

LiFT Case Book

LiFT Leadership
for Transition

Hosting Collaboratories: Insights and learnings from different cases

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8. The LiFT summer school of 2018: The co-created Collaboratory

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The LiFT summer school of 2018

Looking beyond barriers – presenting the co-created Collaboratory

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A. Introduction

This chapter will serve as a report for the Leadership for Transition (hereby referred to as LiFT) summer school held in Vienna 2018. After five years of harvesting experiences from facilitating various collaboratories, the project had set the stage for sharing their knowledge through a facilitator training course with the purpose of spreading the benefits of this specific methodological approach. The approach itself mainly derives from applying the core insights from Otto Scharmer's (2007) *Theory U* and translating them into a methodology. The meaning and history behind the term "Collaboratory" also stems from an early application of Theory U to complex societal challenges by the working group of the World Council of Business Schools for Sustainable Business (Muff, 2013). Katrin Muff introduced the Collaboratory to the LiFT project in the fall of 2013, when it was picked up and further explored.

This report is written by two external observers and is first and foremost a documentation of the summer school and facilitator training with the purpose of showcasing the happenings of the course. Additionally, we have prioritized to summarize a reflective analysis on the observed educational approach as it was requested from the LiFT team. In giving some pointers in how we observed the pedagogy, we aim to give informal insights to our readers as well as presenting useful data for improving the quality when actualizing future facilitation trainings. The first part will introduce the summer school with its purpose, approach and content as presented by the LiFT team itself. Part II is divided into four different sections and will reveal the descriptive narrative of the summer school held in Vienna. An analysis of the line of pedagogy and educational approach from our observations will be given in part III, before we conclude with a summary of this chapter.

1. LiFT summer school - purpose, approach and contents

In times of rapid change where individuals, groups and whole societies find themselves in highly complex situations characterized by great interconnectedness, our world is in tremendous need for cooperative solutions that make way for sustainable systems to succeed and take root. Experiences from previously held collaboratories have shown that this methodological approach is well suited for finding solutions to complex issues based on the interests and needs of a multi-stakeholder group (Muff, 2014), tapping into the collective mind of the participants.

According to the LiFT website and the invitation sheet for the facilitator training course, the summer school aimed to provide participants with "important skills for hosting, designing and facilitating co-creative stakeholder engagement processes" (LiFT, 2018). A Collaboratory is an integrative approach with an extensive range of possible applications in various contexts. The approach is therefore, similar to others facilitation methods, most successful when it is customized to the specific context and setting. With this in mind, the summer school offered participants insights and skills for designing, hosting

and facilitating co-creation processes with the purpose of exploiting the mechanics of the methodological approach to meet their current circumstances.

The summer school was presented as a train-the-trainer course that covers knowledge of the foundations in which the specific integral leadership style is grounded, knowledge about design and how to adapt to contextual challenges while using typical exercises in other settings. Guidance with facilitation and about ongoing implementations, typical challenges, including the harvesting and documentation of experiences were among the major gains of participating in such a course. The training focused on reflective practice with a strong emphasis on experiential learning in a community of practice. It aimed to "... stimulate awareness of the multiple dimensions of hosting conversations, of holding space in respect of human diversity and of facilitating beyond words."¹

The LiFT Summer school 2018 was conducted in cooperation with COMMIT (Vienna) and constituted the first part of COMMIT's EDUTOPIA Summer Academy. However, this report will only cover the data gathered from the first part of the academy, the LiFT summer school itself.²

The summer school 2018 lasted for five days, but as you can see in the chart below, the facilitator training included an online preparatory training that was held in the period between April and June, 2018. All communication throughout the course except when the group was physically gathered in Vienna, was organized through the learning platform Eliademy (this includes webinars, discussions, preparational readings, reflections and documentation).

The content of the summer school was offered in four different phases:

| | <i>Content</i> | <i>Date (2018)</i> |
|----|--|---------------------------|
| 1. | Online preparatory training | April - June |
| 2. | Co-designing - Two days of guided preparation on how to organize and facilitate a | 2. & 3. July |
| 3. | Collaboratory | |
| 4. | Co-facilitating - Two days of application in real life setting, conducting a public Col- | 4. & 5. July |
| | laboratory | |
| | One day of debriefing & harvesting learnings through reflection | 6. July |

2. Descriptive narrative about the LiFT summer school

This part intends on giving the reader an overview of the activities that happened during the summer school. We will divide this part into four different sections as shown in the chart above. Each phase will be described in a chronological order with a few chosen aspects presented in more detail. A time schedule of the course is provided in the appendix. In addition to the main narrative, we have supplied text boxes reflecting upon some of the topics we have described. It is important to note that we did not participate in any of the online preparatory training calls as presented in the first phase. Rather,

¹ From the "Facilitator training" tab (http://leadership-for-transition.eu/?page_id=459).

² The Edutopia Summer Academy started as a collaboration between COMMIT and Business school Lausanne (BSL) to foster next generation change agents to tackle the great challenges of our modern world. Focusing on developing new models of university education, they were seen as a great partner for the LiFT project and the facilitator training course (<https://www.edutopia-vienna.org/>).
<http://leadership-for-transition.eu/>

this report is based on materials from this phase gathered from the learning platform, Eliademy.

Online preparatory training

Below is the schedule for the online meetings, each set to last for two full hours. Each meeting was held two times because of the number of participants and to allow for better accommodating everyone's needs and agendas:

| Description | | Dates (2018) |
|-----------------------------------|---|-------------------------|
| 1st online meeting (2 hours) | Introduction; purpose and goals | 18.4 // 22.4 |
| 2nd online meeting (2 hours) | How to prepare a Collaboratory Background and key learnings from different contexts | 9.5 // 13.5 |
| 3rd online meeting (2 hours) | How to best design a Collaboratory to fit the specific needs of the given hosting context; setting and stakeholder constellation, meeting the local host. | 30.5 // 3.6 |
| Process design call (optional) | Process design and high level drafts for the upcoming Collaboratory | 17.6 |
| 4th online meeting (2 hours) | Reviewing and revising design details. | 24.6// 27.6 |

After registering, the participants were given introduction materials, together with the access to Eliademy. This included an overview of the Collaboratory with its general structure, strategy and rationale as presented in the first chapter of the LiFT Methodology Book - along with background readings about the Collaboratory written by Elke Fein and Katrin Muff. For the 1st online session, the participants were assigned to read literature about integral leadership (Reams, 2005), how to co-create a Collaboratory (Muff, 2014) and submitting one question and one reflection/comment about the key readings in a discussion forum afterwards.

The first online meeting was about familiarizing the participants with the LiFT project, the facilitator training course, and basic aspects of the Collaboratory as a methodological approach (exhibiting goals, contents, expectations, purposes and so forth).

The second online meeting was intended to delve deeper into the method, presenting some of the project's most important learnings in view of to how to prepare a Collaboratory, as well as an opportunity to meet and ask questions to the local event host and topic owner, Christiane Seuchs-Schoeller. Prior to this session, the participants were given different case studies from previously held Collaboratories to read up on.

Assignment groups

The assignment groups worked as an effective tool for engaging the participants early in the process, activating them in making choices about which topics and which elements of the facilitation design they wanted to work on in more detail.

From this point on, it became clear how the participants were conducted to get involved in the process of making personal decisions regarding the event.

In the third online training module, the course participants were to focus on how a Collaboratory can be designed to fit the specific needs of the context. Preparing for this, the participants were given materials focusing directly on challenges that need to be accounted for in designing and facilitating the process including ways to impact different levels of depth in transformative systems. Based on the specific contextual setting for the event in Vienna, the participants started to initiate and expand their focus towards their own co-creation of a Collaboratory during this session. Prior to this meeting, the participants selected specific areas of the design and facilitation work to focus on, and organized into different subgroups on this basis. Throughout this chapter, we will refer to these subgroups as assignment groups.

Between the 3rd and 4th mandatory online meetings, the LiFT team arranged an optional, additional video conference about process design for those who were interested. Prior to this, the participants were challenged in making their own individual high-level draft for the Collaboratory event which the groups were to talk about and reflect upon. To help the participants get going, they got the opportunity to interview five different stakeholders that were set to join the Collaboratory in Vienna.

The fourth meeting primarily revolved around taking the existing state of design ideas, reviewing them to reflect on why specific ideas and choices were made, and to then make refinements on the basis of this. As well, preparations for meeting face to face were made.

This short overview shows that a great part of the work that happened during the actual summer school in Vienna was based on the preparatory actions that had been taken prior to the event itself.

Before and between each online meeting, the participants got a variety of assignments and background readings to dip into as homework – engaging them in the process of co-designing and co-creating a facilitation process to explore sustainable options for the future. However, there seemed to be great divergence within the group of participants regarding how engaged and motivated they were during the preparatory sessions, which can further explain some of the group dynamics that happened throughout the course. Still, the online preparations were aimed to give the course attendants a basic introduction to the concepts, processes and methods. The most significant learning was yet to happen during the two preparation days in Vienna, when time pressure, physical presence and the immediacy of the context and setting would enable more of the specific design work and planning. Throughout the preparatory training, the participants were invited to familiarize themselves with the LiFT project, with the methodological approach, as well as getting familiar with each other and the facilitating LiFT team, making them more accessible for the deeper layers of learnings to occur. On this basis, the participants of the facilitation training met up in Vienna on July 2nd for the LiFT Summer School 2018.

