

LiFT Case Book

**LiFT** Leadership  
for Transition

# Hosting Collaboratories: Insights and learnings from different cases

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## 1. LiFT Collaboratory in Trondheim, February 2014

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## LiFT Collaboratory in Trondheim, February 2014

by Katrin Muff<sup>1</sup>

Using the example of a collaboratory that took place for two days in Norway, this chapter is an attempt to provide a step-by-step roadmap of how to go about co-designing and co-creating a collaboratory.

Collaboratories can take very many different shapes and forms and need to be designed, better co-designed, for the occasion each and every time afresh. I am using the two-day collaboratory on “Leadership in Transformation” which took place from February 27 to March 2, 2014 in Trondheim Norway.

The chapter is structured in a series of reflections on how to:

- Level 1: Co-design
- Level 2: Co-create

a collaboratory. We will shift back and forth between these two levels in order to simulate a real-life occurrence of such an event. We will start with Level 1 part 1, move to Level 2 part 1, spiral back to Level 1 part 2, then spiral forward to Level 2 part 2, and spiral one level back up to level 1 part 3.

**Level 1 Part 1 → Level 2 Part 1 → Level 1 Part 2 → Level 2 Part 2 → Level 1 Part 3**

### Level 1 – Co-designing the collaboratory event (part 1)

Co-design starts way before the event, a few months ahead when the group of organizing participants met to decide on the purpose of the collaboratory event. In our case, we met virtually on skype a number of times to clarify the purpose and intention of the “workshop”, who we wanted to be present and how to go about inviting them.

As an initial framing, we had decided initially that we, as a core group would meet for 4 days around the issue of “Transformative Leadership In Changing Times”. The first and the last day being reserved as our own space – to both set the stage for ourselves and the group of stakeholders that would join us for days 2 and 3 as well as to reflect on the collaboratory event and close the space afterwards.

We met again on skype approximately one month before the event to discuss how the stakeholder engagement went, how this influences the event, if and how the purpose and what each of us was engaging to do in our role of co-designing the event while at the same time wanting to be active participants.

One week before the actual event we connected again to finally set the skeleton agenda for the 2 days (see figure 1.1). As the appointed facilitator, I presented a proposal and we as a group discussed how the agenda would enable the transformative journey we all aspired to. We decided to split the collaboratory into 2 separate sections: Day 1 afternoon: downloading-dialoging-visioning- harvesting; Day 2 morning: review harvesting-prototyping, with an option to potentially re-do another short visioning exercise to start. We sent this very rough agenda to all signed- up participants so that they could start their inner and

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outer journeys to the event. At that point, we knew that we would expect roughly 25-30 participants from 7 countries.

<b>LiFT - Leadership for Transition Collaboratory 2-day session</b>		
<b>TRANSFORMATIVE LEADERSHIP IN CHANGING TIMES</b>		
Are you aiming to lead change or make progress on complex issues? Do you find a need to translate your ideas from one domain to another? Do you and your colleagues see the issues you are facing continually becoming more complex and connecting with the needs of ever wider circles of stakeholders, who themselves also struggle to find the leverage points for change?		
<b>Friday, 28 February</b>		
9am	Check-in – purpose of the 2 days	↳ a large plenum
	Reflections on leadership	↳ small teams
	Reflective walk	↳ pairs
11.30	LUNCH (45 min.)	
12.15	Collaboratory 1 – downloading & visioning	Circular setting with fishbowl
	Open space	Free
16.00	Closing for the day	
<b>Saturday, 1 March</b>		
9am	Check-in – clarification of purpose	↳ a large plenum
	Collaboratory 2 – prototyping	↳ groups
11.30	LUNCH (45 min.)	
12.15	Presentation of prototypes	↳ the plenum
	Reflective walk	↳ pairs
	Open space	Free
	Space for personal reflection	Individual
	Final reflection and closing	↳ the plenum
16.00	End of event	

Figure 1.1: The proposed skeleton agenda 1 week prior to the event

The Northern darkness greeted us as we arrived late at night from many different directions at the Trondheim airport. Our local host was most kind to pick us up and drive us to our respective hotels. The next day, ten of us met as the core group at an amazingly inspiring spot in the heart of Trondheim. We spent the morning checking in and warming up to the topic of transformative leadership. Interesting elements came up around “lazy leadership”, the tension of wanting to assure impact and the subtle inner space of lightness where change actually happens. We treated ourselves to both a lecture and a concrete application of holacracy as an emerging new organizational form which we had agreed to use as our own organizational model for the 18 months we were working together. Having a holacracy expert in our midst was too precious a gift not to explore.

