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## A meta-collaboratory

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The Globally Responsible Leadership Initiative<sup>1</sup>

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In this chapter we consider the evolution of the initial definition of the collaboratory within the 50+20 community by looking at two recent and ongoing initiatives of the Globally Responsible Leadership Initiative (GRLI).

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The two GRLI initiatives are both ongoing at the time of writing. The first describes how GRLI partner institutions in South Africa convened concerned stakeholders around the Western Cape wine region to develop an agenda of responsible action for that particular regional industry. The second initiative describes the convening and early activity of an innovation cohort of management educators focusing on the question of implementing 50+20 in their own institutions.

In closing, we suggest some points for consideration and investigation to further inform the initiation and development of future collaboratories.

1 The authors wish to thank Arnold Smit and Nick Ellerby for making valuable contributions through their review of this chapter.

## Defining 50+20 collaboratories

When the wording of the 50+20 Agenda was being finalized a term was sought that could describe the central and defining feature of the vision. The blend word “collaboratory” offered an appropriate portmanteau to fuse the key elements of “collaboration” and “laboratory” without making it exclusively about the one or the other.

The term suggested that new types of laboratories of research and learning are needed within management education, and that the basic conditions and requirements of what is generally understood by “laboratory” needed to be modified through the introduction of prerequisite collaborative elements or “collaboration.” A laboratory provides a safe space for experimentation where qualified professionals distil and verify truths or findings and explore their potential to enable innovation. Such an environment typically favors reductionist approaches investigating *how* something functions or exists, often by isolating and studying its component parts and ignoring mostly the question of *why* something functions or exists—purpose is mostly ignored. While the need for study, innovation and learning through experimentation in relative safety (laboratory) remains legitimate and needed, collaboration suggests that traditional scientific inquiry conducted exclusively by qualified researchers, concerned mostly with the inner workings and component parts at the expense of understanding the whole, is insufficient. The term “collaboratory” implies that scientific pursuit and the learning associated with that pursuit may not be confined to the inside of the symbolic laboratory and that research, education and innovation embedded at the coalface of the practical world, that is, societal issues, ought to be trialed. The collaboratory stretches into the space of transdisciplinarity, where scientific knowledge and method blend with real-life experience and wisdom—shared in the form of narrative. Mainstream scientific approaches and perspectives may sit less comfortably here. In the collaboratory learning is spurred when diversity of experience and knowledge is present, and the head, heart, hand, and will are engaged. Purpose and impact are fundamental to any collaboratory, and the presence of deeper emotions and sense-making is essential.

With the launch of the 50+20 Agenda during the Third Global Forum on Responsible Management Education, which took place as part of the

Rio+20 Earth Summit in 2012, the co-authoring group hosted and facilitated learning circles referred to as collaborative meetings, collaborative sessions or simply as collaboratories.<sup>2</sup> These were held in order to provide participants of the Third Global Forum a sampling of what management education for the world implies, and they also offered a tangible, visible, and ultimately complementary action to the launch of the written 50+20 Agenda.

### **Box 21.1** Fishbowl sessions

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Fishbowls involve a group of people seated in circle, having a conversation in full view of a larger group of listeners, and are useful for ventilating “hot topics” or sharing ideas or information from a variety of perspectives. In an “open” fishbowl chairs are open to “visitors” (i.e. members of the audience) who want to ask questions or make comments. Although largely self-organizing once the discussion gets underway, the fishbowl process usually has a facilitator or moderator.<sup>3</sup>

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The method employed to facilitate these sessions was similar to fishbowl sessions (see [Box 21.1](#)) or Open Space gatherings (see [Box 21.2](#)) that were also in use during some of the 50+20 visioning retreats that took place in the build-up to the Rio+20 Summit. The sessions at Rio+20 were well attended, offering well over 100 management educators an opportunity to participate actively in one of three facilitated learning circles on the issues of gender equality, corruption, and poverty. The Rio+20 collaboratories were well received and attracted encouraging feedback and positive comments.

These sessions set the tone for how participants, many of whom became future champions of 50+20, understood and interpreted the central element of the 50+20 vision. The term “collaboratory” became associated very closely with the particular style and format of learning and investigation that took place in Rio de Janeiro in 2012. Subsequent to the launch several participants at the time simulated these collaborative meetings in their own settings or institutions, simply referring to these meetings or events as “collaboratories.”

2 See: <http://50plus20.org/documentary>.

3 See: <http://www.kstoolkit.org/Fish+Bowl>.

## **Box 21.2** Open Space (also known as Open Space Technology or OST)

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OST is a method for convening groups around a specific question or task or importance and giving them responsibility for creating both their own agenda and experience. The facilitator's key task is to identify the question that brings people together, offer the simple process, then stand back and let participants do the work.