B. Co-designing – Two days of guided preparations on how to organize and facilitate a Collaboratory

Day 1

The LiFT summer school 2018 started at the Schottenfeldcenter in the 7th district in Vienna, Monday, July 2nd. The team had hoped to be able to use the same location throughout the whole week of the facilitation training, but unfortunately the Vienna Impact Hub did not have the capacity to accommodate our group on the very first day. This led our host for the event, Christiane Seuhs-Schoeller, to book a small conference venue approximately 200m from the Impact Hub for Monday, July 2nd. Schottenfeldcenter had the same environmental vibe as the Hub. For the sake of resembling the surroundings for the upcoming week, it was found purposeful to prepare the participants with the bodily and cognitive moods that are associated with these kinds of circumstances. Once we entered the venue, we were welcomed in an open café-like space in a rectangular shape. Big windows accompanied with a high ceiling gave the room an open atmosphere, filling the space with lots of natural daylight. The floor was covered with light and dark shaded square tiles and the walls were white in color. To the back wall of the entrance, there was a small counter serving cold drinks including coffee and tea. Around the room, there was a blended mix of standing tables, coffee tables with regular chairs and even some sofas against the one wall. It is important to note that all elements had some space in between, so people could move smoothly around the area. These surroundings gave the impression of a well designated location to mingle, and it played a part in how the chatter between all parties created a lively and exciting atmosphere for kicking off the event.

A while into the meet and greet process, and when the facilitating LiFT members had set up the conference room, a smooth melodic tone filled the room. It was Elke Fein who started clinking two Tibetan bells together signaling a phase of transition. From that moment, every transition after a small break throughout the week was going to be perturbed with the sound of that tone. With the melodic resonance created between two Tibetan bells, the LiFT Summer School 2018 was officially about to get started.



All entrants of the program were escorted into another room in the back of the area to the left of the already mentioned counter desk. This room was set to be the conference room for this first day. It served its purpose, albeit the acoustics made it somewhat difficult to hear those with a gentle voice. This room was also rectangular shaped and turned out to be a bit small for our requirements regarding our group needs for sitting in circles.

Conversations in one big plenary circle

One reason for sitting in perfect circles while having conversations is that everyone is able to see each other. This will possibly benefit the speaker and all listeners with creating a holding environment through a deeper emotive contact.

All attending participants, both trainees and representatives of the LiFT team, started sitting in a (nearly) perfect circle with the LiFT facilitators welcoming everyone. Afterwards, everyone was encouraged to check in with the whole group by giving two statements in plenary; one about current feelings and one about their own expectations for the week.



Preparing the Main Conference room at the Impact Hub for a plenary meeting later that week

Continuing the phase of establishing contact, the LiFT facilitators invited the participants to go on with a round of “speed dating”. Here, everyone had a quick personal chat with another person for two minutes and then rotated to a new person. Impressions of the emotional atmosphere up until- and including this exercise, was a mixture of curiosity and happiness, with a hint of nervous anticipation – wondering about what this week was going to be like. Following this, the participants then moved on to gathering in their designated assignment groups to establish their agenda and purpose.

Assignment groups

- ❖ Opening & closing
- ❖ Fishbowl & dialogue
- ❖ Visioning
- ❖ Prototyping & open space
- ❖ Observation & documentation

After some back and forth, with participants finding their pre-determined assignment group and where some found themselves a new group, everyone seemed to be in the right place. By everyone to be in the right place, we mean that everyone was comfortable enough to be where they were, knowing that anyone could stand up and step out of their role at any given time.

For the following sequences during the first day, the facilitators supplied the groups with two initial questions:

- (1) What do we know, and
- (2) what do we need to know.

From an observing point of view, the two questions worked as intended in at least two different ways; it did let alignment between group members happen in a constructive way towards their assignment as a group. Also, the questions contributed to a common understanding between all participants during the summary in the following phase. In other words, the two questions worked remarkably well as a support for facilitation in different systemic levels.

First, it created alignment between individuals in common assignment groups, then all the groups got synchronized further as a whole system. As the assignment groups shared their thoughts in the whole group, LiFT facilitators Jonathan Reams, Elke Fein and Bettina Geiken, were keeping track on the topics from each group, both by creating a bulletin board of handwritten key words and emerging questions on post-it notes, as well as by giving follow-up questions for further stimulating the learning process. Then, it was time for a lunch break.

This first day of the summer school was the only time during the week that the whole group went out from the designated venue having lunch. On all of the other days, there was catered food at the Hub. Overall, the food was impressively tasty in a vegan fashion throughout the event. The choice of serving <http://leadership-for-transition.eu/>

vegan food supported the main theme of sustainability, as well as serving the needs of attendants who were vegans, giving the summer school event a holistic expression.

Coming back after the break, the group continued its process towards their aim of successfully organizing and hosting a Collaboratory. First, there was a brief continuation of the work before the lunch break with clarifying assignments between groups in the large circle. For the last section of the day, time was being invested in guiding the participants through a mock Collaboratory.

The participants' previous experiences in leading facilitation processes in general and their familiarity with the specific Collaboratory method varied greatly in extent. The large group of participants consisted of students or young adults who just had finished their degrees, young adults within organizations working towards sustainability and social development, and others having experience and interest in conscious living. Some participants had been part of one or more of the events hosted by the LiFT project at earlier stages and therefore had been part of a previously held Collaboratory event.

The mock Collaboratory

The mock Collaboratory was not just a great approach for introducing the method to the people who weren't that familiar with it, it also served a greater purpose as all participants got a hand-to-hand experience of how to co-design and co-facilitate a Collaboratory while it happened.

This implies that a great portion of the participants had never experienced a Collaboratory before – except through understandings created from the preparatory readings and online meetings. It is safe to say that a run through a mock Collaboratory was a clever move to introduce the participants to the method and where the more experienced Jonathan Reams and Elke Fein shed some light on the facilitation perspective of the process. Also, having this design during the final part of the day was a well-executed approach as the assignment groups had already gotten together with sharing ideas. Now was the time to check out these ideas in a first draft, giving opportunities for the participants to evaluate their ideas and to get reasonable feedback to their understandings.

The first format that was tried was a Fishbowl, facilitated by Jonathan Reams. The guiding question of this session was: **"What does it need to conduct a good Collaboratory?"**

After this, the large group split into several groups of three and four people going into the dialogue phase of sharing individual reflections in small groups. Afterwards, the groups ventured into a conversation in the plenary about the topic. It is important to note that the ongoing creation of bulletin boards was still happening during the phases where the whole group was present.



Course participants experimenting with the concept of the Fishbowl on day one.

With the whole group being present, we mean that all individuals within the group were paying attention to a common locality, contributing to the same topic. Following the reflections from the dialogue phase, a round-up of the day and information about the next day were given. To conclude the first day of summer school, the participants were invited to join a guided meditation with the purpose of visualizing and identifying their own role within the group.

Bulletin boards

When being in a group conversation with the intention of planning and organizing something, we would claim that the cognitive skills of the participants are usually highly favored.

Creating bulletin boards is also a way of harvesting key ideas from the group which includes capturing arising questions that need to be taken into account at a later stage. This can be compared to the creation of a summary from meetings of any kind. Yet, regular summaries don't necessarily focus on future possibilities. In contrast, creating bulletin boards is oriented both at the present and at the future. In some sense, it can be compared to having a graphic designer recording the event with inspirational sketches. Therefore, we believe that having a person writing down highlights of the conversation on colored paper, adjusted by categories, and seeing the paper sheets being hung up in understandable patterns can also be stimulating for participants in several ways beyond mere cognition, including their intuition. It thus invites and includes broader parts of what every attendant brings into the process, exciting their senses and creativity.

By highlighting important captions from the emerging group space, the facilitators are holding the space for the ideas captured on the board, while aligning understandings and signaling which aspects of the conversation have the potential to be focal points for the group process.

Day 2

On Tuesday, the 3rd of July, a very warm day in Vienna, the participants of the LiFT Facilitation Training met up at the location of the upcoming public event, the Impact Hub. In the community's own words, the Impact Hub Vienna is "located in the beautiful 7th district at the heart of Vienna". The network operating the hub sees itself as a "unique ecosystem of resources, inspiration, and collaboration opportunities that supports the development of a more sustainable world" – clearly a well suited venue for hosting an event supported by the LiFT project. The location induced creative vibes in urban circumstances, aligning our needs with the interests of the invited stakeholders. Unfortunately for us at that time, the air conditioning was under maintenance so the indoor air quality caused some disturbance and tired minds during the week. Given the fact that there also was substantial construction work going on at the building next door over the entire week, it was pretty clear that we could have been luckier with the timing of the event. Still, these distractions happened to be circumstances that were not under the host's influence and had to be accepted as they were.

For our time at the Impact Hub, the LiFT team had arranged with a local graphic designer, Josefine Schulze, to capture the moods and highlights of the process that emerged throughout the week.

The second day started off with a check-in by the whole group. Every attendant was given the opportunity of relieving themselves of their own thoughts and emotions that had emerged from the previous day. The overall mood seemed somewhat positive and modest at first glance. Several attendees gave impressions of being curious of how the following day would occur and if the group would be done with sorting out their plannings for the Collaboratory within the time limit. Some participants shared

experiences of restlessness, apprehensiveness and jitteriness that they had felt during the first day. It feels convenient to say that the tension in the group was high at first, but the facilitators did a good job at the very start with containing the space and releasing the present anxiety within the group.