Shifting into a different energy, we then stepped outside and started to prepare the space for the two-day event that would take place for the following two days with the invited stakeholders. We started first by sharing who was coming (background, perspectives, motivations as far as known) and then closed our eyes to open the space for the two-day workshop inviting the intentions and presence of all participants into this subtle space we would be co-responsible for holding. I am always fascinated by what happens

once the “space is created” and how this enables – most likely subconsciously – participants to start floating in and populating the energetic field.

We looked at the rough agenda design we had drafted a week earlier and started now to fill out the details. The afternoon of day 1 was the heart of the event with a visioning exercise that would call upon the emergent future to inspire us with new insights we would then transform into prototypes on day two. For this it was critical to ask the precisely right question for the collaboratory theme. After much debate and word-smithing (this is critical and deserves all the time in the world) we settled on “In these coming times, what kind of a leader am I called to be?” From this central question, we worked backwards to define the preparatory stages we considered to be important for all participants to go through in order to be ready to answer this question in the afternoon of day one. For this, we needed to define:

- a. The check-in question
- b. The question for the small group reflection on transformative leadership
- c. The question for the reflective walk right before lunch

Not surprisingly, we spent most of the time defining what was needed to set up the space both physically and metaphorically in the opening moments. We sorted out both logistical as well as contextual framework information and most importantly how we wanted all stakeholders to check-in. We shifted from the initial proposal of “How do you come here?” (a classic) to “What wants to move now?” This question is to be introduced with the remark that we were all moved to come here for one reason or another and that we invited everybody to share “what wants to move now” for them. We had somebody assigned to decorate the center of the circle of the check-in by bringing a tissue and a few items of different texture, placed on this tissue.

The other two questions (see bullets above) derived from the check-in as we decided to focus all stakeholders on clarifying where they were themselves – personally and individually – in terms of transformative leadership.

For the question for the small group reflection (see above b), I borrowed a set of questions used by Andrew Dyckhoff: we invited the groups to first individually reflect on and then share the following questions: In terms of transformative leadership, what is 1) my remembered self (what am I proud of)? 2) my reflected self (what do others say about me)? 3) my current programming (what are my beliefs and assumptions about myself)? and 4) my aspirational future self (what kind of leader would I like to be)?

For the reflective walk questions (see above c), I suggested that pairs of two who haven’t yet worked together would further digested and developed this set of questions by looking at: what could I a) stop doing, b) continue doing and c) start to do.

The organization of the collaboratory required three preparatory actions:

- a) Deciding together who the initiating “experts” in the fishbowl would be – e.g. would we draw them from our core group or would we invite key participants. We decided on two of each based on the desire that we wanted as much diversity and contrasts in the discussion right up front. We agreed on who would approach the two participants and we also had two back-up volunteers in case the two “externals” didn’t want to be “experts”.
- b) Determining the 4 volunteer note-takers for the harvesting after the visioning process and clarifying among them how they would smoothly take notes by defining a rotation mode.

- c) Writing the visioning journey: given that we had now agreed on what we wanted to achieve in the collaboratory, I took on the task to develop the storyline for the meditative visioning journey for the group. I let this sink in for a few hours and ended up finalizing the story late that first night. As I consider developing such storylines as the most sensitive part in facilitating a collaboratory, I add here as an example the exact notes of the storyline (see figure 1.1).

The only thing left to consider was the open space after the collaboratory. Well, an open space is an open space and all I brought to that in preparation was an idea of what could be proposed. But, open spaces follow the law of two feet (everybody goes where the energy leads you) and so this cannot be prepared much in advance.

### **Level 2 – Co-create the collaboratory event (part 1)**

Luckily, I had checked on the room the night before the event – everything we had asked for had been forgotten and I needed to inspire the night guard to help remove all tables, search for the 4 flipcharts and find all the chairs we needed for the circle of chairs. At least I could sleep well, knowing that the next day, we would find the place as we expected it.

We started at 9am sharp with the introductions as planned. What I added in addition was an explicit description of my role as a facilitator and the disclosure that I would add “editorials” here and there during the process to offer transparency of what my moves and considerations as a facilitator were. I did this, because many participants had a keen interest in further developing their own facilitation skills. I clarified my facilitator role by explaining that I was of Swiss-German origin and that our people were not gifted with a sense of humor (which of course got everybody to laugh and relax). I made this cultural reference as the large majority of the group were Scandinavians and since I had no experience in how to relate to Scandinavians in terms of their cultural programming and frame of reference. I told them that the Germanic tribe was known to be very direct and straight-forward and that I could be known to come across harsh in some of my interventions. I explained that my intention in my interventions would be to differentiate between activities that held back the process and those that would help advance the process, and that I would try to prevent the former and encourage the later. I also said that I was not a flawless facilitator and that I didn’t always manage to make this distinction correctly and that I would do my best to own up to my mistakes. I added, that they could be just as harsh and direct with me, if they felt the need. The resulting effect was a great relief and sense of relaxation in the room. The rules of play were clear.

