u.lab 2x
Accelerator for Systems Transformation

Source Book

2021

A Field Manual for Teams to Move Their Intention from Idea to Prototype
Welcome!

This workbook was created to help you design and facilitate your u.lab 2x journey. Here you will find:

- An overview of the entire u.lab 2x journey
- Facilitation guidelines for each stage in the process
- Method and workshop guidelines for each of the core exercises
- Guidance on creating your narrative and sharing your story

Enjoy this u.lab 2x Source Book!

– u.lab 2x Team
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Source Book - General Information

The u.lab 2x materials are made available from the beginning of the course, so you can plan your journey over the next four months. All of the methodologies and suggested workshop structures are posted in Sutra. We realize that many participants will find it convenient to have these key u.lab 2x materials available in a single PDF as well, and therefore have created this document.

Course Structure

U.lab 2x is organized into four 4-week practice modules; your team will bookend these with a co-initiating phase at the start and a co-evolving phase at the end. Each module focuses on a particular tool that forms the basis for a workshop or practice. It is the role of the Core Team to review the materials, prepare the monthly workshop/activity, and facilitate the process for the Core and Extended Teams. Modules launch with a Live Session on Zoom, followed by an ‘Ask-Us-Anything’ Office Hour two weeks later.

In this Source Book, we suggest a design and timeframe for each module. Our recommendation, wherever possible, is to facilitate a process that brings the core team together weekly or bi-weekly, and the extended team together monthly. This gives the team the opportunity to clarify intention, roles and tasks; reflect on learning; crystallize insights and design; and execute and iterate prototypes. In the Co-Sensing I, Presencing, and Crystallizing & Prototyping modules, the Core Team should plan, prepare and facilitate a half-day workshop for the Extended Team using the methodologies provided; we suggest meeting with your Extended Team at least once a month. However, we know that some teams opt for a different rhythm of meetings and workshops, for example, integrating all the practices into a single gathering with their Extended Team over 1-3 days. We encourage you to adapt the process so it best aligns with your context.

Social Distancing

The core practices that make up each module work both in-person and online. In the workshop descriptions, videos and practice examples below, you will find guidance and suggestions for both formats. If you find yourself innovating to meet the needs of your particular context, please tell us about it!

If you have questions about the Source Book, you can always post them to Sutra—or you can email the u.lab 2x team at u.lab@presencing.com.
Co-Initiating

The starting point of the U process is Co-Initiating. For your core team, there are 5 essential parts of Co-Initiating on which to focus:

1. Clarify the Core Team and Its Role  
2. Define and invite your extended team  
3. Build a container for your core and extended team  
4. Co-initiate a diverse team that inspires a common intention  
5. Harvest insights form the journey

Clarify the Core Team and Its Role

Who is the core team? That's you! The group of participants who took the initiative to apply to u.lab 2x. This group will learn various Theory U based methods and apply them locally (in your own context) to the issue / challenge / prototype you are bringing to u.lab 2x. You’re responsible for holding space and facilitating the process for the extended team. In a nutshell, the core team is the 2-4 people who initiate and take responsibility for leading a larger team through the u.lab 2x journey.
Define and Invite the Extended Team

The Extended team is a diverse group of 5-15 people. This is a group of stakeholders in your project / initiative, who will participate in the u.lab 2x process with your core team. Between your core and extended teams, you should have a minimum of 7-10 people participating in u.lab 2x together. To elaborate on why we have this requirement: the u.lab 2x 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 or online. Therefore, core teams are asked to convene an extended team of stakeholders who will participate in some (or if they wish, all) of the u.lab 2x journey.

Think about including:

1. **Executive sponsors and key decision-makers** who have a deep professional and personal interest in exploring and shaping the opportunity.
2. **Activists**: people who would give life and soul to make it work. Without this personal passion and commitment, nothing radically new will ever come into being.
3. **People with little or no voice in the current system**: patients in the case of health care, students in the case of schools or universities, customers or NGOs in the case of business organizations, future participants in the case of a leadership development project.
4. **Key knowledge suppliers** to the degree necessary to build a support team and infrastructure (helper/consultant, internal or external).