Our graphic designer, Josefine, here pictured with the two of us, helping out with hanging up the poster for the Collaboratory event

The way this happened was that some of the facilitators admitted feeling anxious themselves during the previous day. The term chaos was used to describe how complicated it is to organize an event with this many people having to work together in a self-organizing way. With this, the facilitators leveled themselves with the participants and emphasized with their needs, signaling that there is no need to worry, “let’s trust the process with nature working things out” – creating a sufficient holding environment, so that the participants could let themselves grow further into the process of creating their own Collaboratory. This could be seen as a causation of how the participants took the opportunity to share vulnerable experiences that morning. This resulted in several occasions portrayed with a considerable amount of laughter during that sequence, a laughter we believe could be explained by the releasing tensions.

After a brief rundown of the aims and agenda for the present day, the participants moved into the assignment groups to start with their detailed plans. Continuing from the first day where they finished up with a visioning sequence of finding their own role in the group, the participants seemed to be more comfortable within the space during the second day. One could argue that this is a natural process in group dynamics in general, but it is still a relevant aspect of the group process that needs to be mentioned when talking about how this group evolved during the event. As the day went by, the interplay between participants in all group combinations seemed to emerge in a natural, self-organizing way. People who felt like it and were ready for it, took the roles with more responsibility. We could partially explain this group dynamic based on the experience and age of the participants. But then again, this explanation has a varying degree of reliability as we observed substantial deviations in both camps of age and experience regarding the emerging roles of the individual participants within

Reflection on the opening phase

When does an event actually begin? Does it in- or exclude the informal welcoming and opening phase?

To ensure an alignment of understandings between the host and the arriving guests, we suggest to give clear indications as to at what time the official opening takes place.

the summer school.

Between the check-in and lunchtime on the second day, there was a logistics meeting where every assignment group was represented with one person including Bettina Geiken from the LiFT team, our host Christiane Seuhs-Schöller, and one representative from the venue (Impact Hub Vienna). Ahead of this meeting, every group had gotten the task of planning the types and amounts of materials which were needed to implement “their” different phases of the Collaboratory. Experiences from the logistics meetings suggested that it is very important to have all details worked out before going into such a conversation. It is easy to take small things for granted – like tiny materials, timing and tasks that are needed for things to work as smoothly as possible.

This meeting was also the one and only time the representative from the venue got to know about the design plans. By these means, it was not only essential for knowing which materials we needed; it became very important to have all the organizing details ready to confirm that it was doable within the space we were given. The Impact Hub is an incubator for people doing work related matters, and the LiFT summer school involvement was not the only occurrence operating on the site at that time. In consultation with the representative from the Hub, the representatives from the assignment groups and the LiFT team got out of the meeting with new understandings of the upcoming event, ready to be shared with the whole group.

After the logistics meeting, every group was given a short amount of time to present their work in plenary with the intention of aligning the micro-processes planned by each small working group. Our observations gave the impression that this meeting had a positive outcome. The presented summary of the logistics meeting seemed very fruitful to many – it even got applause by the circle. Christiane Seuhs-Schöller should get the credit for this fact, making those agreements precise and clear to everyone in a surprisingly short amount of time. Afterwards, it was finally time for a much-needed lunch break as the energy level during the summary meeting had turned fairly low and unfocused (therefore the appreciation for Christiane’s prominent speech).

The co-design of the Collaboratory demanded attention and time from the participants.



After the lunch break, the groups were given some time to finish up all their details regarding the design for their designated parts of the Collaboratory. Starting the first day with the assignment groups being quite isolated from each other in a physical fashion, where each group represented their own unit, the group process had emerged to a state where the assignment groups worked more interconnected with each other and thus spread out all over the place. For us, this was an indication of how the individual participants had evolved in their roles. It could seemingly give the impression of being more chaotic at first glance, but there was undoubtedly orderly chaos. Everyone seemed to be swirling around working on their own task in a self-organized way. After the groups were done delegating roles and agreeing on their detailed structures, it was time for the whole group to assemble with the purpose of aligning the separate aspects into a complete and co-designed Collaboratory event.

The atmosphere in the room was filled with curious anticipation, the process where the participants of the summer school had co-designed their own Collaboratory would soon come to an end. There was only this last sequence of alignment for finishing the final details to be done. The assignment groups presented their timeline in a chronological order, starting with opening/closing followed by fish-bowl/dialogue, visioning, prototyping/open space and observation.

This day took approximately one hour more than anticipated (including individual tasks as shopping for materials/printing documents/making slides for presentations and so forth). At the end, after observing a variety of emotional and functional states over these last two days, all of the participants seemed calm and satisfied, excited for the days to come. It was clear to see that they were eager to get on with the task of co-facilitating the Collaboratory starting tomorrow.



A capture of the space outside the main venue, here during a break on the second day.

Day 3: Co-facilitating – Two days of application in real life setting, conducting a public Collaboratory

With the stage set, it was now time to start the event (and for some, this felt like “going down the U” in itself). The course participants showed up early to prepare the venue in a detailed manner. One

could almost touch the sense of excitement in the air before the first attendees showed up. To get things going in establishing contact with the arriving stakeholders, the summer school participants had planned out and given each other roles to make people feel welcomed and appreciated.

We observed that people seemed excited and feeling curious and happy to bond in an informal tone during the initial sequence. Parallel to this, one of the teams was making sure that everyone got registered and got to sign the GDPR declaration (handling of personal data).

After about half an hour of informal mingling, the participants were invited to the main conference room to officially start off the event. Jonathan Reams and Christiane Seuhs-Schoeller took the lead and introduced everyone to the LiFT project, the facilitation training and the specific purpose and agenda for this event. The guiding question sounded: *What needs to shift for social enterprises to unfold their fullest potential?*

The overall stage set-up could be characterized as classic theatre style, with front-facing seats organized in rows and with the utilization of a powerpoint presentation. Everyone seemed to be listening carefully. Following up on the introduction, four pre-selected experts, José, Tom, Nicolas and Bertram, were invited to share their stories. The content of their presentations all touched on some of the possibilities and barriers that affect social entrepreneurship and the people in similar start-ups. Their stories seemed to “hit home” and they each received a loud applause after sharing their talk. Before setting the stage for the Fishbowl, everyone was invited to participate in an ice breaker exercise in plenary followed up by a coffee break.



Our host Christiane Seuhs-Schoeller presenting the guiding question of the Collaboratory.

When the attendants joined in again, they were briefed on the upcoming fishbowl sequence by a course participant. The experts sat in the inner circle (four chairs, plus one empty), ready to start with their initial statements before other people were invited to join the inner circle.

The Fishbowl is situated at top of the U as the “downloading” phase (Scharmer, 2007) and is described as the phase of co-sensing. One by one, the experts shared their initial statements. All eyes and ears were drawn to the center at this point. The facilitators had been trained beforehand and briefed on interventions that could be necessary if someone did not follow “the rules of the game”. Interestingly,

the energy in the Fishbowl evolved quite fast towards a heated engagement. This was particularly catalyzed by the lack of women in the expert circle, as one of the participants who quickly grabbed the microphone when it was available, pointed out in a long and prominent speech. It was interesting for us as observers to watch this unexpected happening to unfold. One could observe that some in the facilitating team were put off by the sheer energy of the expressions and violation of the explicit rules (talking over two minutes), but yet, hesitated to act upon this in a distinct manner.

Rules of the Fishbowl

- * One person speaks at a time.
- * One can only speak from the inner circle.
- * Only speak for two minutes at a time.
- * It is possible to speak more than once.
- * Please leave the inner circle when you don't feel like contributing to the conversation anymore, so that others can enter.

This situation later was a topic of rich exploration in the group reflection afterwards. Eventually, the coffee break was announced and participants were invited to put their feedback dots onto the exit poll on the two scales:

“I feel engaged” and
“Something is shifting”,
ranging from zero to five.

One could see that the majority of the participants had left their dots in the “engaged” part of the scale with most points being put between three and five. With regard to “something is shifting”, the situation was different as the points were more spread, leading to a median between one and three. Then came the lunch break and people seemed to be continuing to discuss the experience and content from the Fishbowl, even though it was lunch time. Time went on and there was no silence to be found in the surroundings.



Tom (one of the invited experts) making his initial statement during the Fishbowl.

Calling upon the participants to enter the main venue after lunch, the second “Ice breaker” was initiated, with the group standing in a large circle. To get things going, everyone was invited to stretch open their arms and aligning them with their neighbours standing on both sides. The facilitation then continued with instructions that required quite a faster and faster pace to clap their hands in a given direction. This exercise seemed to work as intended with raising energy levels after lunch and easing up bodily tensions from the Fishbowl.

Reflections on the fishbowl

The result of this exercise depends on the participants, the framing done by the facilitators and on how the exercise is presented beforehand.

- *When the experts are given time for inspirational speeches before, is it necessary to give them a lot of time again in initializing the fishbowl?*
- *What are the ups and downs of having an active facilitator?*
- *How should the course participants be engaged in this exercise?*

As everyone was restituting from standing up, another summer school participant announced the dialogue phase as the next sequence. The structure and aim of the activity was claimed to deepen the conversational field. The practice of listening was put into a structure, where instructions given to the participants were clear: "You are to give responses by responding with questions". By the structure of groups containing four attendants (including one facilitator from the facilitation training), participants were invited to move beyond the high-temperature discussions into a different kind of conversation. One with listening attentively and responding with curiosity, quite similar to the practice from the Socratic tradition. From an observer's perspective, this marked an interesting shift in the overall intensity and atmosphere in the groups – a sense of concentrated listening. Questions were

being generated throughout the room, and the curiosity as to what was to emerge in different dialogues was intriguing for us. It almost seemed as if a shifting attention and the type of conversation led to a shift in the way people were thinking. The attendants were further challenged when groups were instructed to rotate to form new groups, giving space to broaden perspectives and to avoid over identification with current streams of attendance. This second iteration also gave another instruction as participants were asked to take two deep breaths of air before stating their questions. It had earlier been stated that the purpose was to get access to a "below the neck" conversation, where the emotional and deeper space was given attention.

