

## Designing a Collaboratory – intention, rationale, tools and necessary considerations for each phase

Phase	Main intention, goals, functions	Needs/considerations/to dos	Methods and tools	Desired outcomes (interior, exterior)
<b>Preparation</b> (before the actual event)	<ul style="list-style-type: none"> <li>Clarifying the purpose of this specific collaboratory, of relevant stakeholder groups, conditions of implementation</li> <li>Liasing with key stakeholders, identifying their needs and concerns</li> <li>Defining and fine-tuning the issue through an iterative process with local host and stakeholders</li> <li>Attracting relevant participants</li> </ul>	<p>Make sure the essential elements for a Collaboratory to be a suitable method are in place            Get as complete as possible a map of the constellation of these elements in the given case and how they could influence the quality of the collaboratory process and its outcomes such as</p> <ul style="list-style-type: none"> <li>Contextual conditions (time, space, venue, surroundings, setting, scope)</li> <li>Hosting conditions (host, case giver, general topic, network and type of relevant stakeholders, their expectations and familiarity with similar processes -----)</li> <li>Process related conditions (available facilitators, potential influences, specific risks and challenges)</li> <li>“Subtle” conditions (connections between stakeholders, tacit and implicit assumptions, hidden agendas, conflicting roles, unclari- ties, complexity levels of thinking etc.)</li> </ul>	<ul style="list-style-type: none"> <li>Application Forms</li> <li>Written invitations</li> <li>Marketing materials</li> <li>Phone calls/Zoom calls</li> <li>Meetings</li> </ul>	<ul style="list-style-type: none"> <li>Issue clarity, guiding questions</li> <li>Initial contributors to the fishbowl that are committed and briefed</li> <li>Sufficient number of diverse participants signing up</li> <li>A suitable and comfortable working environment</li> <li>Understanding the composition of the facilitation team</li> <li>Understanding the general level of complex thinking, in order to have appropriate stretch for participants and to avoid both overwhelm and “boredom”</li> </ul>
<b>Opening and introduction</b>  <b>0.a – Welcoming</b>	<ul style="list-style-type: none"> <li>Preparing the space</li> <li>Welcoming participants</li> </ul>	<ul style="list-style-type: none"> <li>Create a welcoming space of appreciation</li> <li>Make people feel safe and at ease, so they can relax and be open to follow the flow of the process and their curiosity</li> <li>Particular attention might be given to provide opportunities to connect for participants who come alone.</li> </ul>	<ul style="list-style-type: none"> <li>Have a welcoming team / specific roles around creating a welcoming atmosphere for participants</li> <li>Create alignment in the facilitation team in view of radiating appreciation and curiosity towards the participants (give attention to the ‘inner condition’ of the team)</li> </ul>	<ul style="list-style-type: none"> <li>A safe-to-open up- atmosphere</li> <li>Reduce potential feelings of being alone among strangers</li> <li>A sense of wellbeing, lightness, curiosity</li> <li>Demonstrate the ‘inner condition’ of the hosting and facilitation team</li> <li>Allow letting go of defense mechanisms</li> </ul>