The check-in was amazing and took a full hour. The center piece arrangement with the handful of small items (a seashell, a rock, a small pig, a globe) significantly contributed as participants often related their choice of their object to what they had to say. We invited everybody to share on “what wants to move now” . What was revealed was highly inspiring and revealing and set the tone for the rest of the event.

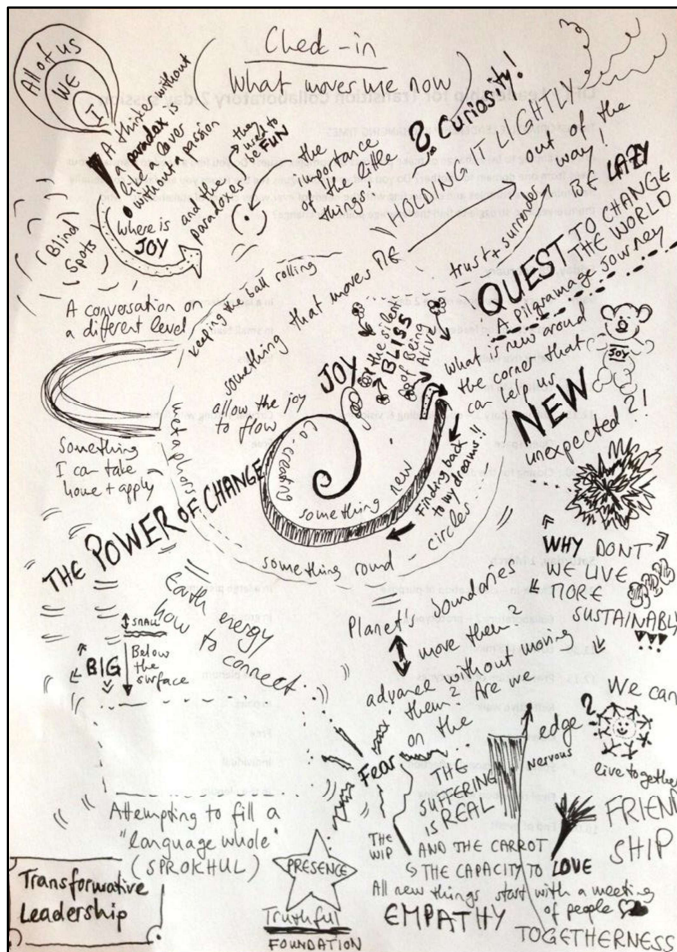


Figure 1.2: Day 1 check-in on "what wants to move now?"

After the check-in and the small 10 min. intervention, we were left with just 1 hour before lunch, which felt a bit short for the two exercises we had still planned to do. The group, however, was in a great spot and I figured that if I manage to ensure everybody was mindful about their time and how their actions would impact their small groups, a tight timeframe could still allow enough space for everything. Rather than 1.5h hours, we had 40 min. for the first small group exercise and 20 min. for the reflective walk (see phase 1 above for the related questions). We quickly established both the groups and the buddies for the pair-walk and got them to self-manage their break and start of the group work. After half-time, the individual part was completed leaving 20 min. for sharing. I briefed them for the pair-walk and reminded them where to find lunch and when to be back. The discussions at lunch were both animated and deep.

In the afternoon we launched right into the collaboratory (see exhibit 1.1) for which I quickly explained the context (50+20) and the rules:

- The experts in the inner circle (fishbowl) would start off with their individual positions and an exchange among themselves
- Thereafter, everybody in the outer circle was encouraged to replace the experts in the inner circle by tapping on their shoulders or using the one empty chair
- The talking stick would moderate by sitting in the middle of the inner circle and that whoever held the talking stick could not be interrupted for as long as he/she held the talking stick

Interestingly, we had an inconsistency between the powerpoint slide which showed still the original collaboratory purpose questions ("How does each of us (how do I) develop our transformative leadership

potential?") and the flipchart which showed the questions we had developed the previous day ("In these coming times, what kind of a leader am I called to be?"). We needed to explain that the former was meant to guide the initial discussion while the latter would be the question we wanted to be answered by the end of the collaboratory. I failed to use this occasion to uncover a moment of improvisation. At that moment, I wanted to get going.