The notion of the "open heart" (Scharmer, 2007) seemed to be true to us at this point, people were actually willing to listen beyond what had already been said. Time seemed to fly and suddenly there was another coffee break. The course participants were looking content and comfortable about how things were unfolding at that point. The atmosphere in the coffee break seemed to differ from the former lunch break. There was almost a kind of peace in the air, even though people were still engaged in conversations with each other, or at least it seemed so to us. It got us thinking: "Wow, this is actually working", hinting that something in the space was shifting. The day was moving on and time for the last portion of the day was closing in.

The Collaboratory moved in to the "presensing" phase, as marked by the distinctive activity termed visioning, with the main venue room rearranged for a different kind of work. Chairs and pillows were spread out across the whole space. We observed a shift in the tempo and tone on how the course participants talked and how the facilitation of instructions were put forward. As everyone settled in their proximal space, a soft voice carried on the narrative by leading everyone into a guided fantasy (something we understand as a narrative directed to stimulate the intuitive and imaginative parts of our consciousness). A question was put forth: "What does your future look and feel like?", with a long pause and space of silence put after it. We gazed into the crowd, all with closed eyes in contact with their own

Reflections on the dialog phases

- *The guideline that only allowed to ask questions seemed to work well*
- *How is it possible to measure if the impact of the techniques and exercises did work according to the intentions?*
- *If the participants of the facilitator training are joining as regular participants in the dialog phase, this should be clearly stated beforehand to avoid a confusion of roles between them and the facilitators.*

something, different from the previous phase. We thought to ourselves: “Are they connecting to something deep right now, something within the deeper layers of their (sub)consciousness?” All of this was quite interesting to be a part of, as the room was filled with serene silence.

Reflections on the visioning phase

- *How do you adjust this kind of exercise to a diverse group?*
- *What are the alternatives to a meditation exercise?*
- *Can anyone lead a guided visioning journey?*

The silence broke again with a soft voice inviting the participants out of their imaginative and sacred inner space. We wondered for ourselves: “What are they seeing? What kind of information was this atmosphere and narrative bringing forth?” The participants were then invited to capture their vision on paper, by writing, drawing or with whatever medium they felt comfortable with. After a few minutes, they were invited to share their thoughts to one another in pairs of two and then rotating to new dyadic pairs.

To us, it seemed like that this phase was exhausting in a different way than both the Fishbowl and Dialogue sections, venturing beyond mere cognitive abilities. By different, we mainly refer to the usage of the imaginary and intuitive capacities of our minds.

Exiting the room after the closing words for the day, people walked out in a quiet and thoughtful manner after putting new dots onto the second feedback poll, giving a new feel of the overall “temperature” in the room. The poll showed a slightly different picture; the first scale (“I feel engaged”) was close to the initial one (people feeling quite engaged; spread between three and five), but now with a distinctive change along the second scale (“Something is shifting”). One could now see a clear accumulation around three to four along the second scale, indicating that people were indeed noticing something shifting. With this, the first day of the Collaboratory in Vienna was manifested and drawing to its end. With the venue clear again, the course participants went back to debrief how the first day unfolded.

A very good example of how societal situations (cultural/collective forces are influencing content, as well as process in these kinds of settings occurred when one of the external participants brought up the gender equality issue. Clearly frustrated about low representation of women within the inner fishbowl circle and preceding keynote round, she made a statement about the need to represent the female in the fishbowl. This led to agitation in some of the dialog groups and ended with the person not coming back the following day. For us, this raises concerns about all the things you may have to take into account when designing these kinds of events. This

Reflections about closing day one

- *How can we summarize/wrap up the first day and inform about the next day to ensure that as many people as possible come back the following day?*

Exit polls

Initiated by the observation and documentation group, all attendants were asked to give a personal feedback on the process at three different times during the Collaboratory by sticking colored dots on two scales ranging from zero to five: “I feel engaged” and “Something is shifting”.

From the perspective of the facilitator training, this served the purpose of providing “raw material” for later reflection, capturing current moods in an effective way. However, one could question the validity of the feedback in numerous ways. Also, it is uncertain how this element of giving feedback while being in a deep process affects the latter as it happens.

We would recommend to be careful in interrupting the attendants in such a way that might pull them out of the endeavoring states of co-creation. An element like this needs to be integrated in a fluid way, following the process as a natural sequence.

unfortunate situation with this attendee being quite upset could possibly have been avoided if the participants had been told that the hosts did try to get several female experts for the event. Still, thinking of these kinds of details and making sure that similar situations do not appear should be considered as an idea – something to aim for. It is harsh to expect that something like this should never happen, but still sad when it does. The experience should therefore be used constructively in the future.

Day 4

The second and final day of the public Collaboratory started with all of the participants joining in a big circle in the main conference room at the Impact Hub. The overarching goal for the day was to “together come up the left part of the U” – going through the phases of harvesting, marketplace, open space and closing of the event. There seemed to be a certain calmness that morning as Jonathan and one of the course participants layed out the overall agenda for the day. Then, some time was given for reflection before moving on.

The group was then guided into a short meditation led by another course participant, seeking to connect with the thoughts, ideas and artifacts that had emerged from the visioning in the previous day (“going down the U”). The group seemed already more attuned to their deeper selves and was attending with a fuller presence than at the beginning of the first day. Following this meditation, the participants were then invited to organize themselves in groups of two, followed by iterations in pairs of two and then four, accompanied by one facilitator per group. This progressive exercise seemed to stimulate the stakeholders’ needs, for as the attendants were quite engaged and excited with sharing. Quite some time was given to further the visioning by coming together to create a visualization. A short break allowed the team to prepare for the next phase, and also giving room for participants to catch up and network with each other.

With this, the harvesting from the visioning phase continued, now moving on from smaller groups into bigger ones. The participants were instructed to pair up in bigger groups and to move into experimenting with co-creation. The transition was also marked by new course participants taking over the facilitation. They seemed prepared as they gave the instructions with an observable confidence. Again, the guiding question was repeated as a focal point for the exercise. The groups spread out to different locations on the venue of the Impact Hub, where practical tools for artwork such as paper, colored pencils and markers were supplied.



Going deeper to work, the participants are co-creating posters for an Art Gallery.

As we walked around the venue, we observed that most groups got into what might be characterized as a flow-state of mind (Csikszentmihalyi, 1990) relatively quickly, indicated by an intense concentration and presence in their respective activity. The groups were given a time-limit, so they needed to work effectively. But it also seemed as if some of the groups lost track of time, since the facilitators had to remind them several times that time was up. Another interesting observation we made at this point was that the various groups organized themselves differently as to how they structured the process. Not surprisingly, the open instruction and gentle facilitation encouraging creativity led to different results. The resulting posters showed different kinds of creative expression and styles of presentation – all aligned with **the big question: “What needs to shift for social enterprises to unfold their potential?”**. As everyone gathered in the main venue room again, the voice of a facilitator instructed the groups to find a space on the empty walls to stick their posters. The phase termed the “Gallery” was thereby initiated, an exhibition space where each group explained their poster to those attracted to it.

The Gallery was busy, and the sound level indicated that everyone was talking and sharing visions at a great intensity. It seemed that the group had arrived at a distinctively different quality of conversation

as compared to earlier on in the process. During this hour-long session before lunch, the process was monitored by the facilitators of the Gallery.

“Time for lunch!”, someone from the summer school shouted, trying to get everyone’s attention. They had to repeat the message. People moved out, a little unwillingly perhaps, but seemingly content.

Rules of the Gallery

- Groups are to have one representative at their stand at all times
- The role of this representative is to present the group’s poster and offer reflections on the artwork, as well as to interact and converse with the visitors to the stand
- Groups are encouraged to move around the gallery space and engage with the other groups and their stands.

After the hour long-lunch break, the Col-laboratory continued with the Gallery, to make sure that everyone got the chance to visit each other’s stands before closing this session. Then came the invitation to gather in the bigger group again, sitting on chairs (or the floor) in a bigger oval circle centered around a bulletin board, with paper and pens lying on the floor right in the middle of the circle. This marked the transition, moving into the phase of



Participants listening to the ideas and thoughts on a poster during the Art Gallery.

Some rules of the Open Space

- Find the topic you find most engaging and join that group
- Feel your own presence
- You can change topic and group at any time

the “Open Space”. A new set of instructions was given out by a new group of summer school participants, now inviting the participants to share topics they’d like to further investigate through the collective dialogue. A few people threw themselves into the middle rather quickly, indicating a clear engagement and proclaiming their topics by writing them onto pieces of paper and hanging them up on the bulletin board.

After another short break, the bigger group gathered again.

The facilitators explained the task, this time to the owners of the topic (hereby named the topic holders). They were to open their space by inviting participants to join them in discussing their topics. One group we observed, quickly engaging all its attendants to share their opinions. A challenge we noted here was that the group attendants needed, by the nature of conversations “close to the heart”, to be attentive on how the group’s process evolved as there were no designated facilitators in the groups. Asking one of the participants how they experienced this, he said: “It’s great, I love this kind of talk”.