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<b>0.b – Introduction, framing and orientation</b>	<ul style="list-style-type: none"> <li>● Setting the right tone for the overall event</li> <li>● Recall the Why of the event</li> <li>● Give framing, context and orientation</li> <li>● Making implicit information explicit to release attention for the process</li> </ul>	<ul style="list-style-type: none"> <li>● Opening the event: welcoming participants, introduction by/of the local host, facilitation team and other relevant groups</li> <li>● Introducing the topic, issue at stake and the question to be addressed</li> <li>● Framing the event in relation to topic, stakeholder groups and broader social challenges</li> <li>● Explaining the program and the collaborative process</li> <li>● Acknowledging the organisation team</li> </ul>	<ul style="list-style-type: none"> <li>● Different forms of presentation and/or storytelling</li> <li>● Introductory “teaser” video</li> </ul>	<ul style="list-style-type: none"> <li>● Building the ‘holding environment’</li> <li>● Orientation, trust, reduce confusion</li> <li>● General understanding of the process, its phases and intended outcomes</li> </ul>
<b>0.c – Getting to know each other</b>	<ul style="list-style-type: none"> <li>● Creating a space of wholeness where participants can show up beyond their social roles</li> <li>● Creating connection between participants</li> <li>● Building momentum for the overall informal, co-creative approach</li> </ul>	<ul style="list-style-type: none"> <li>● Chose tools that match the available time and space</li> <li>● Consider what is the right level/degree of closeness/challenge for the group</li> <li>● Combine personal self-presentations with motivations related to the topic/event</li> <li>● Include elements of play</li> </ul>	<ul style="list-style-type: none"> <li>● Ice-breaker, „speed dating“,</li> <li>● mutual interviewing and presentation in tandems</li> <li>● sociometric constellations</li> <li>● check-in questions</li> <li>● Describing the felt sense of an object passed around</li> </ul>	<ul style="list-style-type: none"> <li>● First authentic connections among participants</li> <li>● Sense of trust and safety with each other and the diversity in the room</li> <li>● First sense of the diversity of viewpoints that are present</li> <li>● Increased momentum, dynamic, curiosity and fun</li> </ul>
<b>Phase 1 – Downloading (open mind)</b>	<ul style="list-style-type: none"> <li>● Inviting a broad diversity of perspectives on the issue into the room,</li> <li>● thereby enriching the conversation, taking it beyond usual formats</li> <li>● Stimulating the expression of expert and non-expert understandings of aspects of the issue (everyone is an expert of their perception)</li> </ul>	<ul style="list-style-type: none"> <li>● Give some framing/overview as to different possible perspectives about the topic</li> <li>● Make the invited “experts” known to the audience, explain why they have been invited</li> <li>● Explain the basic rules of the session/ fishbowl</li> <li>● Have a PPT slide or flipchart visible to recall the rules</li> <li>● Design suitable ways to allow a broad range of viewpoints on the matter to be expressed</li> <li>● Facilitate active listening and openness to other, maybe unusual viewpoints</li> </ul>	<ul style="list-style-type: none"> <li>● Fishbowl</li> <li>● Half-fishbowl</li> <li>● Roundtable</li> <li>● “Fireplace”</li> <li>● Talking stick/object (can be the microphone)</li> </ul>	<ul style="list-style-type: none"> <li>● Many diverse viewpoints are presented and heard</li> <li>● Experts/non-experts are being acknowledged alike for their contributions</li> <li>● Default knowledge and reactions get their due attention and can then be transcended, making room for new, challenging perspectives and deeper dialogue</li> </ul>

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<b>Phase 2 – Dialogue</b>  <b>(open heart)</b>	<ul style="list-style-type: none"> <li>● Give people time and space to digest the fishbowl/expert information</li> <li>● Taking the conversation deeper, beyond previous mental perspectives</li> <li>● Engage participants personally, invite them to open up and show up beyond their usual social roles</li> <li>● Allow deeper sharing through generative listening, suspending judgement,</li> <li>● thereby slowing down the process</li> </ul>	<ul style="list-style-type: none"> <li>● Find appropriate practices to match the experience of the group</li> <li>● Provide suitable spaces for small groups to talk in a more “private” setting (i.e. breakout rooms)</li> <li>● Consider whether small group facilitators would be helpful</li> <li>● Design simple enough instructions to facilitate empathic and generative listening, for instance by inviting</li> <li>● to suspend judgement and observe the effect thereof on one's own sense of self and the connection to others</li> <li>● to become aware of one's own impulses (mental/emotional) that interfere with empathic/generative listening</li> </ul>	<ul style="list-style-type: none"> <li>● Small group conversation/ breakout group work</li> <li>● Deep dialogue</li> <li>● Bohmian Dialogue</li> <li>● Reflective walk</li> </ul>	<ul style="list-style-type: none"> <li>● Suspend and go beyond familiar patterns and contents of conversation</li> <li>● Slowing down the thought process</li> <li>● Access more intuitive knowledge in individuals and the group</li> <li>● Increasingly authentic communication among participants</li> <li>● Awareness of cross-connections in the complexity of the topic</li> <li>● Sense of mutual connection and responsibility</li> </ul>
<b>Phase 3 – Visioning Presencing</b>  <b>(open will)</b>	<ul style="list-style-type: none"> <li>● Diving into the desirable future where the challenge in question is already solved</li> <li>● Accessing and drawing on information from there by using intuition and imagination</li> <li>● Backcasting from the visionary future for defining steps of how to get there</li> </ul>	<ul style="list-style-type: none"> <li>● This is the core = most important part of the Collaboratory! It thus needs to be carefully designed and framed.</li> <li>● Carefully consider what degree of depth (letting go of mental control) is acceptable to the given group to avoid resistance</li> <li>● Make sure there is no disturbance during this phase, have people stay in the room</li> <li>● Find a suitable method to take people out of their minds into relaxation</li> <li>● Carefully design and pre-formulate a visioning journey that takes participants into a future where the challenge is solved.</li> <li>● Use simple, clear and positive language (no abstraction, no negative formulations) that invites people to dive into the future reality with their inner <i>senses, not thoughts</i></li> </ul>	<ul style="list-style-type: none"> <li>● Physical exercises before and after, for grounding participants in the body, i.e. through respiration, body-scan, Tai-Chi etc.</li> <li>● silence, mindfulness and deep listening</li> <li>● Guided meditation</li> <li>● Guided visioning journey</li> <li>● Backcasting</li> <li>● Silent Constellations</li> <li>● Social Presencing Theatre</li> <li>● Vistar</li> </ul>	<ul style="list-style-type: none"> <li>● Connect with an inner vision of the desired future through the experience of “Presencing” (suspension of reasoning)</li> <li>● Diving into the realm of collective intelligence (sense of connection to the bigger picture)</li> <li>● Being able to capture information from the future</li> </ul>

