

LiFT Methodology Book

Designing and hosting Collaboratories

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Contents:

1. Introduction
2. The context: differing settings and how to deal with them
3. The facilitation: Designing and conducting a Collaboratory
- 4. After the public Collaboratory: post-facilitation and follow-up**



LiFT Methodology Book – Chapter 4

After the public Collaboratory: post-facilitation and follow-up

Conducting and facilitating a Collaboratory does not end with the closing round described above. While this is the end of the public event (unless there are several events scheduled in a row), the facilitation role goes on beyond the immediate event itself, if you are aiming for sustainable learning and transformation. One of the success factors of a well-run workshop is to **build a good energy and drive, a true wish for transformation**, but if this energy is left hanging, then the change we wish to see will often evaporate as people leave the workshop. The post-facilitation phase therefore also requires focus, mainly to **ensure that what has been sown during the event facilitation can be harvested and built upon at later stages**, but also to enable you to continuously develop your and your team's capabilities as facilitators.

In view of both harvesting meta-level learnings and ensuring optimal outcomes from a Collaboratory, three aspects should be considered: debriefing/reflection sessions, follow-up activities and documentation.

4.1 Debriefing and reflection

Intensive debriefing has been a constant element of all LiFT workshops so far. Like we dedicated one full day to pre-briefing and physical on-site preparations before each event, we have generally also dedicated extensive time to debriefing and reflecting the experience. Efficient debriefing can be organized in various ways. Here is how LiFT approached this.

LiFT event	Debriefing format
Trondheim, Vienna 2014, Trondheim 2016	1 separate day afterwards
Stockholm 2014	2 separate days afterwards, at a different location, a remote seminar center in a nature reserve
Almedalen 2016	1,5h debriefing immediately after the event, together with the host, 1 day internal debriefing the day after
Caux 2015, Sieben Linden 2017	30-60 min debriefing sessions every evening, general debriefing after the event

At all LiFT events, we had an additional day after the event, dedicated to debriefing. Even though we would mostly also spend time together in the evenings during the event, i.e. having dinner together, it is preferable to have an extra space, in other words, a time and place freed up specifically for this on a separate day. This also allows for some digestion between the event and its reflection. **Deep digestion tends to be more productive if it happens overnight**, for it is generally helpful to create some more distance which brings fresh perspectives onto things.

At the same time, the context and available timeframe is the most significant criteria for scheduling your debrief. And a short or more immediate one is better than no debriefing at all. The table above outlines the most important formats we have used for debriefing so far.

At shorter events (such as the one-day workshops), especially ones run for external clients, debriefing can happen immediately after the event, if time & space allow and while everyone concerned is still available. Alternatively, there can be two distinct things: an immediate debriefing meetings in a larger circle, including both the facilitation team and the local host and organizers, before having another, more intimate “inner circle” debriefing with just the facilitation team.



At the LiFT workshop at Almedalen, for example, the LiFT team had their accommodation outside of town, while the public event happened on a schoolyard inside Visby. Therefore, we chose a mixed format here. First, we took some time for immediate debriefing after the one-day event in a larger group which included facilitators, the local organizing team, the topic giver, the observer team, as well as a number of “extended team members” of the hosting organization. After that, just the LiFT team would have an intensive debriefing meeting of its own the next day at its headquarter in the countryside.

Immediate debriefing after LiFT Almedalen

When debriefing a Collaboratory, similarly to the downloading and dialog phases of an event, the challenge is to **move from more superficial to deeper levels of reflection**, in other words from collecting perspectives, observations and experiences, to interpreting, analyzing and processing them, up until deeper collective learning and drawing conclusions based on the previous steps. Like the Collaboratory process itself, this may take several rounds of sharing, sorting, structuring and harvesting learnings, in order to eventually move towards deeper levels of insight and ultimately, a joint understanding of what has happened at the event and why. This is another reason why taking sufficient time and space for debriefing is essential. As in the Collaboratory itself, **the quality of the space you dedicate to debriefing will determine the quality of its results.**

Another aspect of our experience is that having a team as a resonance space is extremely helpful to be able to grasp the deeper, more complex dynamics that are bound to unfold during a Collaboratory. As various role perspectives come together, a bigger picture gradually emerges that can take into account the various complex layers of such an event. Inversely, debriefing in the team is also a very effective team building practice in itself.