Now you can craft an invitation with intention and clarity. Think about the reason you are including them and articulate it clearly in the invitation.

Build a Container

Collaboration

Working with a team can bring up dynamics, as group members may have different working styles and ways of contributing. During the co-initiation phase, perhaps think about what each team member is bringing to the table and how you can utilize the various qualities each person is bringing. Everyone has a contribution to make. Work to stay attuned to the aspiration and intention, especially when moving into the prototyping phase. Many groups set up community or working agreements to help create the conditions for generative team work.

Preparing to Hold Space

The way we show up is affected by our internal space. The same way that you might care for the logistics of the physical space, think about: what do you need to do to prepare yourself? Reminder: “The success of an intervention lies in the interior condition of the intervenor” Bill O’Brien (via Theory U, Otto Scharmer)
Individual practice:

- Attend to your Levels of Listening (video #7)
- Continue your own daily practice (examples include: journaling, meditation, walking in nature, etc)

Additional tips and resources for facilitating a process for your teams:

- Reminder: Open Mind, Open Heart, Open Will
- Create spaces (physical and mental/emotional) for new connections
- Be open to feedback & new ideas
- Stay grounded and centered - come back to your breath or take a pause when needed
- Lean into discomfort - try something new - role model it for others in your team

On Circle

We encourage meeting in circle - whether small circles if convening a large group or one large circle with your whole group. Circle encourages a shared conversation rather than a leader at the front of the room. “Circle is democratic space where we can look each other in the eye, lean in and listen, and include all voices with a sense of equality. The practice of circle often leads to more creative options, wiser decisions, clearer actions.” ~ The Circle Way, Christina Baldwin and Ann Linnea

Elements you may want to include in your circle (from the Circle Way):

- People face each other and every voice is considered contributory.
- Agreements of participation and respect are articulated.
- Conversation is viewed as a practice set apart from casual social interaction.

*In the case of online gathering, this still holds true. Encourage participants to keep their video on during the gathering (bandwidth permitting). If the group is smaller, begin with a short check in “going around the circle” so each person’s voice is heard. For larger groups, you can do a visualisation exercise and take a minute to mention each member and imagine the team sitting together in circle.

Co-Initiate a Diverse Team

The essence of Co-Initiating is to convene a constellation of players that need one another to take action and to move forward. You need the right folks at the right time and in the right place. The opposite of Co-Initiation is marketing: getting people to "buy in" to your idea. Part of the art of convening these stakeholders is to loosen your grip on the initiative idea - without necessarily giving it up. You lead by painting a picture that is intentionally incomplete; you make a few strokes; and you leave lots of blank space where others can add their contribution. In this way you shift the power dynamics from ownership to belonging, to seeing your part in a larger social field or whole.

Team Practice: Here are a few tips for co-initiating or sparking common intention among diverse core players:

1. Cultivate an intention to serve the evolution of the whole ecosystem of stakeholders in the system you’re working to change.
2. Trust your “heart’s intelligence” when connecting with people or exploring possibilities that may seem unrelated to the strategic issue at hand. Be open to other ways of framing the problem or opportunity (different key stakeholders will emphasize different aspects and variables).

3. Connect with people professionally and personally: try to connect with their highest future sense of purpose (Self and Work), not just with their institutional role and responsibility.

Here is a checklist for a kickoff event that brings key players together. To create commitment, clarify:

- **What**: What you want to create.
- **Why**: Why it matters.
- **How**: The process that will get you there.
- **Who**: The roles and responsibilities of the players involved.
- **When, where**: The road map forward.

Additional goals:

- To uncover common ground by sharing the context and story that brought us here.
- To spark inspiration for the future that the team wants to create.
- To use “mini-training” in dialogue interviews and learning journey best practices.
- To plan the action for stakeholder interviews and learning journeys by identifying core people, organizations, and contexts that need to be explored and contacted (a target list of the places of most potential).

The principles and practices above are all adapted from *Theory U* (second edition). Please refer to the book for more information.