**Exhibit 1.1:** Collaboratory setting with inner circle (fishbowl)

Interestingly, our "transformative leadership in changing times" topic brought up little to no controversy and the energy in both circles was slow and deep, to the point that 2 people on the outside either mediated or fell asleep (?). I was wondering if I should intervene by drawing everybody's attention to the energy and empowering them to influence this. Not 20 seconds after my reflection, one of participants who had shown signs of impatience got up and moved into the inner circle. Within 2 minutes, 2 more high energy participants followed shifting the energy to a productive and simulating level. Most impressive in this "downloading phase" was how the energy shifted to include the emotional level. One of the participants made a very personal and emotional statement, which another participant acknowledged and recognized. The air changed and the entire room shifted.

The visioning (see figure 1.3 below) and the harvesting that followed went as planned. As it turned out, the harvesting contained a lot of controversy and mixed messages (see exhibit 1.2). I was confused not being able to come up with a summary picture. Rather than taking the time to tell the story that resulted from the harvesting, I let everybody go to a 15 minute break. We continued with a 10 minute personal reflection whereby I invited everybody to come up with emerging prototype ideas that people could develop for an hour in the open space. Seven ideas were put forward and there was much energy in the open space hour and around these ideas before we closed at 4pm.

I am now going to take you on a visioning journey and I am asking you to trust me for these 5-7 minutes this journey takes. Respect the process by staying in your seat and not leaving the room. I promise I will bring you all right back here again at the end (smile).

Please put both feet on the ground and sit comfortably in your chair, putting whatever you have in your hands on the floor. It often helps to close your eyes during this process, it helps you to see better.

We have talked a lot about transformative leadership and I invite you now to connect to your body more fully. Take a deep breath and follow your breath within your body (pause).

Let's explore where in your body you connect to transformative leadership:

- Where do you feel something when you "set direction"
- What happens in your body when you "build commitment"
- When you "create alignment" where do you sense something in your body
- When you "support initiatives" what moves in your body and where
- How does your body feel when you "develop a coalition"

How does that feel? What happens when you interconnect all these different spots and spaces? How do you experience this sensation within you? Now, imagine that you had a volume knob that you could turn on full blast – how would that feel? Take a deep breath and let this sensation expand and grow.

Feeling fully in your body grounded and connected, you as a human being the link between the earth on which you stand and which grounds you and the sky and heaven above you that is full of insight and inspiration. Imagine you could feel that connection that you are between these spaces.

Now, imagine the world in which you live and belong, and how it is evolving:

- The increasing volatility in everything
- The increasing speed, and information flow
- The overlapping and contradicting demands
- The external forces, the cracklings of the old systems
- The sprouts of new emerging hope
- The innovative solutions, the breakthroughs
- The tensions, the confusion, the choices, the loss of orientation

(pause) Take a deep breath and re-connect to your earlier bodily sensation.

Who can you be in this world – what is calling you? What happens when you connect this inner sense of self and of what leadership feels like. In your body. How does the world react and respond to you? What images appear? What sounds? What words? How do people look at you? Interact with you? (long pause). What roles do you play? What opportunities emerge? What do you hear, see, smell, sense? (long pause).

Take a deep breath and wiggle your fingers and toes, and come back to the "Here and Now". Do it in your own time. Open your eyes. Welcome back!

**Note:** obviously reading this storyline is weird – the experience of the inner journey needs to be lived and cannot be simulated by reading a dry storyline. This example is provided for those who are struggling to come up with such stories. Chapter 15 (Students leading collaboratories) shows another more readily adapted example of such a storyline.