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<b>Phase 4 – Crystallizing, harvesting and condensing the vision</b>	<ul style="list-style-type: none"> <li>● By harvesting individual visions, explore areas of overlap and traction</li> <li>● on this basis, crystallize the joint, collective vision of the group, that is strong enough to act as an “attractor”</li> </ul>	<ul style="list-style-type: none"> <li>● Several steps can be combined to move from what has been experienced individually in the visioning towards the larger joint vision</li> <li>● For harvesting individual visions, artistic expression is mostly helpful to support individual meaning making → prepare necessary materials for drawing, painting etc.</li> <li>● Make sure to condense and combine individual visions to let small group/collective vision emerge out of diverse elements</li> <li>● Find ways to express the collective vision and make it visible as a reference</li> </ul>	<ul style="list-style-type: none"> <li>● Painting and other ways of artistic self-expression</li> <li>● Vistar circle</li> <li>● Vision harvesting from Dragon Dreaming</li> <li>● Art gallery</li> </ul>	<ul style="list-style-type: none"> <li>● More consolidated individual and collective visions which have more traction and carrying capacity</li> <li>● Experience of the power and dynamics of co-creation beyond Ego and its transformative potentials in view of shared societal challenges</li> </ul>
<b>Phase 5 – Prototyping Co-creating</b>	<ul style="list-style-type: none"> <li>● Building concrete, actionable projects based on the vision</li> <li>● Identifying relevant next steps for implementing each project</li> <li>● Define roles supporting the implementation</li> <li>● Have participants commit to specific tasks</li> </ul>	<ul style="list-style-type: none"> <li>● Provide suitable spaces for small groups to work</li> <li>● Provide enough time to let projects emerge</li> <li>● Consider some kind of mapping to show how single projects are all part of a bigger (wiser) picture of the future</li> <li>● Briefing working groups to come up with roles, tasks and names of who is responsible for what is a good idea</li> </ul>	<ul style="list-style-type: none"> <li>● World Café, Pro Action Café</li> <li>● Open Space -&gt; build subgroups</li> <li>● Backcasting</li> <li>● Recall guiding questions</li> <li>● Posters can support focus</li> </ul>	<ul style="list-style-type: none"> <li>● Translate the vision into actionable projects</li> <li>● Sense of who resonates with whom to work together</li> <li>● Experience of the power of co-creation (getting from vision to action together), experience the future by doing (not just thinking)</li> <li>● Sense of possible barriers for implementation and ideas on how to deal with them</li> </ul>
<b>Phase 6 – Closing Harvesting results, wrap-up and closing ceremony</b>	<ul style="list-style-type: none"> <li>● Harvesting results, identifying potential synergies between different projects</li> <li>● Celebrating results and handing them back over to the local host for follow-up</li> <li>● Reflecting back on the process</li> </ul>	<ul style="list-style-type: none"> <li>● Make sure to get the projects framed in concrete, tangible and doable ways</li> <li>● Make sure to have one responsible contact person for every project and their contact info</li> <li>● Provide clarity as to who is taking care of follow-up and in which delays</li> <li>● Participants’ inner commitment can be supported by some ritual or ceremony</li> </ul>	<ul style="list-style-type: none"> <li>● Short group presentations to the plenary</li> <li>● Gallery</li> <li>● Poster session</li> <li>● Marketplace</li> <li>● Closing ritual or ceremony</li> </ul>	<ul style="list-style-type: none"> <li>● Well-calibrated projects with a realistic chance to be implemented, knowing what is next</li> <li>● A sense of completion</li> <li>● New connections that last beyond the event</li> <li>● Suggestions for improving the process</li> </ul>

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<b>Post Collaboratory Follow-up</b> (optional; should mainly be tone by local host)	<ul style="list-style-type: none"> <li>● Provide encouragement and support when “hitting the road”</li> <li>● Keep motivation, inspiration and commitment up</li> <li>● Inform about progress (and failures)</li> </ul>	<ul style="list-style-type: none"> <li>● Check contact details</li> <li>● Circulate event report and update info among participants</li> <li>● Follow-up event?</li> </ul>	<ul style="list-style-type: none"> <li>● Self-organised groups work on projects</li> <li>● Peer-to-peer follow up</li> <li>● Mentoring on request</li> <li>● Database for gathering news from the projects...</li> </ul>	<ul style="list-style-type: none"> <li>● (Increased capacity for) self-organisation, finding good-enough solutions to realise the agreed tasks</li> <li>● Visibility of ongoing work and its outcomes</li> </ul>