

Information for moderators of  
collaboratories:

## The 50+20 Collaboratory - methodology and approach for short one-time sessions

The philosophy of the collaboratory forms the key feature of the 50+20 vision and involves a circular space that is open to concerned stakeholders to meet on equal terms for any given transdisciplinary issue.



The collaboratory embodies the overarching philosophy that unites the three proposed new roles of management education for the world into a concrete action research and learning approach. As such, it represents an open-source metaspace: a facilitated platform based on open space and consciousness building technologies. A collaboratory is conducted without formal separation between knowledge production and knowledge transfer, while focusing on visceral real-life issues and developing solution in a process of engagement that is driven by challenges, not theory.

While such a process typically spans a series of collaborative sessions over a period of time, it is possible to run a single one-off collaboratory session as a real-life demonstration of our emerging philosophy. We will run a number of such sessions at the RIO+20 conference to engage concerned stakeholders in current burning issues that are at the heart of creating the sustainable world we are all striving for.

Here is a simplistic script that can be used by experienced and professional coaches and facilitators. Clearly, each moderator of the session is invited and required to use his or her own open space and consciousness building methods and tools as the situation of each session is unique and demands skillful and adaptive facilitation which is, after all, more of an art than a science.

**The basic set-up** of any collaboratory is *always* circular, with an inner circle of 4-8 people (the number depends on the total time available. The less time, the smaller the number) representing the key stakeholder perspectives of the issue to be addressed. This inner circle is embedded within an outer circle of an active audience of stakeholders who are interested and ready to contribute to the discussion and reflection. While the inner circle should be seated (ideally on benches), the outer circle can be either seated or standing. The shorter the session, the better the standing option works.

Please do not share this paper with stakeholders you invite to form your inner circle - they may feel quite overwhelmed by this phased approach. We have added a brief description you can send to them, or use as a script to invite them to your session.

Irrespective of the length of a session, we suggest splitting the allotted time into the following *three phases, each using approximately the same amount of time*. Please pay particular attention to your time management - there is nothing worse than getting stuck in one of the phases or not being able to complete the entire process (this is a real challenge - you may want to assign a time keeper to assist you):

## **Phase 1: Bringing out different perspectives on the issue at hand**

*Step 1:* Each stakeholder in the inner circle is invited to express his or her perspective and understanding of the issue including concerns, challenges, forgotten issues, unforeseen risks and long-term consequences, and considerations that need particular attention given the transdisciplinary nature of the issue at hand.

*Suggested method:* It is helpful to use the talking-stone approach to slow down and deepen the discussion. Place a stone in the center of the inner circle and explain to all present that the discussion is led by the wisdom of the stone which holds the capacity to listen in silence. If somebody wishes to speak, he/she picks up the stone and holds the stone while speaking from their seat. Once finished, the stone is returned. *Nobody* is allowed to interrupt a speaker holding the stone - this avoids mental interference and unreflected debates. Please also mention that the stone likes to lie still for a moment after being posed back in the center to digest what has been said. The facilitator intervenes sharply if these rules are not respected - usually, no more than 1-2 such interventions are needed and the group gets it and the process starts.

*Step 2:* If there is enough time and all stakeholders have expressed themselves, the facilitator opens the inner circle to invite other participants in the outer circle to join the inner circle to further expose the issue at hand. This is an important step and facilitators should ensure that at least one person is replaced to ensure inclusiveness with those present.

*Suggested method:* Depending on the set-up, there are different options to include participants from the outer circle to join the discussion. You can either place an empty chair in the inner circle which can be filled by anybody who has something important to add to the dialogue (best option if time and set-up options are limited). Alternatively, if you use two-seater benches, a person from the outer circle can sit next to a person in the inner circle they would like to replace. The original stakeholder leaves the bench as soon as somebody sits down beside them, unless they are speaking - in which case the speaker finishes what they want to say and before replacing the stone back in the center. A third option is to place an empty chair behind each chair of the inner circle. A participant from the outer circle chooses behind which original stakeholder they want to sit. When changing places the original inner circle person frees their space and joins the outer circle.

## **Phase 2: Finding the common space**

*Step 1:* Here, the energy shifts from collecting different perspectives to understand the issue at hand from all of its many transdisciplinary perspectives, gathering a systemic and holistic understanding that reflects the common consciousness of all people present (irrespective of the fact whether they have expressed themselves or not). It is important to announce that nobody should leave the inner and outer circle and that everybody's active engagement is needed for this next phase. The objective of this phase is to grow towards a holistic solution or resolution of the issue at hand.

There are many ways to call upon the group consciousness and this is the phase in the process that demands the majority of professional experience from a coach. A coach is trained in creating and holding a space for the highest potential of the moment to emerge. Please feel free to use your own method and approach - this must work both for you, enabling you to be authentic and whole is critical to the success of this phase. The shorter the total allotted period, the more challenging it becomes. Trust in yourself and in the power of the moment. Personally, I like to use a highly abbreviated version of Otto Scharmer's Theory U process.

