SOCIETAL TRANSFORMATION LAB

JOURNEY OVERVIEW

WELCOME

Welcome to the Societal Transformation Lab!

We are really excited to have you on board for this journey.

An inspiring number of leaders and changemakers like yourselves have responded to our invitation to apply for this Lab. We originally expected to convene 100 teams for this inaugural cohort – but after receiving so many high quality applications, it became clear that we needed to include a much larger cohort. Today, you're joining an emerging community of ***over 300 teams*** from around the world, from the Philippines, Indonesia, Uganda, Argentina, countries across Europe, the U.S, Canada, Australia, Japan, India and dozens more.

Some teams come from well-known international organizations. Others are made up of pioneering citizens, students and local organizers. All are working to advance initiatives that range from establishing local circular economies to advancing our democracies, reconnecting business with purpose, to whole-child education models, more sustainable ways of stewarding land - just to name a few.

Having reviewed your application videos, what is clear is that we share diverse backgrounds and a distinct sense of possibility that by working together we can bring about new ways of organizing our communities, institutions and larger social systems such that they support and enhance the wellbeing of all.

What You Will Find In This Letter

The purpose of this letter is to provide you with more detailed information about the following:

- What actually is the Societal Transformation Lab?
- Why is the Presencing Institute offering it?
- What do we need to know now, before the journey begins?
- What are the key dates for the Lab in 2019?
- Generally, what will happen from January to May 2019?
- What are the main elements of the Lab?
- What time commitment can we expect?
- How do we prepare for the local, in-person aspects of the Lab that our team will host?

This letter is just a starting point. We will send you a more detailed syllabus for the Lab in early January. If you have specific questions that aren't answered in this document, don't hesitate to reach out. We will do our best to respond promptly, but if we don't respond immediately, just keep in mind that we're a small team supporting a wonderfully large community of participants. Contact: Adam Yukelson (yukelson@presencing.com)

On behalf of the STL Team, Adam

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Basics

Introduction

The Societal Transformation Lab[1] convenes **teams** who are working to bridge the environmental, social and spiritual divides of our time. It is designed to put you in the driver's seat of change. The resources and facilitation support we will provide through our online platform, and the spaces for dialogue with your peers, will help you to:

- **Understand** the deeper forces at play in social systems that can either be obstacles or leverage points for change
- **Identify** emerging future possibilities in your work
- **Prototype** new ways of working together in multi-stakeholder settings

The Presencing Institute will facilitate this process by training your core team (see the section on Key Lab Elements & Definitions for more detail) to use systems mapping tools, sensemaking methods and embodiment practices and apply them to the issue / prototype you've brought into the Lab.

You will also be invited to participate in global action-learning dialogues through our online platform, where you can connect with other leaders around the world and learn how awareness-based change methodologies are being applied to real societal challenges.

Why the Presencing Institute is Offering STL

Part of the Presencing Institute's mission is to offer a new narrative for profound evolutionary change in society. For two decades, our work has explored questions such as: what does it take to redesign societies in ways that address the pressing challenges of our time? What does it take to apply the power of mindfulness to the transformation of the collective system? Leading from the Emerging Future and The Essentials of Theory U outline a framework for updating the "operating systems" of our educational institutions, our economies, and our democracies, applying the core concepts of Theory U to the transformation of society at large.

We believe true leadership today is the capacity to facilitate a shift of mindset in multi-stakeholder groups from a narrow understanding of self-interest (ego-systemic) to one that makes decisions based on the wellbeing of the whole system (eco-systemic). We call this capacity Eco-System Leadership. The Societal Transformation Lab aims to build this type of leadership capacity at scale, across multiple sectors and geographies. Ultimately, the aim of STL is to activate a global ecosystem of innovation that works to ensure wellbeing for all.

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[1] *Going forward we're going to refer to it as **STL**, rather than s.lab*

Pre-Requisites

The Lab will jump directly into more advanced presencing practices. All participants are therefore expected to know the basics of Theory U, as introduced in u.lab 0x and u.lab 1x, prior to beginning the STL journey in January. For those who would like a refresher, we recommend completing u.lab 0x (which takes about two hours). We strongly encourage **all core teams members** to read The Essentials of Theory U (2018) prior to beginning the STL journey.

The STL Team

Bios for team members are available here on the Presencing Institute website.

Core Team

Otto Scharmer

Adam Yukelson

Florentina Bajraktari

Mercedes Bidart

Antoinette Klatzky

Extended Team

Angela Baldini

Arawana Hayashi

Kelvy Bird

Olaf Baldini

Rachel Hentsch

Simoon Fransen

Journey Overview

Here is a high-level overview of what will happen when during the Societal Transformation Lab. Use this timeline to begin preparing for the journey ahead, which begins in mid-January. We will send you a more detailed syllabus in early January.