**Harvesting**

We recommend that your team documents your journey throughout the process, for instance by taking photos, making videos, capturing testimonials, writing, drawing, etc. This will help you create an extremely rich learning field as it will allow you to deepen your reflection and potentially surface insights that would otherwise not emerge. Moreover, it can help you ground the process, align your team, further clarify your intention and enhance your learning. Finally, it can be used as raw material for crafting your story and making it visible to others—from your local community to potential funders.

If you think you might be interested in getting your u.lab 2x story out in the world, we have put together some suggestions to help you do so. We recommend you refer to the Storytelling section at the end of this source book to get started early on and set your team up for meaningful storytelling. As we move through the u.lab 2x process, you will find further guidance and be able to engage with others around Storytelling on Sutra.
Co-Sensing I: 3D Mapping

In the co-sensing module your team begins mapping and co-sensing the system you are collectively trying to change through your initiative.

Use the methods and guidelines below to co-create a 3D model of the system in question. After creating the model, you go out into the real world—to the edges of the system—to gather the key observations and insights.

Learning Objectives

During this module you will establish a better shared understanding of how all stakeholders experience current reality - but in particular, the ones who are most marginalized or excluded from conversations about changes that will impact them.

By the end of this module, your team will generate:

1. New ways of perceiving blockages, needs and opportunities in your stakeholder systems.
2. A map of the systemic barriers that keep the system on its current track.
3. A revised set of driving forces that shape the system you are collectively trying to change, along with core questions and insights into opportunities related to each of them.

Through the co-sensing experience, you'll further establish a team that is "switched on" to sensing profound opportunities, who have an improved capacity for building generative stakeholder relationships.
Designing and Facilitating a Half-Day Workshop

Bring your team together for a half-day workshop. You will facilitate a U-based practice called 3D mapping that will generate a deeper understanding of the current reality you're facing, integrating multiple perspectives and dimensions.

This workshop will require approximately 4 hours —depending on group size—with your core and extended team group members. Here is a suggested workshop plan to help you facilitate this process. Please keep in mind that these times are a guideline and we invite you to tailor and design your sessions to best fit your own context.

**Preparation**

1. Review the Logistics information (below)
3. If your team is meeting virtually, there are different ways to approach 3D mapping. Below is an example of a graphic version: [https://app.gitbook.com/@andre-vashist/s/u-lab-london/u.lab-2020/ulab2020/april-30-3d-modeling](https://app.gitbook.com/@andre-vashist/s/u-lab-london/u.lab-2020/ulab2020/april-30-3d-modeling)
   Other teams work with a physical structure, assigning one member of the team to place items and create the 3D map. We will share more examples in the Co-Sensing I course materials on Sutra to help you design an approach that works for your team and context.
4. In preparation, invite each participant to bring a picture or object (physical) that represents, in their personal view, the current state of the system that you collectively are trying to change.

**People & Place**

3D Mapping teams ideally consist of 5-8 people. For larger groups, this will mean multiple groups work on their 3D map at the same time.

**Logistics**

This section gives an overview of all the logistics you will need to consider and prepare for your workshop.

If you are meeting in-person, be sure to prepare:

**Meeting Room**

- Circle of chairs/seating arrangement
- Natural light if possible
- Plants/Flowers or something that brings nature into the space
- Access to water (tea/coffee/snacks if possible!)

**Welcome / Registration Table**

- Name tags (if possible no plastic, no metal → paper and cotton string works fine)
- Journals
- List of participants (name, organization)
- Agenda for the day
- Provide pens for those who need them
- Coffee, tea, water plus a little snack at welcome / registration