*Suggested method:* Always begin with a moment of silence as a way to shift from Phase 1 to Phase 2. Invite everybody present to take a deep breath and to close their eyes if they are comfortable doing so.

Bring them into their bodies (breathing is easiest) and talk them through their thoughts and emotions that have been stirred up in Phase 1. Have them feel these in their bodies by inviting everybody to observe what changes they notice in their body as they let go of their thoughts and emotions. Ask them to focus on what common themes and what deeper underlying or strategic (bigger) images or scenarios emerge. Invite everybody present to imagine that together the wisdom of the crowd holds the seeds of the solution, and that this can be expressed or experienced by seeing images, hearing sounds or other inspirations from their broader senses - beyond thought and emotions.

Step 2: With a quiet voice and attitude, collect the images and impressions that have emerged from the group. Start first with the inner circle before inviting the outer circle to make a contribution with additional relevant input. Draw attention to the fact that most often a common theme or picture emerges, nearly as a story that is told by all those present. To close this phase, summarize what has been shared by picturing the image or theme that emerges from the stories told. Take notes or draw pictures - this is fascinating work. Something profoundly new and visionary nearly always emerges. If nothing comes up, simply summarize the key points that seem intuitively important to you.

*Suggested method:* Your facilitation is needed to ensure that contributors don't get into their headspace or share intellectual pre-thought solutions. While this can hardly be avoided, you want to re-frame the inputs carefully. Depending on your energy and how you hold the space, you will no longer need the talking stone. If you feel unsure, please rely on it. Your insecurity can hamper the process. Again, trust the moment.

### **Phase 3: Developing prototypes for immediate action**

Step 1: Another energy shift occurs as we emerge from phase 2. We move from the space of deep reflection (the group consciousness if you want, but don't scare people off!) to concrete action. The critical difference in our approach is that actions that emerge are inspired from a deeper place, rather than simple intellectual or emotional reflections. Having attempted to identify the common vision, the ideal state of the issue at hand being actually resolved, and having gained a first glimpse at a new image, theme or story, the emerging actions are often fundamentally new. These actions emerge from the future, from the imaged ideal state and are fundamentally different in nature from current solutions that emerged from having analyzed the problem in all of its sub-elements. You want to make this difference clear.

*Suggested method:* Depending on time and how you sense the group, you can either work with the people in the circle or you can invite anybody creative and innovative who is keen on action from the outer circle to join the inner circle. The method here is creative brainstorming where you ask two people from the outer circle (who you have ideally pre-informed) to note down any ideas of concrete action that can be initiated right *here and now* in the coming two weeks at most (ideally still at the conference). The rule of the game is that nobody is allowed to comment or question an idea. After a quick round, have all the ideas read aloud and have a third person (or one of the inner circle) write down particularly strong ideas where you can sense the most energy of the group. Feel free to use any method that works for you to focus the list on a maximum of 3-5 items. Make sure you include items that have local relevance and also at least one item that seeks a global solution.

Step 2: There are many different ways to obtain concrete outcomes: a) you may want each participant to identify one concrete action to be undertaken and reported back to the group in the last step, b) you may want a sub-group to engage in a concrete step towards a joint project, or c) you may want the majority or entire group to agree to a joint next step, meeting, etc. This depends much on the total time you have at hand for the collaborative session (individual action is ideal for short sessions). If time permits, you want to identify people (names and contact details) with energy to work on the 3-5 items identified. Ensure that there are at least three persons per item. Have each of them express in one sentence (strictly due to time) why they want to do it and do it *now*. Ensure that the three persons have a working space to sit

together right after the end of this session. Identify one person who will report back to you within 4-6 days with concrete next steps. Forward this input to 50plus20.org.

*Suggested method:* Whatever works for you. This is basic project management and facilitation. Close the session with something of significance before the circle dissolves: a poem, citation, an impression by you or by anybody else among the participants. Thank everybody for their trust and confidence.

## **Invitation to stakeholders and thought leaders who form the inner circle of the discussion**

Dear thought leader,

It is a pleasure to invite you to take part in a collaborative session that takes .... hours and is divided into three phases:

- In Phase 1 you will share your perspective of the issue at hand and will listen to others express their own. We will facilitate the process so that nobody interrupts another, ensuring an open and respectful atmosphere. It may happen that you will be asked to leave the inner circle once you have expressed yourself, thereby giving another stakeholder an option to present their perspective.
- In Phase 2 we will jointly work towards a new common perspective that is new and emerges from the group. All you will have to do is to let go of your preconceived notions and join our journey of discovery.
- In Phase 3 the group (including *all* participants) will work towards concrete actions that can be prototyped, tested and potentially implemented immediately.

Come with an open mind and heart, and be prepared for a fun and deep session that hopefully sheds new light of how we can embrace this issue we all care so much about, *together*. I am at your disposal for further questions and look very much forward to working with you.

Katrin Muff for 50+20, June 2012