After intense conversations in the open space, the group then gathered once again in the big circle. A new exercise was initiated by another course participant, trying to stimulate the expended energy levels for the last hours of the event. It resembled the previous ice-breaker, instructing people to stand and clap hands. It did not last for long, but seemed to raise the energy levels a bit. This was the point time to move into the phase of prototyping ideas. As everyone took their seats, the summaries of the

In circumstances without a specific problem and without time pressure for finding a solution, how is it possible to engage people in action regarding the topic?

As Scharmer (2007) noted, a discussion is different from a dialog. While in “above-the-neck” discussions, polarities tend to trigger defensive reflexes, the LiFT workshop had rather tried to engage participants in deeper qualities of dialog. Yet, we also observed that groups sometimes struggled with keeping the appropriate kind of awareness when the conversation touched certain nerves in some participants...

discussions on each topic were shared one by one of the group members.

With the co-creating phase now coming to an end, the fifth and final phase of closure came about – it was time to evolve, co-evolve. Jonathan picked up the microphone and initiated a deeper reflection on what had emerged during these two days. A fellow course participant joined to co-facilitate. He asked everyone to get up from their chairs and take a few steps back, engaging the whole body in a metaphorical sense of taking a meta-perspective of the experiences gained. Complex and cross-systemic issues such as the guiding question of the Collaboratory do not generate quick-fix answers. What had emerged from these days, no one could foresee, and more questions were generated. Only time will tell how this event will influence the course of history in the years to come. So the attendants left the venue room, putting their final dots on the last poll, before leaving or mingling about with their new connections, professionally and personally.

Examining the last poll of the event, we found that nearly all of the dots were centered on the right part of the scale of “I feel engaged”, indicating that the attendants who placed dots were indeed feeling engaged at the end of the event. Reasons for this can be many, for instance the discussed content, as well as the relational aspect of the process. On the second scale “Something is shifting”, we found that most of the dots were put on the higher end of the scale, clearly above a neutral median. This further

indicates that the attendants felt that something was shifting at the end of the Collaboratory. What this “something” is remains rather open to interpretation. We suggest that the attendants at this point were experiencing something that was qualitatively different from the start of the event.

Although the Collaboratory itself had reached its destination, there was yet a day of work ahead for the LiFT summer school.



All attendants are listening to what one of the groups shares from their discussion.

C. One day of debriefing and harvesting learnings through reflection

As the summer school participants gathered in the now empty venue on day 5 of the school, it was time to move towards a closure – the beginning aftermath of the Collaboratory. It began in the big circle, with Jonathan and his colleagues from the LiFT team inviting everyone to share their current state of being. The questions were deep-layered and it seemed to get everyone into a more reflective mode. “What really happened?”, “What did you experience personally?” Sufficient time was given so that now everyone could find a time and space to move forth with whatever they were feeling or thinking about at that specific time.

Dynamics were then changed, as everyone was instructed to stand up from their chairs and engage in pairs of two. This was a kind of “speed dating” activity, where participants were to share their key learnings with each other, moving around the venue space and connecting in a self-organizing manner. Some found similarities in their findings, while others seemed surprised and listened curiously. One example from these conversations, was one that observed the paradox of detailed preparations: “I learned that preparing in a rigorous way, eventually led to more room for improvisations as we were able to adjust to the emergence of unforeseen events”.

How can we end an event that stimulates reflections and facilitates further learning for the participants?

After this, everyone joined their self-organized assignment groups once again. Now, the instructions were for the groups to collectively reflect upon their process, how much of what they had planned was actually implemented, how the outcome was different from what they had expected and why. After a time, the groups gathered into the big circle to share their reflections. The whole group ventured through the entire Collaboratory, focusing on the reflections of each assignment group one after the other. This seemed helpful to harvest the maximum of perspec-

tives and gave room for all make explicit their learnings as a group. Several reflections from the text-boxes throughout this chapter stem from the questions that came up during this sequence. As the participants had already interacted at three different system levels – in pairs, small groups and the entire group, the concentration level understandably were heading downwards at this point in time, and lunch was warmly embraced.

After the restitution and comfort of lunch, the meta-reflection in the plenary continued for a while. After each member or group had presented some (self-) reflective questions, we observed how the LiFT team skillfully and attentively listened, tuned in and responded in a way that seemed to make the subjects discussed more understandable and concisely articulated for the group. Eventually, time ran out and the program had to move on.

After a short break, the perspective of the groups' reflections expanded into a process of envisioning future Collaboratories. Everyone was invited to think about potential application contexts, to create their own prototypes and write them down on paper before moving into groups of three to share their ideas and receive critique. Each of us followed one of these groups and listened keenly. The participants shared well-thought out as well as "real" topics that the Collaboratory could be an expedient design to explore with. After some talk in pairs of three, the group eventually joined together in the large circle again, once again invited to share their ideas with the bigger group.

Unfortunately, time also went by too fast in this session, and so the facilitators had to slowly envision coming to a closure. The space was opened up as people stood up from their chairs. Everyone was then invited to have a couple of short one to one conversations, giving each person in the room three compliments before moving on to the next. We heard one participant tell another "You are attentive, warm and courageous" with the receiver of compliment thanking her without avoiding being ironic or distanced, then directing his own genuine appreciation towards her. The final closure came about by gathering the group in a compact circle, standing in the middle of the main venue room. A final test of trust, as everyone squatted down to sit on the thighs of the person behind, creating a solid weight bearing construction per se. We joined, and to our amazement no one actually no fell on the floor. With this, the summer school had seen its formal closure, although many stayed to enjoy the company of their newfound friends. Eventually, several of the participants were staying for another week to be a part of the continuation of the EDUTOPIA summer school program.

So much for the mere course of events during the Summer School. Below, we will give yet a bit more details about what came up during the reflections on the last day in terms of learnings and take-aways.

Impressions from day 5: reflections and learnings

When we met the participants at the final day after the Collaboratory, the surrounding energy was very serene within a harmonious atmosphere. Starting the day off, the participants took turns during a check-in with sharing their current state of being with the whole group. One of us compared our current state as the complete feeling of lying on the couch right after a workout at the gym, tired but with a floating sensation of satisfaction circling around the whole body – eager to get some nutrition in the form of sharing experiences and by throwing reflections out into the open space. Several quotations were captured during this sequence. Below, we have synthesized the quotes in three different categories belonging to either *content*, *group process* or *personal process*.

Content

When we asked the participants how they were feeling about the content and topic of the Collaboratory, there was a fair mix of opinions, as far as we could tell. A notable statement to visualize this diversity is: “Some people believing Facebook is a social enterprise made me realize what we are dealing with during these two days”, a statement that for us shows that the topic was raising misconceptions between attendants and their understandings. One of the participants showed great interest in the Collaboratory as a method and reflected deeply on how it could be applied to different contexts. Expressing gratitude towards the initiative and methodological approach, one participant noted: “I hope this represents the end of a beginning – the beginning of a new community of this kind of practices”. Another one stated a different opinion with regard to content: “Not crazy about the outcome... good process... not sure about the content/results” – followed by a statement saying that the reflection day was the most interesting one. This last statement might indicate that the participant was uncertain of the outcome, but was most certainly open to learn from the reflections in the aftermath. Our observations leads us to conclude that most of the participants were satisfied with the content, showing great interest in the Collaboratory as a methodological approach and how certain aspects could be applied in other settings.

Group process

One participant seemed to notice the self-organizing nature of the event, stating “Nice to see how everyone seemed to find their own role”, capturing the responsibility of creating their own roles. Another participant noted that “The group managed to create a safe space”, a statement that could be interpreted as how the participant felt a sufficient holding environment within the group space during the event, created and maintained by the group itself. Some were sharing their inner state of well-being, again indicating a positive impact from the group’s collaboration process.

Continuing the reflection on how the group process drew attention on the inner state of his being, one expressed appreciation towards the “nature of the human heart”, a statement that may be directed to an awareness of the ability to shift towards a more mindful and non-judgemental state of being. In contrast to the aforementioned statements, one participant noted that “This should have been more challenging, it feels like we avoided some itchy spots”, a statement that we interpret as showing a concern about the group’s ability to venture out of its comfort zone, giving a voice to the individuals who did not necessarily need as much support as was given through the facilitation.

Personal process

The impression given to the observers was that there was some unfinished business within the participants at the end of the Collaboratory. This might of course imply both positive and negative aspects of the experience, but for us, this symbolizes a recognition that something not yet explicitly embraced and understood was emerging in the consciousness of the group. One participant took the opportunity to ask the whole group “How deep did it really go yesterday?” This might indicate the emergence of something new, at this stage being beyond the articulated form, but yet experienced in the body. Some left remarks of uncertainty, which can be expected in other contexts as well, because of different values, abilities and personal experiences.

Experiencing the Collaboratory in its entirety left one saying “I have been through my whole spectrum of feelings during this”, reflecting how the process of “coming down and back up the U” also moves

the inner state of the participant through different qualities. A similar remark was also made reflecting the process underneath the surface of the pure cognitive level, when a participant stated: “I am still processing this” at the end of the event. This might also reflect the essence of a multilevel methodology. It may take a considerable amount of time to realize the effects gained by such experiences.

As we walked around the venue and talked to the participants, another interesting statement was put forward:

A big part of my process has been to get to know these people [while looking around the circle]. It is fascinating how your assumptions about other people are met; how sometimes they are correct and sometimes they are not.