So how can debriefing meetings be structured and organized? In the case of LiFT, not a lot of structure and facilitation was necessary for this, since the team had been working together for quite a while, and sufficient familiarity and mutual trust had been built up for conversations to flow easily. However,

some **practices** have been used repeatedly, while at events with more time, we have also tried new formats.

As a rule, we would simply start with a **check-in round**. If the debriefing took place on the next day, this would allow people to share their immediate states and concerns, and thus, invite them to bring in their whole person before going into a more focused reflection. After that, another round of **more specific sharing** can invite any observations and comments about the event, which then usually leads into a conversation about key aspects and challenges. In the best of cases, a debriefing can itself take the form of a U process and go through all of its phases, from collecting perspectives all the way to creating a new, next event based on the joint learnings. This has actually happened at our 2-day debriefing meeting of the Stockholm Collaboratory on the island of Ekskäret (see pictures below). Admittedly, the unique working atmosphere in a remote seminar center in the Stockholm archipelago contributed a lot to this unfolding of things.

In any debriefing context, it is important to **have the different role holders present** and to hear back from each of them: hosts, topic givers, facilitators, observers, team members assisting or just participating in the process. It is most straightforward to start with the hosts to hear to what degree their intentions have been met, then move on to the facilitators who have been in charge of holding and conducting the process, before looking at each of the other roles one by one.

At the LiFT Stockholm debriefing on Ekskäret, we started by a sharing circle and then moved on to two **reflective team** sessions, consisting of three steps each: First, a selected group of role holders sat in the inner circle and had a reflective conversation between themselves, with the outer circle just listening. After their sharing, second, the outer circle shared their reflections about what they heard from the inner circle conversation between themselves, yet without interacting with the inner circle. Third, the people in the inner circle had an opportunity to reflect back on what they heard from the observers of their conversation in the outer circle. We repeated this practice twice, once with the hosting team in the center circle and once with the facilitation team in focus. Both of these sessions were extremely productive in revealing essential dimensions of the process, its preparation and how the facilitators had worked together with each other and the local host to turn this event into one of the best Collaboratories in the LiFT project.

Reflective team method used for debriefing LiFT Stockholm (2014)



Another dimension of feedback and reflection is to invite **feedback from the external participants** of an event. We have collected feedback sheets from the first public LiFT event in Trondheim (2014) on <http://leadership-for-transition.eu/>

and have extended this data collection practice gradually. For more details see the section on documentation below.

Yet another dimension of debriefing is to check back in with the hosts and with the participant of an event and follow up with them about the projects they have developed a few months afterwards.

4.2 Handling outcomes and following up with them

While in some sense, the follow-up could be considered as the last phase of the Collaboratory, taking place after the actual event, it can also build a bridge to further, future activities that emerge out of one event. In fact, follow-up can sometimes consist of hosting follow-up workshops or even whole new Collaboratories for making use of the momentum and carrying forward the conversations and co-creative process that has been kicked off.

Similar activities obviously need to take place in close cooperation with the local host of an event who generally is the one who brought in the issue in question, because they have a strong interest in making progress on it. So they would primarily be in charge also of coordinating and facilitating any further activities in this direction. As outlined in the context chapter of this book, it is worth considering already in the planning phase of a Collaboratory if one is aiming for just one single event or for several ones – or even a whole series of Collaboratories – and in the latter case, to frame every one of them accordingly. Yet, even if that was the case, each new event creates a new situation, so that a joint check-in with all involved parties about how to proceed is always important.

Since LiFT has mostly focused on the facilitation role, consciously and purposefully separating it from the hosting role, it had less opportunities to also follow up with the stakeholders and participants of each event. However, we did follow up with the local hosts and interviewed them about what happened after “their” events, sometimes several times in a row. Here is a short overview of outcomes of our Collaboratory workshops.

