any time frame. In this way, Daoist practice may include every activity, and not be simply a hobby or recreational activity. One does not need to "make time" for Daoist cultivation.

Throughout the process of reading, re-reading, researching, interpreting, and translating these handbooks for Daoist practice, I have developed and refined my own translation methodology. I have created a format that I believe enables the interested reader to deepen their engagement with and understanding of Daoist literature. Each translation in turn consists of a brief historical and technical introduction, the translation proper, and the original Chinese text. In the case of the Chinese texts, I have included punctuated versions that follow the conventional Western formatting: words arranged left to right and top to bottom. This stands in contrast to classical Chinese texts, in which characters are arranged from top to bottom and right to left. This format was adopted to make the texts more accessible and aesthetically congruent. Traditionally speaking, classical Daoist texts are unpunctuated, so I have tried to use the simplest punctuation possible. I have also endeavored to develop a standardized technical terminology that adequately approximates the original Chinese. In each case, I discuss these important technical terms in the introduction, often indicating when alternative readings are possible as well. In addition, as these translations are intended to be "handbooks for Daoist practice," I have contemplated and tried to explain the ways in which Daoist practitioners have, do and would read them. This involves translating each text as praxis-oriented,

which in most cases they historically are. With regard to the *Laozi* 老子 (Book of Venerable Masters) or *Daodejing* 道德經 (Scripture on the Dao and Inner Power) in particular, this involves emphasizing certain chapters while de-emphasizing others, and reading certain more potentially "political" phrases as referring to Daoist praxis. In terms of the latter, I have translated *shi* 士, sometimes conventionally rendered as "knight" or "scholar-idealist," as "adept." This too may be historically viable in addition to being experientially sound.

The translation of these Daoist scriptures and related texts has benefited from the various translations mentioned in the introduction to each text. I am grateful for the guidance of the translators who came before me. Translating such challenging texts is always aided by a previous translation, regardless of one's reservations concerning that work. In terms of citation method, Daoist texts, as reprinted in the Ming-dynasty Daoist Canon, form "scrolls" (*juan* 卷), which vary in length, and "folios" (*ce* 冊). These folios in turn consist of "pages" (*ye* 葉). Thus, when citing a Daoist text consisting of more than one scroll, one first places the scroll number (Arabic numerals), followed by a "period," the page number (Arabic numerals), and section number (letters [a/b] derived from the Greek alphabet). If one were citing from the second section of the ninth page to the first section of the tenth page of the fourth scroll of a five-scroll text, one would write the following: 4.9b-10a.

The present series was undertaken in respect for the sacred standing of these works in the Daoist tradition and in hopes that Daoism may gain a deeper root in the English-speaking world. In some sense, I endeavored to follow the practice guideline from the "Neiye" 內業

(Inward Training) chapter of the *Guanzi* 管子 (Book of Master Guan): "Inwardly still, outwardly reverent" (*neijing waijing* 內靜外敬). It is my sincere hope that the lives of readers will be nourished and deepened by the insights and guidance of these handbooks for Daoist practice. May they lead to a deeper understanding of the Daoist tradition and Daoist practice. May they lead to more dedicated cultivation (*xiu* 修), refinement (*lian* 煉), awakening (*wu* 悟), and transformation (*hua* 化). May they lead to deeper connectedness (*tong* 通) and in the end a return to the Source (*guigen* 歸根).

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