**Figure 1.3:** Storyline developed for the visioning process

### Level 1 – Co-designing the collaboratory event (part 2)

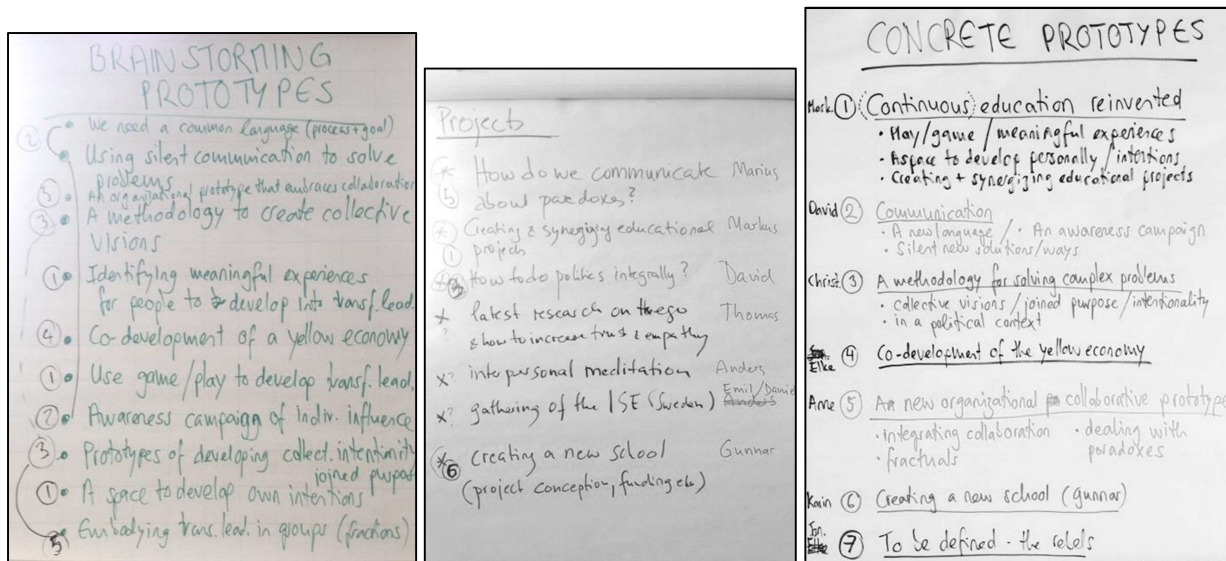
Our core group met at the end of day 1 to reflect on how to continue on day 2. We debated if or not we should start with another visioning exercise in the morning of day 2 or if we should simply continue with







person. After 1.5 hour of intense team-work, the results were most impressive and astounding. Most teams had developed a series of next action steps and even the rebel group surprised us with a most concrete and highly relevant project with clear action goals and accountabilities.



**Exhibit 1.4:** The challenge of combining emerging brainstorming prototypes and previous-day open space projects

After a 30 min. reflection walk where participants were invited to select somebody they hadn't yet connected with and share their personal learnings and take-away from the course, we were ready for the final debriefing and closing round. We had prepared also a survey where we collected feedback of participants about the effectiveness of our proposed process and journey. And at 4pm sharp, we ended two intense days around transformative leadership in changing times – with still a bit of time for a long walk up to the local castle before the sun set quickly in the North of Europe.

### Level 1 – Co-designing the collaboratory event (part 3)

On day 4, our core team met to review and reflect on the two-day workshop. Key learnings in a nutshell:

#### General:

- The way we run the collaboratory, there was too much pressure on the lead facilitator
- The topic was too generic and insufficiently specific to generate very powerful results. There are many ways we could have better dealt with this: a) to provide that clarity upfront by being very specific about the invitation, b) by harvesting the perspectives & expectations at the beginning of the workshop and then developing strategies addressing key challenges, c) using the entire workshop to work out the clarity of the question and create powerful learning experiences in the process
- We were unsure if we could expect the participants to be as open as they were in future events?
- Reflecting outside of the space of the workshop – eg visiting a museum – was most useful
- The way we issued the invitation was too general and broad, leading to very divergent expectations of participants

**Process & design specific feedback:**

- It would have been good to have more formal time to meet and exchange among the many participants
- There was a hunger for more formal input / inspiration / insight / resources (documentation) about the topic – in a situation where the topic is more specific this would happen naturally
- It would be interesting to have a track where the methodology and process were discussed (further developing the “editorials” introduced during the session – a very useful idea). At the same point, there was a question to what degree it was helpful or confusing to invite participants into such a multi-level “nested” space. This issue arose for us due to the fact that the core group wanted to understand the methodology (and was still hungry for more).
- We understood that there were different elements of the “editorials”: a) meta-level comments, b) comments about the methodology, c) facilitation-related comments, d) comments about our core-team reflections about the process. It would be worth to decide which of these are smart to share when and how and which of these are not necessarily constructive to share.

A question we were left with was, whether the collaboratory methodology was actually fit to advance more meta-level, unspecific issues. Most successful applications of the collaboratory so far were addressing at complex, but concrete multi-stakeholder issues. Given that the Trondheim collaboratory-workshop was one of the first events dealing with a very broad, unspecific topic such as “Transformative Leadership In Changing Times”, our core group’s reflections were inconclusive. The prevailing feeling was that even though not perfect, the collaboratory did produce serious, important and relevant results. And nobody was aware of a methodology that could have produced better results. Our host finally concluded: It was very worthwhile to prototype a sequence of improvements of this methodology in the context of being delighted to have a “clumsy solution for a wicked problem”.

To be experienced, lived and enjoyed!