

Exploring and blueprinting the collaboratory methodology: Research, observation and documentation strategy and rationale

LIFT's main aim is to conduct an in-depth exploration and evaluation of the collaboratory methodology in action in order to describe and blueprint it as a facilitation tool that others can use in changing contexts and settings.

Therefore, our explorative and analytical fieldwork has to focus on **two main, interrelated variables**:
A) context and
B) facilitation.

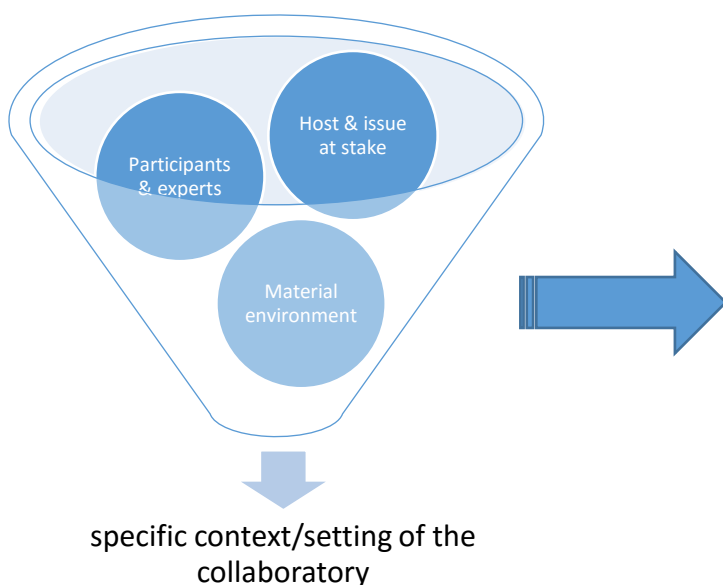
The **main research question** is:

How does context affect facilitation? In other words: How can and should facilitation be designed differently as contexts differ (in terms of available time, space, number and type of participants, topic at stake etc.) in order for a collaboratory to achieve optimal results?

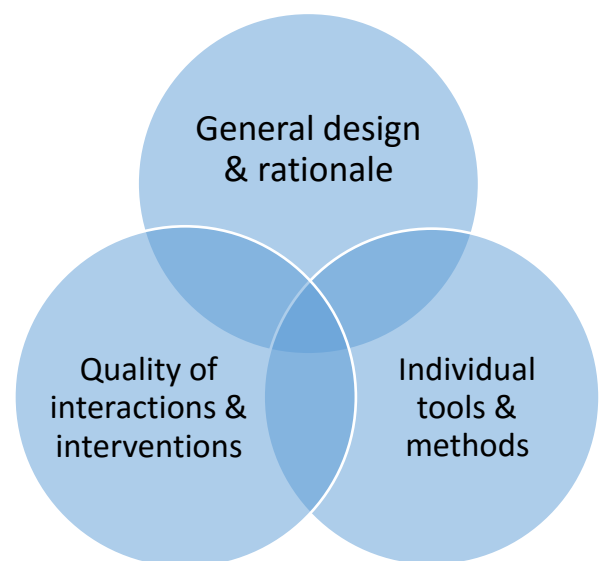
Both **context** and **facilitation** are each in themselves complex variables, i.e. systems of interrelated variables which need to be explored in more depth in order to grasp all relevant elements which prove to have an effect on an optimal facilitation design and result.

In a nutshell, they consist of the following aspects, dimensions and elements (to be complemented):

Context:



Facilitation:



A) Context variables to be taken into consideration:

1. **The hosting organization and the issue at stake:**
 - What is the issue at stake? How general/specific is it?
 - Who owns the topic at stake?
 - What is the burning question in need to be addressed?
 - What is the host's position in relation to the topic/issue at stake and existing networks around it?
2. **The participants:**
 - Which stakeholders and experts are available around the topic? What is their discursive position within the field in question?
 - Number, age, gender, etc. of "regular" participants...
 - Background, familiarity with the topic and methodology
 - Existing networks between participants and the hosting organization
3. **The material environment:**
 - The physical setting: location, venue, interior design (and its changes)
 - The temporal setting: available time (chunks/slots), is the workshop part of a larger event?
 - Available materials and tools on site
 - Other aspects

B) Facilitation variables to be considered based on the specific contextual setting:

1. **Facilitation design and rationale** (can be investigated via internal reflections and interviews):
 - Why did the facilitators chose certain elements and tools when preparing the collaboratory?
 - How did they combine those tools and build them into the design in a specific way?
 - How did they evaluate which context factors were important to be considered in this regard?
2. **Quality of interactions and interventions** (relational aspects) during the collaboratory:
 - Interactional dimensions: how did specific interventions of the facilitators generate specific dynamics within the group and shape the process in a certain way? (observation field notes by participant observers)
 - What is the perspective of the participants on this? (interview participants)
 - What is the perspective of the facilitators on this? (interview facilitators)
 - Other aspects
3. **Individual tools and methods that have been used (micro level):**
 - What was the role of the inner state of the facilitator(s); (interviews and observation)
 - Which specific methodological tools and elements have been used? How were they used, what impact did they have?
 - How can specific tools be modified and/or combined in response to differing contexts?