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The collaboratory meetings held at Rio+20 were a symbolic demonstration and enactment of the central philosophy of the vision. A fuller realization of the vision would see management educators assume their role in collaboratory development and hosting more completely. Ideally they would move beyond initiating and hosting one-off collaboratory meetings, to a future scenario where the institutions themselves become ongoing collaboratories-in-action and ultimately conveners and initiators of collaboratories.

Later described more fully by differentiating between “bolt on,” “built in,” and “platform” solutions (Muff 2013) using a three-order model of innovation, the positive response from management educators to the 50+20 call of developing collaboratories could range through these stages:

1. Initiate and facilitate one-off collaboratory meetings in and among traditional educational offerings. This may result in a series of collaboratory-based events that deal with a particular issue of relevance to that institution and its constituents
2. Active displacement of traditional learning and research initiatives with collaboratory-based programs of learning and research
3. A full transformation of the entire educational offering and operating model of a management education institution to become a collaboratory-in-action that shapes its work and ways of working around new and ongoing collaboratory investigations that in turn are identified and scoped through ongoing societal and environmental stakeholder engagement

The varying degrees or levels of collaboratory participation and engagement described, all satisfy (on the surface at least) the concise and

ambitious original 50+20 definition of a collaboratory as “an inclusive learning environment where action learning and action research meet” (Muff *et al.* 2013). It should, however, be understood that the core ingredients identified here are about fostering active collaboration among a diversified group of stakeholders, convened around a central issue or question, and working with whole person learning, creative, and systemic approaches to foster collective problem-solving and co-creation.

Through this chapter we propose examples of collaboratories in full knowledge that the concept is evolving. The 50+20 vision is meant to describe stretch goals—an aspirational state. Optimistically, these examples may also provide a starting point for theoretic purists to supply the collaboratory ideal with its epistemological and methodological foundations.

In the years since Rio+20, many of us who have experimented with the collaboratory method have come to realize that there may be more dimensions to collaboratories that we need to explore and understand. There are also lessons to be learned from earlier initiatives such as the GRLI, which has been modeling and refining aspects of the collaboratory since 2004.

## The GRLI partnership as collaboratory and container

Founded in 2004 the GRLI may be viewed as an early and continually evolving collaboratory prototype; 21 corporations and learning institutions were invited to join a one-year process of hands-on investigation into the question of what global responsibility implies from the perspective of their organizations. They had to be strategically committed, dedicated, and equipped to introduce new practices. The inquiry was facilitated on a peer-based and whole person learning basis as later articulated in *Learning for Tomorrow: Whole Person Learning for the Planetary Citizen* (Taylor 2007). The initiating GRLI partners formed what we now label a “collaboratory” with the open space meeting at INSEAD in April 2006, facilitated by Harrison Owen, kicking off GRLI as an enhanced global community of learning and action. It assembled then and still











to jointly build on insights developed through the 50+20 project and put the vision into action.

By the end of October the first intake of the 50+20 Innovation Cohort had been recruited and was preparing for their first meeting to take place at the University of St. Gallen in Switzerland. Each of the 18 participants representing 16 institutions prepared an overview on what they would like to contribute to the cohort and also gain from participation in the cohort. It was clear from the outset that this was a group of dedicated and committed change agents who were willing to engage fully in a process of co-learning and co-creation.

The cohort operates along the same guiding principles that inform other CoRAs and indeed the GRLI itself. From the outset it was agreed that the cohort's work would answer to the key dimensions of:

- **Result orientation.** Will it deliver visible results on the ground?
- **Long-term effects.** Will it live on and continuously affect the development of globally responsible leaders and practice?
- **Uniqueness.** Will it get things done that could not be achieved elsewhere?

Along with these criteria the cohort also agreed to undertake its work being mindful of the following:

- To encourage development through innovation with others
- To mobilize collective and individual potential
- To work with learning approaches that seek to offer both safety and freedom
- To prepare the self as an instrument of change (building on the “whole person learning” concept of GRLI and the Oasis School of Human Relations)

Underlying this approach is an acknowledgement and desire to develop globally responsible leadership and practice at individual, organizational and systemic levels—or put differently, through “I,” “we,” and “all of us.” The “I, we, all of us” phrasing and approach was first formulated by GRLI Chief Executive Mark Drewell, inspired by Don Beck's work on Spiral Dynamics. This concept also formed the basis for the three ellipses of the GRLI logo commissioned by Anders Aspling in 2006.

Within a day and half of the first cohort meeting the group self-organized into three working clusters. The clusters can be thought of as workstreams within the cohort through which participants, bringing diverse interests and strengths, may channel their energy and effort. Apart from the cohort delivering a practical or actionable output that builds on the 50+20 Agenda and vision, there are also three sub-projects driven by the clusters. The cohort also represents an explicit model of peer-based learning with all the challenges, dynamics and possibilities that such an approach shapes and demands. It is an ongoing experiment that calls for learning and development in each person, each grouping, the cohort as a whole and those facilitating the process.