Topic/Guiding question	Where/ when	Short-term outcomes	Long-term outcomes
Co-creating Collective Intelligence for Complex Challenges <i>“In these coming times, what kind of a leader am I called to be?”</i>	Trondheim 2014	Networking among participants, LiFT team familiarized with the method Invitation to have next LiFT debriefing on Ekskåret Projects of participants (no follow-up)	Development of U:turn which later served as the host of the LiFT workshop in Trondheim in 2016
Why School? A visioning workshop about the future of the school	Stockholm 2014	Networking among participants, local projects	???
The Future of Organizations; <i>How can organizations become landing strips for a future we really want to live in?</i>	Vienna 2014	Networking among participants, local and cross-cutting projects	Emergence of Evolution at Work (Organization) which later turned into a LiFT partner itself and hosted the LiFT Summer School
Impact Leadership Track	Caux 2015	Networking among participants, local and cross-cutting projects,	LiFT partner iS! facilitating a Collaboratory at the Caux

<i>How can everybody live well within the limits of the planet? How to translate the global vision of “living well within the limits of the planet” into national action plans?</i>		substantial inspirations for the host’s sustainability work	conference the following year; iS! becoming the Swedish partner of the Caux Initiative of Change
Learning Transition <i>How can education support societal transition?</i>	Luxembourg 2015	Networking among participants, local, transnational, cross-sector and cross-cutting projects	Setting up an MA Collaboratory course at a UK university, Follow-up workshop
The refugee crisis as a touchstone of the European Union. <i>How to integrating refugees in Germany?</i>	Rastatt 2016 (external)	Networking among participants	Follow-up cooperation and project proposal
<i>How can we achieve the UN sustainability goals for Sweden already in 2022?</i>	Almedalen 2016	Networking among participants, enhanced visibility of the topic giver in relevant networks	Follow-up projects on national level
Adaptive Learning in the Digital Age <i>How can we create possibilities for learning that are inspiring and relevant for everyone?</i>	Trondheim 2016	Networking among participants, local, transnational, cross-sector and cross-cutting projects	Follow-up projects on national level and with other Nordic countries
Growing up in Community <i>What does it mean to “grow up”? How can holding environments invite personal growth and transformation?</i>	Sieben Linden 2017	Networking among participants, local, transnational projects	Creating an Academy for young people between childhood and adulthood (NextGen Academy)
Education for Sustainable Communities <i>How can we design and deliver transformative learning opportunities to catalyse the Great Transition in local contexts?</i>	Šibenik 2017	Networking among participants, local, transnational, cross-sector and cross-cutting projects, Presentation at IFIS Online Colloquium	Two European project proposals, Platform for transformative learning
<i>How can transnational cooperation support the integration of NEETs in the Baltic Sea Region?</i>	Tartu 2017 (beyond LiFT)	Experience of new ways of cooperation Networking among participants, local, transnational, cross-sector projects	Ongoing working relationships
... (to be continued)			

For more detail see the sections on post-event activities in the LiFT Case Book.

To sum up, while it is important to provide space for and dedicate attention to what could be called “**holding the emerging projects**”, in most cases, this is primarily a task that the local host and topic owner should fulfil. However, as a facilitator, you can assist them with sensing into what kind of follow-up activities, or even events, could be helpful – and if hosting another (follow-up) Collaboratory would be a good idea.



LiFT is eager to learn from your experiences. So if you have hosted a Collaboratory on your own, we would love to hear from you about any interesting outcomes!

4.3 Documentation

One of the main goals of this LiFT project was to make available and disseminate our experiences from working with the Collaboratory to wider audiences. Therefore, we developed an observation and documentation strategy early on in the project. However, this degree of thoroughness in observation and documentation likely goes beyond what you can normally do as a Collaboratory organizer, let alone facilitator. Nevertheless, it can be very valuable to document at least certain aspects and elements of your Collaboratory, provided you have the necessary resources for doing so. We see at least **three different levels at which documentation can happen**, depending on the overall goals, and your available resources and possibilities.