*Note: Please refer to the section at the end on **Key Lab Elements & Definitions** for descriptions of what various lab elements mean.*

One important distinction to note up front is the relationship between core teams and extended teams:

Core Team

That's you! The group of participants who took initiative to apply to STL. This group will learn various Theory U based methods and applying them locally (in your own context) to the issue / challenge / prototype you are bringing to the Lab. You're responsible for holding space and facilitating the process for the extended team.

Extended Team

This is an extended group of stakeholders in your project / initiative, who you should begin reaching out to now, that will participate in the the Lab process with your core team. Between your core and extended teams, you should have a minimum of 7-10 people participating in STL together. To elaborate on why we have this requirement: the STL methods are designed to create a shared language and understanding of the intellectual and emotional complexity in stakeholder relationships. Because they are multi-stakeholder transformation methods, they typically require a minimum of about 7-10 participants to be together in-person. Therefore, core teams are asked to convene an extended team of stakeholders who will participate in some (or if they wish, all) of the STL journey.

Generally, teams need to be co-located or able to meet in person at minimum once per month. That being said, the ideal scenario is to have a regular weekly team time that is either being used for the monthly global live-sessions and zoom coaching calls (as specified below) or, during the off weeks, for the respective local practices of the month. It is okay to have one or two virtual team members, but generally, people will need to be together in person to fully participate in the STL methods.

December 2018

- Core teams should continue their outreach to potential **extended team** members.
  Important: *by mid-January, you will need to have assembled a team of minimum 7-10 people (including core and extended).*
  Use this syllabus to understand and communicate benefits of participating and likely time commitments.

- Use this time to refresh yourself on Theory U basics by taking u.lab 0x and reading The Essentials of Theory U.

January 2019

JAN 14 2019 | JAN 17 2019 | JAN 24 2019

- The January module focuses on helping your core team to co-initiate and prepare for the journey ahead. The January orientation sessions are designed to offer guidance for your core team on three essential parts of Co-Initiating:
  - How to build a strong container for your core team
  - How to clarify and refine your team's shared intention
  - How to ensure the right stakeholders (**extended team**) have been invited to participate in the journey.
- The January sessions will also provide an **orientation** to the platform where you'll find all the STL resources, including: course material, societal transformation issue areas, team spaces, and whole-Lab conversation spaces.
- General Timeline:
  - **January 14th:** Invitations to join The Societal Transformation Lab on Mighty Networks (the platform we will use to host STL. We will refer to this below as the STL Platform) will be sent out to each member of your core team, along with instructions for how to set up your team's space on the platform.
  - **January 17th, 10am-11:30am ET:** Zoom Session: Co-Initiating basics Part 1.
    All members of your core team should participate (to the degree possible).
    Teams can meet virtually (no in-person gathering required).
  - **January 24th, 10am-11:30am ET:** Zoom Session: Co-Initiating basics Part 2.
    All members of your core team should participate (to the degree possible).
    Teams can meet virtually (no in-person gathering required).

February 2019

FEB 7 2019 | FEB 11 2019 | FEB 14 2019 | FEB 15 2019 | FEB 28 2019

- The February module focuses on the actual launch with the full (core + extended) team. It includes an introduction to how we think about creating profound change in social ecosystems from a Theory U perspective. **The emphasis is on seeing from deeper levels of the iceberg**. In this first phase of co-sensing, participants will apply co-sensing methods to their own initiative. This involves mapping out the system and going to the edges of the system to gather the key observations and insights. These practices establish a better understanding of how all the stakeholders experience the current situation - particularly the ones that are most marginalized, who we often know the least about. Through this module participants will learn new ways of perceiving blockages, needs and opportunities in their stakeholder systems, using various levels of systems-thinking analysis: from symptoms down to the deeper root issues at play.

- **February 7th:** Launch of February methodologies on STL platform. Core team members should review this material. Optional for extended team members.

- **February 11th:** Live chat on STL platform throughout the day. Purpose: Q&A about methodologies and final preparation for hosting on 14th. Core team members & interested extended team members can join.

- **February 14th, 10am-11am ET:** Live Session. Core and extended teams gather locally for half-day, STL team demonstrates February methodologies (2D & 3D mapping - we'll define and explain what these practices are in late January / early February). After the live session the core team facilitates these methods locally with extended team. STL team will also outline sensemaking activities that teams should do between here and the March live session.

- **February 15th:** Live chat on STL platform, throughout the day. Purpose: follow up Q&A from live session / local half-day gatherings. Core team members & interested extended team members can join.

- **February 15th - March 6th:** meet locally and conduct learning journeys and/or stakeholder interviews.

- **February 28th, 10am-11:30am ET:** Zoom session. Cross-cohort sharing and sensing – support in implementation of practices. Core team members & interested extended team members can join.