A statement as the one above might reflect some of the relational aspects connected to these kind of working processes, modelling humility by being open to one’s (for many, taken for granted) assumptions that occasionally result in self-deception and “more of the same” by the nature of our inherent biases. With this, we conclude the brief presentation of our interviews with the participants of the

General reflection

The point that we believe has the most potential for improvement is the amount and kind of guidance in how to facilitate small groups. During the Collaboratory, we witnessed many examples of role confusion with facilitator- and participant roles being mixed by some course participants, and where the facilitators were caught up in the content of the conversation to some degree. It seems that the selection of small group facilitators was voluntary, and anyone could have taken on that role. We believe that this is an important aspect when considering and measuring the impact of these exercises, as well as the results of the whole facilitator training.

The facilitators seemed to have quite different degrees of individual experience of leading group processes. Yet, all participants are invited to learn and should thus all get the opportunity to facilitate small groups. Our main concern here is that the art of supporting group dynamics was not given enough attention and guidance during the training course. Our recommendation for the future is therefore to offer more organized coaching both before and after the actual event. This could be integrated into the preparatory trainings or as a dedicated assignment group. The latter option would also give the participants of such a group (on small group facilitation) an opportunity to share their experiences throughout the course, rather than just on the last day.

Collaboratory. We tried to step back and connect some of the overarching themes of these statements as we perceived them from our perspectives and understandings. It should be mentioned that this only represents a small glimpse of what we gained from the rich conversations we had with the participants over the five days of the Summer School.

D. Analysis of the educational approach

For the last part of this chapter, we aim to describe the main aspects of the educational approach as we observed it throughout the week in Vienna. Using examples from the course, we will try to pinpoint how the facilitation process paved the way for a learning that is rooted in the deeper layers of the body and mind, one that is informed by experience-based learning by doing and by the experience of self-organization.

The power of self-organization

The buzzword of the week was “self-organizing” – which itself is one of the strong sides of the educational approach promoted by the LiFT team. It was clear that the notion of self-organizing systems had been mentioned during the preparatory online trainings, so both participants and facilitators referred to the phrase frequently already on the first day without further explanations. From our understanding, the term denotes a larger system consisting of several smaller subsystems behaving independently. As time passes, the independent behavior of every subsystem is starting to fall into orderly patterns as we observe the system as a whole. A classic example for these phenomena is swarming, like flocks of birds or in schools of fish: Every animal is just acting out from their nearest neighbors, but looking at the system as a whole, it all looks like a predetermined choreography (Carroll, 2016).

Self-organizing can be seen as a way to describe how a process is planned and carried through. If we see an organized process happening based on a fully detailed manuscript, a self-organized process will be the opposite where nothing is planned and where the outcome is purely based on the features and activities of the smaller parts (holons, see LiFT Foundations and Resources book) that make up the system. However, when talking about contexts similar to the Summer School and group process of a gathered quantity of individuals, there is more complexity than just these two polarities. And we assume that in human relations there is no reason to think that it is possible to plan every situation to the fullest. On the other hand, it does not make much more sense to explain the process as an all out self-organizational one either, because we have a predetermined goal or a purpose. Part of this purpose is to train people in designing and facilitating collaboration between a variety of different stakeholders. The applicability of the principle of self-organizing in this scenario will refer to the specific type of leadership that is presented by the LiFT team and how it affects the group process and individual learnings of each participant during the course.

Traditional management and leadership are usually carried out in way that those who are in charge get to decide what is going to happen and who is to carry out the task. However, from a self-organizational point of view, the leaders are letting go of control, letting their subordinates have some degree of freedom to roam the territory, trying to decide for themselves what suits best for the task to be done. Notice how the situation is more self-organized – with the subordinates being able to include more of themselves in the situation, but still with a high-level purpose, task or goal that they have been given. With this, the facilitator invites everyone in the group to play an active role in the procedures of making decisions.

For achieving best results, the facilitators will try to integrate the needs and competencies of every present attendant. The self-organized approach tries to tap into the collective mind, inviting features of each individual within the circumstances. When doing this in present time, the situation also opens up to integrate surprising elements as positive outcomes – making use of the uncertain and unexpected. For describing this further, we can refer to it as a holistic approach which holds that the whole is greater than the sum of its parts – a metaphor that can be used to show that there is no way for the facilitators to have enough information about the circumstances for organizing the event to gain the best possible experiences for everybody involved (see also chapter 3.3 of the [LiFT Foundations & Resources book](#) on the nature and workings of holons).

This is an educational approach that aims to invite all of the participants to claim responsibility for the process, rather than it being imposed on them. In a way, self-organizing leadership is a way to empower as many participants as possible to be in(ter)dependent problem solvers for the sake of the whole group. For those of the readers who are familiar with the works of Robert Kegan (1994), we would

characterize the difference in leadership skills needed for facilitating organized vs self-organized processes as qualitatively different in terms of developmental levels. Shifting from pre-planning and telling instructions in a manner that evokes a socialized mindset to operate, to facilitating a self-authoring orientation to figuring out to realize a goal within a specific context. Put in another way, treating the course participants as humans with a capacity for self-authoring minds that respond to different sets of thinking and behavior that is not just simply enforcing the status quo.

Another feature of this educational approach and how it affects the learning curve of the people involved is that the participants are experiencing and learning from each other in a much greater way than if the LiFT team had been in charge of every aspect of it. If we go back to the holistic statement of “the whole is greater than the sum of its parts”, we can explain it with the parts being in a dynamic state themselves, changing forms based on their interactions with their surrounding parts, giving rise for emergence to happen in a system of the greater whole. “Modelling” is a term used within the field of pedagogy which is relevant when talking about this feature. The understanding of the modelling process has been elaborated by Albert Bandura (1986) in his social-cognitive learning theory. Modelling is happening when a person is making their own experiences out of another person’s appearances (with appearances, we mean physical as well as mental actions – describing how you interpret another being in a specific situation). If you see a person appear in a positive way that you personally like, you most likely try to adapt some of those features into your own behavior when it feels suitable.



The LiFT summer school of 2018, grateful for being one experience richer.

The opposite effect can be said to occur in situations when you perceive appearances that deviate negatively from your own perspective. The case where the facilitators encourage as many people as possible to play an active role in the process will serve as a catalyst for participants to gain beneficial experiences based on modelling each other. The main advantage is that the participants get the opportunity to adjust their own action based on those of all involving parties rather than just the few people who are entitled to claim attention through their ideas.

The term “scaffolded environment” which has been used a lot in the course of the training comes to mind here. This is an environment that encourages and facilitates learning on a variety of different levels, suited for developing a broad range of personalities, present in the group. As one participant stated when reflecting over possible learnings the last day: “Use what make sense to you”.

Group process and line of pedagogy

Throughout the week, several participants reported statements within the lines of experiencing some degree of anxiety during the first day of the summer school. The range of these statements varied in extent, but the overall feeling was that only a handful people were satisfied regarding how their need for an overview of the circumstances were met.

Statements like “I didn’t know what was going on” and “the first day was chaos” can describe a type of uncertainty and how some participants were uncomfortable when being in the early stages of an emerging self-organizational process. A bifurcation point for these felt experiences was observed and recognized in the following process when the participants were supposed to get together in their pre-arranged assignment groups for the first time. For an outsider who didn’t participate in the online sessions on beforehand, this particular time during the session seemed to create a rising state of uncertainty within the space. The transition between the blind dating and gathering in assignment groups was too trivial: The facilitator occupied the space only for a short while and said something like “now you can gather in your groups”, noticing that there were very few people who knew where to go and who to go with. From a self-organizational perspective, it is possible to say that the point is to make participants do reasonable actions themselves. Still, from an educational point of view, the facilitator still needs to secure the space before demanding participants to take full responsibility for self-organizing action.

Day one started out with excitement and nervousness going over to anxiousness and feelings of apprehensiveness. Still, when talking to the participants they reported trust in the facilitators. There was no point at which a participant gave a statement of believing that this Collaboratory would not work out. It is apparent that the facilitators’ expertise and calmness is vital for the participants to trusting the approach. A statement akin to self-organizing is trusting the process, indicating both an attitude of trust from a facilitation point of view towards the attendants, and an attitude that promotes caring and responsibility between the participants and the facilitators.

As the first day was coming to an end, it was clear to see that most of the participants got quite absorbed in the process by adapting a sense of personal and collective responsibility. Regarding the example above, we would argue that facilitators play a vital role in securing the space and creating a sufficient holding environment for a group to emerge.

Even though the participants of this scenario had met each other in several webinars in beforehand, this is an example of how dynamics in early stages of a group process are responding to certain types of facilitation. Our observations were sufficient to state that the level of engagement in the interaction was intensified at a fast rate during the initial day of the project. In very natural ways, some people seemed more comfortable to rise to the challenge of taking lead in the groups and of situations. We interpret this as a result of the spectrum of personalities and their previous experiences in similar settings, as well as of how engaged they were during the preparatory trainings.

On day two, participants seemed to get going more effectively, coming into alignment with each other and self-organize. A vital condition for this process and the resulting outcome can be seen in the importance of releasing tensions within the group space when starting off the day, containing and securing the environment for the participants to flourish in. As we observed on day two, it was evident that the participants were more in charge of the situation as time went by. During the day, it became apparent that the facilitating LiFT team was not in the driver seat of what happened anymore.