Level, purpose	For whom	What is observed/docu-mented?	Tools, methods
1 Harvest results	<ul style="list-style-type: none"> • Host, • client, • participants 	<ul style="list-style-type: none"> • What happened? • People, • venue, • overall atmosphere, • results 	<ul style="list-style-type: none"> • photos • flipchart posters • summaries of working group out-puts • materials and concepts produced during the event
2 Evaluate results	<ul style="list-style-type: none"> • Host, • client, • interested public • funders 	<ul style="list-style-type: none"> • how did things go? • What impact did the event have on the partic-ipants/stakeholder net-work • Which broader impacts? 	<ul style="list-style-type: none"> • Feedback sheets • Feedback interviews • Documentation of projects • Follow-up on project
3 Analyse results	<ul style="list-style-type: none"> • Multipliers, • trainees, • researchers 	<ul style="list-style-type: none"> • How well did (specific) things go? Why? • What could have been improved? Why? How? 	<ul style="list-style-type: none"> • In-depth observation and documen-tation, • Post-event debrief and reflection, • Reflective interviews with facilita-tors, hosts and other role holders

The most straightforward way to document an event is to capture what is most easy to capture, namely **the external dimension of what is happening** (who does what, when, with whom etc.). This can be done by taking photos, videos and notes. Also, the process will likely produce a number of visible out-puts, for instance brainstorming notes or flipcharts with the results of working groups. These can equally be documented by taking pictures or keeping these items themselves. More recently, it has <http://leadership-for-transition.eu/>

also become a common practice to engage a graphic harvesting professional who can provide a visual documentation of the process, capturing important moments, cues and turning points in a light and focused way. It is generally in the interest of a local host, or even a facilitator team to have a similar kind of process documentation available for their record, to make visible their activities to the larger public and as a marketing tool for further events. Even if you are just hosting a single event, this level of documentation should be accessible in most cases, even with a relatively small resources.

The second level of documentation goes beyond the first one in that it also tries to access some of the **invisible dimensions of what happened** during the process. In particular, it looks at how participants and other groups (important stakeholders, host, funders etc.) have experienced the process and what their reflections about it are. This can be done with the help of feedback sheets, or by an exit poll, or by a feedback interview that is taken with selected participants after the closing of the event. If you have the necessary technical and staff resources available, feedback can also be collected via online surveys that participants can fill out on their mobile devices. Also, you can record interviews and make short video clips out of them. All of these tools have been used at some stage by the LiFT project. For examples check out the following attachments:

- [LiFT Feedback sheet](#) Trondheim (2014)
- Feedback interview, [video clip with a participant of LiFT Caux](#) (2015)
- Feedback interview, [video clip with a member of the facilitation team](#) (LiFT Caux, 2015)
- Feedback survey online, [Collaboratory Tartu](#) (2017, outside of LiFT)

In addition to these tools which primarily look at the short-term impact of the event, i.e. the more immediate reactions of those who attended it, following up with participants and local hosts some time after the event is a way to **evaluate its more long-term impacts**. For instance, we have generally interviewed our local hosts about three months after our workshop to hear back from them about any progress of the projects that have emerged of the Collaboratory.

The first and (elements of) this second level of documentation can well be combined, provided that resources allow. Especially if your event is funded by third parties, the latter generally appreciate some form of evaluation of impact and follow-up.

In the LiFT 2.0 project, thanks to generous funding, we had the necessary time and resources available to go even deeper in the process of observing, evaluating and documenting our events. This book, along with the other LiFT outputs, are the result of a more thorough self-reflection and analytical work, which was based on our observation and documentation strategy mentioned earlier. Obviously, LiFT has also practiced the two levels of documentation outlined above, including professional graphic recording at several of our events (Vienna 2014, Luxembourg 2015, Sieben Linden 2017, Šibenik 2017 and at the Summer School in Vienna 2018). For detailed results of these, please check out our case studies in the LiFT Case Book.