March 2019

MAR 7 2019 | MAR 11 2019 | MAR 14 2019 | MAR 15 2019 | MAR 28 2019

- In March, your whole team will come back together for a deep dive that focuses on sensemaking from the variety of observations that people gathered in February. For sensemaking, there are a variety of methodologies at our disposal, including scenario thinking, systems thinking and Social Presencing Theater (SPT). In this session we are going to use 4D mapping (a powerful SPT practice).

- **March 7th:** Launch of March methodologies on STL platform. Core team members should review this material. Optional for extended team members.

- **March 11th:** Live chat on STL platform, throughout the day. Purpose: Q&A about methodologies and final preparation for hosting on 14th. Core team members & interested extended team members can join.

- **March 14th, 10am-11am ET:** Live Session. Core and extended teams gather locally for half-day, STL team demonstrates March methodologies (4D mapping), after the live session the core team facilitates these methods locally with extended team.

- **March 15th:** Live chat on STL platform, throughout the day. Purpose: follow up Q&A from live session / local half-day gatherings. Core team members & interested extended team members can join.

- **March 15th - April 10th:** meet locally to crystallize core insights from 4D mapping. If possible, try and maintain a weekly in-person meeting with your core team.

- **March 28th, 10am-11:30am ET:** Zoom session. Cross-cohort sharing and sensing – support in implementation of practices. Core team members & interested extended team members can join.

April 2019

APR 4 2019 | APR 8 2019 | APR 11 2019 | APR 12 2019 | APR 25 2019

- In the April prototyping module, participants will evolve and crystallize their initial idea based on the sensing activities and the 4D mapping of the previous month. Then they will design and explore their prototype ideas by doing, taking concrete actions that generate feedback from relevant stakeholders.

- **April 4th:** Launch of April methodologies on STL platform. Core team members should review this material. Optional for extended team members.

- **April 8th:** Live chat on STL platform, throughout the day. Purpose: Q&A about methodologies and final preparation for hosting on 11th. Core team members & interested extended team members can join.

- **April 11th, 10am-11am ET:** Live Session. Core and extended teams gather locally for half-day, STL team demonstrates April prototyping methodologies, after the live session the core team facilitates these methods locally with extended team.

- **April 12th:** Live chat on STL platform, throughout the day. Purpose: follow up Q&A from live session / local half-day gatherings. Core team members & interested extended team members can join.

- **April 12th - May 9th:** meet locally to conduct prototype experiments. If possible, try and maintain a weekly in-person meeting with your core team.

- **April 25th, 10am-11:30am ET:** Zoom session. Cross-cohort sharing and sensing – support in implementation of practices. Core team members & interested extended team members can join.

May 2019

MAY 2 2019 | MAY 6 2019 | MAY 9 2019 | MAY 10 2019 | MAY 23 2019 | MAY 30 2019

- In the May module, we'll focus on prototype refinement, knowledge capture and narrative creation – how to tell the story of what's emerging within and across teams in a way that builds momentum, engages even wider circles of stakeholders and accelerates the global movement we're working to bring into the mainstream.

- **May 2nd:** Launch of May methodologies, knowledge capture and storytelling tools on STL platform. Core team members should review this material. Optional for extended team members.

- **May 6th:** Live chat on STL platform, throughout the day. Purpose: Q&A about methodologies and final preparation for hosting on 9th. Core team members & interested extended team members can join.

- **May 9th, 10am-11am ET:** Live Session. Core and extended teams gather locally for half-day, STL team demonstrates May methodologies, after the live session the core team facilitates these methods locally with extended team.

- **May 10th:** Live chat on STL platform, throughout the day. Purpose: follow up Q&A from live session / local half-day gatherings. Core team members & interested extended team members can join.

- **May 10th onward** (as needed): meet locally to refine prototypes, capture knowledge and work on narrative creation locally.

- **May 23rd, 10am-11:30am ET:** Zoom session. Cross-cohort sharing and sensing – support in implementation of practices. Core team members & interested extended team members can join.

- **May 30th:** Update and upload your stories on platform to amplify global impact.

Early June 2019

- Closing activities for STL - dates and specific activities still to be determined, but regardless, time commitment and activities will be minimal.

Logistics

In-Person Requirements

Core and extended teams should gather in-person **at minimum** once a month to apply the STL methodologies together. We recommend that this gathering take place on the day of each Live Session (see detail in the Key Lab Elements & Definitions section). If your team cannot gather that day, you are welcome to gather and use a recording of the live session. If possible, we recommend that teams meet **on a weekly basis** for the various activities of the Lab (outlined in the Journey Overview section above). We recommend Thursdays to accommodate the various live and zoom sessions, but you can also meet on another weekday (and use the recorded version of the live-session). It is okay to have one or two virtual team members – just make sure that they can join the sessions via video-conference whenever possible.

You may be wondering:
why are we requiring in-person gatherings?