Necessary phases within the effective development of the Innovation Cohort collaboratory appear to echo previous work by GRLI partners on what was termed “authentic collaboration” (Ellerby, Lockwood, Palin, Ralphs, and Taylor 2010), namely:

- Preparation and checking readiness
- Enabling authentic collaboration
- Working with the emergent challenges
- Reviewing the process

Each phase has subsets with related activities, and it is clear that while they may appear linear, it is in reality an iterative, challenging and dynamic process.

Six months after the final session the cohort will be invited to meet with the next 50+20 Innovation Cohort to support its development, to share experiences, build networks and reflect on learning and progress.

## Conclusions

Informal discussions with Rio+20 collaboratory participants and participants of subsequent one-off collaboratory meetings confirmed that participation in itself was experienced as impactful or powerful and generally helped awake a sense of purpose and urgency among participants to deal with the central issue. However, many of the individual participants were left with the impression that the collaboratory refers

merely to the one-off meeting and the particular style of facilitation used. Those participating in a sequence of meetings experienced raised value and learning both as individuals and for their organization—and a pronounced appetite for continued learning and development of the collaboratory.

It is important to emphasize that a meeting in itself and the facilitation style employed is only one practical and visible act of transforming management education. The ultimately goal should be to transform our institutions and the management education industry to fully emulate the collaboratory approach in all its work—individually and institutionally.

Hosting an event or participating in a collaboratory-style meeting could, and hopefully does, signify the start of an involved process of organizational and personal inquiry into a particular issue and way of working, a process that is not only issue-centered but ultimately also demands some transformation on the part of the actors involved. And perhaps this is where both the original definition and some of the current perspectives on the meaning of collaboratory ought to be elaborated on. Should we more fully acknowledge and explicitly state the need for individual and organizational transformation through the process of continued contribution in a collaboratory setting?

First-hand enactment of the vision through participation in a session has the potential to open new perspectives on the role of institutions and individuals in solving real-world issues, even beyond the immediate research and educational interest or relevance of such issues. It appears to surface and recognize an explicit ethical dimension to the purpose of research and educational activities. This suggests to many the need for some form of “internal” work at individual and institutional level. Differently put, there is work to do at the “I” level as well as the “we” level in order to affect change at the systemic “all of us” level. Sparking action and specifically responsible action at the “me” level seems to be a critical requirement for a successful collaboratory.

In hindsight the Western Cape Wine Collaboratory had no visible and agreed mechanism in place to keep the group accountable to the actions it generated. Delegating emerging actions to smaller working groups ensured a minimum amount of momentum and responsibility at the “I” and “we” level. The group as a whole did not commit to continued development of the shared agenda, or collective and continued development

of their individual and organizational roles in the system, and as a result this collaboratory quickly ran out of steam.

On the positive side—the level of interest shown when the Wine Collaboratory was first announced, and the speed at which seats were confirmed, far exceeded the expectations of the conveners. The positive response was an indication that participants were drawn to the urgency and content of the call, but also to the innovative nature of the process as described. Immediate feedback on the process was that participants experienced it as unique and radically innovative. It proved in a real-world setting that it is possible to work together on common ground with individuals and organizations with a commitment beyond responsibility to themselves and serving the common good.

Since the Wine Collaboratory was not concerned with transforming management education it may be added here that the essence of the 50+20 vision appears to carry meaning and relevance beyond the immediate management education fraternity. Informal discussions with faculties of Law, Engineering, and Natural Science (to name a few from the higher education landscape) and direct participation from those areas in collaboratory events, confirmed how they equally own the urgency to respond to the 50+20 call—to develop responsible leaders, to enable organizations to serve the common good, and to engage more broadly and vigorously in transforming our societies and economies towards inclusive modes of being and operating.

At a minimum it appears that the degree of inclusivity required of the collaboratory, from an early agenda-setting phase through to eventual societal impact having materialized, needs to reach even further beyond the immediate and obvious stakeholders. A level of openness is required of individual and institutional participants alike, to the possibility and often necessity of transforming their own views and practice through active contribution in the collaboratory process.

These suggestions are based in part on early stage observations and come less than a year since the full 50+20 vision was published in book form as *Management Education for the World* (Muff *et al.* 2013). However it also draws on ten years of work done within and through the GRLI. Learnings from the GRLI and initiatives like the ones presented above, along with preliminary insights drawn from informal discussion as referred to earlier, hopefully serve to enrich and ultimately progress

both our theoretical understanding and our practice of convening and hosting collaboratories.

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