In order to study how facilitation design could best respond to various contextual settings, we not only documented what happened each event (which was all we could do in the LiFT 1.0 project). Besides this, in LiFT 2.0, we implemented a third, deeper level of observation and were able to do two more things. First, we **documented the process of developing each Collaboratory design**, including the considerations behind specific choices and possible alternatives. Second, we also had a **participant observer team** during the whole event, where each observer had a specific observation role and a clearly defined task, based on what we assumed would be interesting and relevant dimensions to look deeper into. In a nutshell, their task was to look at how the actual facilitation activities worked out from a

participant perspective. Furthermore, in addition to the second level of documentation, we took interviews after each event, both with participants and with members of the design and facilitation teams. The latter invited post-event reflections and aimed for making our learnings more explicit. Moreover, through the funding which provided the space for this kind of intensive processing and reflection of experiences, we were able to spell out some of the more tacit dimensions of what happens during the facilitation of an event, some of which we had not been completely aware of ourselves before, and which only became clear during the reflective interviews.

When looking at how facilitation was planned – and actually implemented, questions such as the following were studied in order to evaluate the quality of interactions and interventions during the Collaboratory:

- Why did the facilitators chose certain elements and tools when preparing the Collaboratory? And how did they combine those tools and build them into the design in a specific way? (interviews with facilitators)
- How did they evaluate which context factors were important to be considered in this regard?
- How did their strategy work out in hindsight? What were the challenges, pitfalls and learnings in each case?
- Which interactional dimensions appeared important?
- How did specific interventions of the facilitators generate specific dynamics within the group and shape the process in a certain way? (observation field notes by participant observers)
- What was the perspective of the participants on this? (interviews with participants)
- What was the perspective of the facilitators on this? (interviews with facilitators)
- What was the role of the inner state of the facilitator(s) at specific moments in the process? (interviews and observation)

What we have gained out of these observation activities has been integrated into this book, as well as into the LiFT Case Book. In result of this documentation of our experience, we hope to give interested users of the Collaboratory a clearer sense of the “hows” and “whys” behind what can be seen on the surface of an event.



LiFT is eager to learn from your experiences. So if you have hosted a Collaboratory on your own, we would love to learn about any documentation you are undertaking!

4.4 Closing remarks

This book has looked at which specific methodological tools and elements can best be used at which points in the Collaboratory process and why. It has also looked at how some of them have been used in the LiFT context and what impact they had (positive or negative). It has offered considerations and suggestions about how specific tools could be modified and/or combined with each other in response to specific challenges in differing contexts. Based on a comparative evaluation of our experience, its focus has been primarily on the most important practical needs that a Collaboratory design and facilitation team is facing.

While LiFT is happy to share its experience and strongly encourages others to make use of the powerful method of the Collaboratory, we also stress that there is **no simple recipe for hosting a successful Collaboratory** that can be put into practice right away by simply following instructions from a textbook. **Hosting Collaboratories is more of an art than an exact science**, because no context and no setting is ever the same as the previous or any other one. Rather, practitioners will have to intelligently adapt the method to their respective context with the specific challenges it might contain. This means that it needs both experience, intuition and a good sense of skill to not only find the design that is appropriate for your specific context, but also to deal with the inevitable twists and contingencies that are likely to emerge during the process. In result, we hope that users of this book will build up their own experience and grow into practicing the Collaboratory work “on the job”.

We hope that studying this book will provide you with the experience that underlies our dissemination efforts, namely that hosting Collaboratories can be learnt, as long as you are ready to make the necessary steps. Depending on the degree of your previous experience and level of proficiency (see the table in chapter 1), **you will likely feel more comfortable with some parts of this complex challenge than with others**. This is perfectly normal. Moreover, one feedback from participants of our facilitator training was that they felt more confident with certain elements as a result of the training, and have a better sense of where their “goldilocks zones” and, inversely, their weak points, are. To learn more, do check out our **facilitator training** which provides you with the right combination of support, scaffolding and challenge to make your own specific next steps towards mastery.

Furthermore, we hope that this book – as part of the LiFT book series as a whole – not only serves you as a valuable resource, but thereby also contributes to **spreading collaborative methods** across domains, sectors and decision-making levels all over Europe. This way, we hope to win your support for disseminating the collaborative paradigm to a wider audience and ultimately, to help pave the way towards a broader paradigm shift in business, politics, science and the larger society, in other words, to **facilitate large-scale societal transformation**.