The **metaphor of a parent teaching their offspring to ride a bicycle** is appropriate. In the beginning, the parent is keeping their hands on the child or the bicycle to keep it steady, so it won't lose course and eventually crash into the ground and hurting the child. When ready, the parent lets go of the bicycle and the kid has all control over the situation – still, the parent is running along to safeguard against the most extensive damages. This is where we observed the process at day two. After the first day of holding on to and “steering” the process, the facilitators let go on the second day, and the participants found themselves in a phase where they were riding their own two-wheeled bicycle with the LiFT facilitators running alongside giving support where it was needed. Making themselves available to give specific feedback regarding various responsibilities and situational contexts as it happened.

A very common feature which seems relevant for these situations is at the point where the parent is physically letting go of the kid. In many situations, the parent has already released their grip when the child thinks it is capable of riding on its own. Before realizing it, the child is already riding completely on its own. In the same way, we believe that it took a great while before the group as a whole realized that they were riding for themselves. It is important to emphasize that this is a caption of the group as a whole. The individual participants were acting out self-authoring styles at different times during the event, as some even flew out of the gates right from the very beginning.

With the notion of self-organized systems, we have already mentioned how this certain type of facilitation promoted by the LiFT team could be characterized: letting the participants contribute in their own way, based on their motivation and individual feel for responsibility of the process, as well as the product. Our intuitions says that this is an approach, which is appropriate to the creation of a holding environment for people to flourish in. One thing that got our attention during a plenary meeting early on the second day of the week, was that one of the course participants had taken the role of capturing the bulletin board. In all the previous rounds, it had been taken care of by a LiFT facilitator. When asking him how this came to be, he replied something in the lines of “no one was doing it and therefore I saw an opportunity to contribute”. When he stated that “no one was doing it” we suspect him to be somewhat hesitant in asserting himself in this role as it seemed like he was up for the task right from the beginning of the meeting. Undoubtedly, this became a clear indication of how the group dynamics had evolved; making the participants take self-initiated action for the greater purpose of the whole group.

Another but different indication for this particular group process is how one of the participants did not seem to settle in his assignment group during day two. Clearly indisposed by negative emotions for not being able to contribute in a way that satisfied his own demands, he tried to find other tasks in which he could contribute. After representing his assignment group at the logistics meeting he became some sort of a handyman in charge of all technical logistics and electronic support. It became very apparent that this was a much needed role and he harvested much support and appreciation from the rest of the group. The process of hosting the Collaboratory went much smoother with having one person taking care of logistics regarding sound, lights and pictures. Reflecting upon this on the last day, his story resembled somewhat of a rollercoaster ride with ups and downs, but it all ended very favorably for all parties.

Overall, our observations suggest that the LiFT team provided enough support and guidance to let the planning of the Collaboratory happen in a dynamic and rewarding way. Witnessing the pedagogy and the educational approach used in the summer school, awakening a feel for responsibility in the participants was clearly a goal for the emerging process. With these words, we would argue that the terms “coach the trainer” is a better description than “train the trainer”. Indicating that coaching is more about empowering people to take action on behalf of their own experiences rather than training a

person to follow instructions and planned routines; i.e, taking responsibility for influencing a system rather than just fitting themselves to a pre-existing structure.

A reflection on the notion of learning by doing as a group and as individuals

Experience, reflection and experimentation seems to play a key role in the learning process of the summer school, as outlined by our descriptions. Scharmer (2007) also outlines a pragmatic approach to the Theory U process that seems to enable deeper learning. In the following reflection, we take a meta-perspective on the practical wisdom that seems to emerge within in the participants of the summer school. It is no easy task to stimulate for a type of learning that aligns the student with the growing complexity of the world's social and working environments, where the needs for adaptive skills are increasing, in contrast to those coined as technical skills (Heifetz, 1994). This gives implications for how one is to utilise and design the learning context. One can understand that this type of learning needs to be grounded within the individual's mental capacity (as noted by Kegan, 1994). Similarly, Donald Schon (1987) has pointed out that one can simply not be told what "to do" (in a technical sense) in complex circumstances, but must develop an awareness and capacity within oneself that enables for a more adaptive capacity and response to this complexity. We also understand that the practice of leadership calls us to transcend our consciousness beyond the mere rational and logical realm (Reams, 2012). Working with the expansion of the mind also includes working on one's social skills and competency within the relational space (Goleman, 1998) in this complex field. So, how does the learning process, understood through the lens of learning by doing, promote a type of learning that stimulates the expansion of the individual's mental capacity, awareness and social skills beyond just being told what to do?

As David Kolb (1984) proposes in his model of experiential learning, experience plays an important part in the process of any learning (following the lines laid out by John Dewey). In his model, Kolb suggests that four elements are necessary and included in any spiral of learning: Concrete experience, reflective observation, abstract conceptualization and active experimentation. In the core of this model, there is a simple explanation of how experience is translated into concepts that act as a guide to new experiences. In his model, any new form of learning can start at any point of this learning cycle and become more grounded through completing the cycle. As learning cycles are iterated, levels of higher cognitive complexity emerge and competency (ideally) increases.

In our observations of the concept of the summer school, it is clear that the participants are immersed into a wide selection of learning activities, particularly evolving around their experience in the Col-laboratory – each of which facilitating a deeper kind of learning. For example, after completing each of the phases in the summer school, the group goes from an active experimentation to a reflective mode, listening to each other's reflections on their experience from the experimentation. The new-found insights are then, in return, given a space where the reconceptualized/revisited concepts or theories of action then can be fed into a new cycle of learning – giving room for a more sophisticated form of social behavior and awareness. On this next level, it moves from being relatively unreflective and reactive to a more conscious, adaptive and reflected mode of being and acting upon – in other words, a larger complexity of the mind. However, the individual's learning process is not just related to the singular perspective of the intrasubjective, there is larger field to be addressed also in the learning by doing perspective.

The summer school included compositions of groups, from smaller to the bigger whole. Group dynamics are complex, and the individuals operating within a group are always influencing the outcome of the group's output as a whole, as well as the intersubjective experience of the cooperation. This might

be frustrating to some (a relatively conservative statement) and calls upon each member's quality of attention, their listening and influencing skills and their courage to put forth his or her voice and action. As described above, participants of the summer school were exposed to the nature of group dynamics.

One can draw parallels from this to Johnson and Johnson's (1990) learning-together-approach and to what constitutes effectiveness of learning together by utilising task and learning oriented groups (which the group might be characterized as). There are five necessary conditions that increase the likelihood of success in the group's work (ibid.). These are;

- (1) a clear and positively perceived reciprocity;
- (2) a significant occurrence of face-to-face interaction
- (3) the experience of personal responsibility to meet the groups stated goal;
- (4) frequent use of interrelational communication skills;
- (5) the group reflecting on the group's process regularly.

From our observations, it seems clear that the group both at the collective and at the individual level had clear and positively perceived reciprocal relationships, bore the weight of responsibility in the ownership of the collaboration, was engaged in deeper dialogues face-to-face and reflected on the process from time to time (with help from the facilitators). Although this of course varied in relation to each individual's input to the process and how their presence and actions were experienced and perceived by their peers.

Several authors (Heifetz, 1994; Kegan & Lahey, 2009; McClure, 2005; Reams et al., 2014) have also pointed to the importance of having a supportive and trust-invoking environment if the group's potential for learning and performance is to be released. One can see that the role of the facilitators, with their knowledge of the aforementioned body of theory and experience from previous LiFT events (and related events), played an important part in creating an environment that felt safe and supported each participant's developmental level (Heifetz, 1994).

Closing this reflection, the task of creating a safe space where experience-based learning by doing gets the best conditions is an important one. At least if the goal is to enable for deep personal learning that helps the participants to build stronger and wider social and mental capacities (which also can be stated as skills that enable better leadership in the context of the 21. century). This task seems to us to be almost impossible without the presence, attention and influence of the programs facilitators. The needs of the group change during its move towards greater maturity, and one could observe a shift in how the facilitators in the summer school adapted to this process of maturation (maturation being understood here as moving beyond conformity, projective identification and high anxiety levels towards a safer space, where conformity is reduced and the focus shifts to being in service to the greater good). This shift, so it seems to us, was stimulated by the precise and mindful facilitation by the LiFT team.

From this, we can understand that experience played a significant role in the individual and collective learning process in the summer school and the Collaboratory. The experience on both levels, at the intra- and intersubjective level, offer important material for reflection, but the success of the group's cooperation and learning is not guaranteed simply by inviting them to the summer school. It also requires skillful facilitation from the LiFT staff to provide for a type of environment that gives the learning it's desired direction and effect. From this reflection, it also might become clear that the participants not only learn the practical skills of designing and facilitating a Collaboratory, but are also exposed to possibilities for developing their inner skills and awareness, which, together, are crucial foundations for integral leadership.

E. Summary and wrap up

This chapter has offered a report on the LiFT summer school of 2018, which culminated in the Collaboratory workshop in Vienna. The report gives a description of what the program consisted of and how the summer school eventually unfolded. Additionally, a presentation of the harvested learnings is included based on recordings of several rounds of reflection. To complement our recordings, we have also given some thought to what we as observers found interesting from our involvement in the summer school. We discussed these topics in the light of theoretical perspectives in learning theories/pedagogy, adult development, group dynamics and integral leadership. Furthermore, the field of self-organizing was reflected upon as we tried to understand how this influenced the process and outcome of the summer school.

From our perspective, the Collaboratory is not only an exciting approach for social innovation processes, but it also holds significant potential for structuring deeper learning. The 21st century is calling for social innovation on complex issues. More than ever before, there is a need for a type of learning that leads to something more than mere technical skills and capacities – a type of learning that promotes the development of the inner conditions of both the facilitator and the ones being facilitated. To be a part of the summer school as observers and to see how the process of learning unfolded gives us hope that similar approaches may be applied and scaled to a wide array of contexts – especially in systems in the educational realm. For one thing seems to be certain, the complexity of today's world is not going to decelerate any time soon.