As mentioned in the Key Lab Elements & Definitions section below, the STL methods are designed to create a shared language and understanding of the intellectual and emotional complexity in stakeholder relationships. They are multi-stakeholder transformation methods that involve making systems maps out of physical materials and using embodiment practices (social presencing theater) to explore the evolution from current reality to emerging future possibilties. For these reasons, they cannot be done virtually.

Time Commitments

Core Team

On average, core team members can expect to commit 4-5 hours per week toward the Societal Transformation Lab. While this is an average estimate, those hours may not be evenly distributed throughout a month. Weeks in which teams are engaged in applying methodologies will require more time, while other weeks will require less. In addition, the overall commitment will likely be slightly less from March to May.

Extended Team

On average, extended team members can expect to commit 2-3 hours per week toward the Societal Transformation Lab. The same variability described above for the core teams applies to extended teamx. The overall commitment will likely be slightly less from March to May.

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Hosting Logistics

SPACE

Now is a good time to ensure your team has a suitable space to meet once per month. A suitable space typically consists of:

- **A reliable internet connection** and large screen on which to watch live sessions
- **Physical space without fixed chairs and tables.** You will need to move furniture around in order to facilitate some of the practices. As a good rule, you'll want enough space for a group of 15 people to sit comfortably in a circle.
- **Good natural light** (when possible)
- **Generally quiet**, without outside interruptions

FINANCES

While participation in STL is free for teams, teams are fully responsible for all costs incurred from their participation in the Societal Transformation Lab.

Intellectual Property

We're aware that you may have questions about the use of the Presencing Institute logo, intellectual property and other related considerations. We will provide further information on the more common legal and logistical questions in January 2019.

Key Lab Elements & Definitions

We will use a lot of new terminology during the lab, so the following definitions and lab elements will be useful to help you get oriented.

Acupuncture Points:
When you applied to the Societal Transformation Lab, you applied to a particular issue area (what we refer to as acupuncture points). Teams across tracks will all have access to the same methods, tools and Lab processes. On the STL platform, you'll find specific topic areas related to the acupuncture point(s) most relevant to your prototype. In parallel to the methods and tools we offer each month, we'll use these spaces to surface what teams are learning about creating change in these specific issue areas around the world.

Convener:
In some cases, a person or team from an organization or network is helping to mobilize multiple teams to join STL. We call these people conveners. They may or may not participate in the full STL journey, depending on their availability and interests.

Core Team:
That's you! The group of participants who took initiative to apply to STL. This group will learn various Theory U based methods and applying them locally (in your own context) to the issue / challenge / prototype you are bringing to the Lab.

Extended Team:
The STL methods are designed to create a shared language and understanding of the intellectual and emotional complexity in stakeholder relationships. Because they are multi-stakeholder transformation methods, they typically require a minimum of *7-10* participants to be together in-person. Therefore, core teams are asked to convene an extended team of stakeholders who will participate in some (or if they wish, all) of the STL journey.

Live Chat:
Mighty Networks offers a "live chat" feature, which the STL team will use in the fashion of a Reddit "Ask Me Anything" (AMA) during the days leading up to and after a Live Session to answer questions from the STL community.

Live Session:
The heart of the STL process, Live Sessions are monthly hour-long broadcasts that bring together the entire Societal Transformation Lab worldwide, in real time. They will typically take place the second Thursday of each month. Core & extended teams are encouraged to organize half-day working sessions centered around these broadcasts. During these sessions, the STL team will demonstrate how to facilitate the key practices of the month. After the session, teams will facilitate that process locally. Unable to gathering during a live session? Not to worry. A recording will always be available so that teams in places like Australia don't have to gather in the middle of the night.

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» Key Lab Elements & Definitions

STL Course:
Within the STL platform (on Mighty Networks), we'll offer a "Course" – but you can think of it more as a series of lessons designed as a toolkit to help you learn and apply the Theory U-based methods we'll offer in the Lab.

STL Platform:
Your go-to place for all Lab resources, and the place you'll find and interact with other participants from around the world. The Lab will be hosted on Mighty Networks. We will invite you to the STL space on Mighty Networks once it's ready for launch in January. For now, it would be a good idea to take some time to familiarize yourself with how Mighty Networks works.

STL Team:
a small team of facilitators from the Presencing Institute who have designed and will facilitate the Societal Transformation Lab.

Zoom Session:
Using Zoom, core team members (and interested extended team members) will have the opportunity to join monthly, interactive video conversations to share challenges and learnings across teams and across issue areas. These sessions will typically take place last Thursday of each month.

What's Next?

We're so excited that your team is joining the Societal Transformation Lab. Be sure to review the timeline above – especially for December – to clarify your team's next steps. You can expect another update from us in early January. Also in January, we'll send you an invitation to join the STL platform on Mighty Networks.

Until January!

The STL Team