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Appendix:

Tables of the summer school schedule

**Timeframes are not very accurately depicted as this was not our main focus. Some of the distinctive phases were not even that clear as to when the transitions happened and how they were experienced between the facilitators and the participants of the summer school. These are rough estimates to give readers a general sense of how the process unfolded.*

| Day one (02.07.18) - from 09 am to 17 pm: "Coming together and getting in tune" | | |
|--|---|--|
| Timeframe* | Sequential description | Practical description |
| 30 minutes | Informal mingling | In the lobby of the venue (Schottenfeldcenter). |
| 30-40 minutes | Formal check-in. - Everyone shares one word each about current feelings and expectations. | Chairs organized in a big circle in designated conference room. |
| 10-15 minutes? | Icebreaker – Blind dates, - 2 minutes each, rotating. | Participants are free to explore the space and find partners for conversation. |
| 1 hour | Assignment groups meet up. - Guiding questions: "What do we know?" & "What are we uncertain about?" | Groups are free to spread out over the venue. |
| 45 minutes? | Plenary meeting. - Groups present understandings from the guiding questions | Sitting in chairs organized in a big circle in designated conference room. |
| 1 hour | Lunch | In a café close by. |
| 3,5 hours | (Finishing of plenary meeting before lunch) Mock Collaboratory. - Guiding question: "What does it take to run a good Collaboratory?" | In the designated conference room. Organizing chairs as in a fishbowl going over to small group setups during the dialogue phase. |
| 15 minutes | Check-out. - Closing reflections and preparations for the upcoming day. | Sitting in chairs organized in a big circle in designated conference room. |

| Day two (03.07.18) - from 09 am to 18 pm: "Detailing the design of the Collaboratory" | | |
|--|--|--|
| Timeframe* | Sequential description | Practical description |
| 30-40 minutes | Check-in: - Sharing expectations and emerging feelings | Sitting in chairs organized in a big circle in main conference room, Impact Hub. |
| 2-3 hours? | Assignment group meeting - Exploring ideas for design. Logistics meeting. - Clarifying logistical details for the event | Groups spread out over the venue. The logistics meeting is held in a separate room. |
| 1 hour? | Revisiting project design in plenary - Group presentations, aligning understandings & mapping a timeline | Sitting in chairs organized in a big circle in main conference room. |
| 1 hour | Lunch. | At the Impact hub. |
| 1 hour? | Continuing work in assignment groups - Building on the understandings from the project design. Working with ideas in greater detail | Groups spread out over the venue |
| 2 hours? | Plenary meeting, going through the overall design - Clarifying details and aligning transitions. Reflecting upon unexpected possibilities | Sitting in chairs organized in a big circle in main conference room. |

| Day three (04.07.18) - from 08 am to 18 pm: "Collaboratory day 1 - going down the U" | | |
|---|---|---|
| Timeframe* | Sequential description | Practical description |
| 1h | Initial preparations | Preparing the venue |
| 40 mins - 1 hour? | Official start - Mingling and registration of external attendants | In the welcoming lobby |
| 45 min - 1h? | Welcoming and introduction in plenary. - Purpose, concept and agenda - presented by Jonathan Reams and Christiane Seus-Schoeller Guiding question: "What needs to shift for social businesses to unfold their fullest potential?" Presentations from experts: - José, Tom, Nicolas and Bertram share their inspiring stories. | Classic set-up for presentations with chairs placed facing the scene. Utilization of powerpoint presentations. |

| | | |
|-------------|--|--|
| 15 minutes? | Icebreaker (1) – Speed dating - Two minutes for each rotation. Music in between. Facilitated by a course participant | People are invited to spread out over the room to establish contact with each other. |
| 15 minutes? | Coffee break. | Reorganizing for the Fishbowl design. |
| 1 hour? | Fishbowl - Initiated by the statements of the four experts, involving participants. Facilitated by a course participant (co-facilitation by several others). Exit Poll (1) | Chairs organized in a fishbowl format. Five chairs in center. Placed on a clipboard hanging by the entrance |
| 1 hour | Lunch | |
| 10 minutes? | Icebreaker (2) - Hands clapping exercise - Raising energy with getting the mind-body flow moving after lunch. Facilitated by a course participant. | People stand in a big circle clapping each other's hands |

| | | |
|-------------|---|---|
| 1 hour? | Dialogue sequence (1) - Deepening vs normal conversation, generating questions. Facilitated by a course participant (co-facilitation by several others). Round 1: Share what came up during the fishbowl Round 2: Ask one question to another member in the dialogue group Round 3: Ask emerging questions to the whole group | 4 participants + 1 facilitator. Spread out over the venue. |
| 1 hour? | Dialogue sequence (2) - Structured conversations. New groups from the former sequence. Facilitated by a course participant (co-facilitation by several others) Round 1: What question do you bring to this group? Round 2: 2-deep-breaths conversation. | 4 participants + 1 facilitator. Spread out over the venue. |
| 15-30 mins? | Coffee break. | Preparing space for the visioning design. |

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| 20-30 mins? | <p>Visioning</p> <ul style="list-style-type: none"> - Initial presencing followed by a guided meditation/ visioning. Facilitated by a course participant <p>Question given: “What does your future look and feel like?”</p> | Chairs and pillows are spread out over the room. |
| 30 mins? | <p>Capturing visualizations</p> <ul style="list-style-type: none"> - Individual capturing with pens and paper. Sharing visions in pairs of two afterwards. Facilitated by a course participant <p>Exit poll (2)</p> | |

| Day four (05.07.18) – from 09 am to 17 pm: “Coming back up the U together” | | |
|---|---|--|
| <i>Timeframe*</i> | <i>Sequential description</i> | <i>Practical description</i> |
| 30 - 40 mins? | <p>Check-in</p> <ul style="list-style-type: none"> - Welcoming and presenting today’s program, Sharing reflections. Facilitated by Jonathan Reams and a course participant | Chairs organized in a big circle in main conference room. |
| 10 mins? | <p>Short meditation practice</p> <ul style="list-style-type: none"> - Connecting with the visioning from yesterday. <p>Facilitated by a course participant</p> | Chairs organized in a big circle in main conference room. |
| 1-2 hours? | <p>Harvesting phase</p> <ul style="list-style-type: none"> - Sharing visualizations in three phases (2+2+4). <p>Facilitated by a course participant.</p> | Spreading out over the Impact Hub. |
| 15 mins? | Coffee break | Preparing group spaces at different locations |
| 45 min | <p>Harvesting continued</p> <ul style="list-style-type: none"> - co-creation of the visualizations belonging to the groups, encouraging creativity. Facilitated by a course participant. | The groups are spread out over the Impact Hub. |
| 1 hour? | <p>Marketplace</p> <ul style="list-style-type: none"> - Presentations of the group products, connecting visions across the group settings. Facilitated by a course participant | The walls in the conference room are used as a gallery with attendants roaming the room. |
| 1 hour? | Lunch | |
| 20 min? | Marketplace continues | |

| | | |
|---------|--|---|
| 30 min? | Open space - Inviting attendants to engage the group in topics of their interests. Facilitated by a course participant. | Chairs organized in a big circle in main conference room with pens and paper lying on the floor in the middle. Topics are hung up on a clipboard. |
|---------|--|---|

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|---------|---|--|
| 15 min? | Coffee break. | Preparing for open space conversations. |
| 1 hour? | Open space continues - Supporting co-created solutions based on the motivations of the stakeholders. Two phases of discussion. Self-organizing group dynamics regarding facilitation of the conversations. | Groups are spread out the venue |
| 5 min ? | Icebreaker (3)/Loosening – clapping exercise in pairs - Raising energy levels and making sure that every attendant keeps engaged. Facilitated by a course participant. | Attendants standing behind chairs organized in a big circle inside the main conference room |
| 1 hour? | Presentation of solutions - Presenting prototype ideas to the whole space. Facilitated by a course participant. | Chairs organized in a big circle in the main conference room. |
| 15 min? | Final closure of the event - Stepping back and reflecting on the process. Facilitated by Jonathan Reams and a course participant. Exit poll (3) | Chairs organized in a big circle in the main conference room. Placed on a clipboard hanging by the entrance |

| Day five (06.07.18) - from 09 am to 16 pm: “Reflecting on the experience – how did it go and what did we learn?” | | |
|---|---|---|
| <i>Timeframe*</i> | <i>Sequential description</i> | <i>Practical description</i> |
| 30 min? | Check-in - Sharing current states of being | Sitting in chairs organized in a big circle in main conference room. |
| 10 min? | Speed dating (x3) - Sharing individual key learnings with each other. | Standing/walking around in the main conference room. |
| 30 min? | Reuniting assignment groups. - Open reflection about the groups’ domains | Groups spread out around the venue |
| 2h? | Meta reflection in plenary - Debriefing the Collaboratory, group by group | Sitting in chairs organized in a big circle in main conference room. |
| 1 hour | Lunch | |
| 1 hour? | Debrief continues | |
| 1 hour? | Collaboratories in other domains - Sharing ideas for hosting other collaboratories. Going from individual, pairs and groups of three before meeting up again in the large circle | Suitable locations for the different sequences, starting and ending in the main conference room |
| 30 min? | Final closure: - Rounds of complimenting each other, ending with a trust exercise. | Within the open space of the conference room |