**Required Materials for 3D mapping**

- A workspace for each group
- A small glass with a selection of crayons to draw on the papers
- Flip chart easels
- Broad-tip markers for writing on flipcharts
- Flip-chart paper to set as tablecloths and use as paper
- Journals with blank pages
- 3D Mapping Kits for each group of 5-8 participants, each ideally in paper or cotton bag. The items in the Kits will be used to represent different aspects of the system. We encourage you to source the kits sustainably, using materials that you already have. Examples of items you could include in your kit are:
  - Pipe cleaners in different colors
  - A handful of pinecones, small twigs or other items easily found outdoors
play dough or sculpting material

a handful of pebble stones

wool, string, pieces of material

small figurines or toys, keys, LEGO, or other small items

Online gathering preparation

- Make sure that your zoom account is updated and ask participants to update their accounts before the workshop
- If possible, practice your chosen method for virtual 3D mapping (in ‘mini’ form) ahead of time
- Allocate a couple of teammates who will lead the process and one or two to be technical support
- Make sure those leading the process have all of the material they need and an adequate, visible space in which to work
- It is helpful to send a description of the workshop to your participants ahead of time
- Let participants know it is best if they can avoid joining via mobile devices. Recommend that they attend the meeting via a computer instead, with a headset for better communication

Workshop Structure

Here is a suggested workshop structure to help you plan and facilitate this process. As you invite all team members to attend the first workshop, please remind everyone to bring an object that represents the current state of the system you are trying to change. They might also want to bring their own journal, pen and water bottle.

Opening (90 minutes)

Start with a check-in with everyone sitting in a circle. Be sure to have set up the circle of chairs or seats in advance, arranged so that everyone in the group can see each other. If you are meeting virtually, take a minute to visualize sitting in a circle before beginning the check in.

- Welcome everyone, then frame the overview of your upcoming journey together without getting too much into detail (which can be covered later).
- As the facilitator, you can demo the following check-in structure:
  - Check-in with your name, context and your object that represents your view of the current system that you are trying to change (put the objects into the center of the circle)
  - Allow 3-5 min for each person to share (dependent on group size). You will need to adjust the time allotments to ensure you save enough time for the other activities that you will lead prior to the live session.
- Once everyone has spoken, one Core Team Member can prompt: What are we noticing? Share any observations - are there interesting differences or patterns? (keep this part of the conversation short)
- Break into small groups of 3-4 people. Each group will create one flip chart (in person) or text to add to the zoom chat (virtual) with:
- Intention statement for the team
- List of external stakeholders (feel free to name or draw these external stakeholders) that need to be involved one way or another for your work to succeed

- View one another’s intention statements and lists, either by wandering around the room viewing the small groups’ flip charts or by sharing the statements and lists in the Zoom chat.
3D Mapping

3D Mapping is a tool we use to bring multiple dimensions and perspectives to see and understand the elements of the system together (co-sensing). In the context of Theory U, we can use modeling at any phase to create visual displays that share projects and engage potential stakeholders. During this modeling process, the entire team will create one (or several, depending on group size) 3D Map(s) of the current reality and of the future that you are trying to create.

*Credit to Cliff Barry and The Ashland Institute for developing the Leadership Archetypes used in this practice. The following version includes revisions and improvements added by u.lab participant Gwendolyn Hallsmith.*

**Roles**
- One Facilitator/Scribe from the core team
- 5-8 people max per-group as 3D Modelers (including facilitator).

**Process**

**Part I: Map Current Reality**

As a team, form a model that represents the current state of the system you are trying to change. Each object in the model will represent a different element, quality (inner or outer) or stakeholder of the system.

- As you place an object, share with the other team members what the object represents. Do this one person at a time to get into a co-creative flow as the process unfolds.
- Include: inner and outer realities, internal and external stakeholders, and your own roles.
- Create your model in about 25-30 min.

**Part II: Reflect from Four Different Points of View**

Invite the group to reflect on your 3D Map from four points of view, each of which invites participants to step into a different archetypal perspective. If in-person, physically walk around your model, stopping on each side to consider the related questions. Online, follow the same process with the facilitator moving the model or camera to offer different views of the 3D Map to the group. The facilitator/scribe reads the questions aloud and captures key data points on a flip-chart for the group.

- **East = Heart/Lover** (Feeling and Relationships)
- **South = Will/Warrior** (Truth and Action)
- **West = Mind/Magician** (Perspective and Strategy Reflection)
- **North = Holding the Whole** (Purpose and Regeneration)
Heart/Lover

When you look at your model from the viewpoint of the Lover, the place of **feeling and relationship**, take a moment to sit with all your senses and your open heart. Pause, perhaps close your eyes, and then consider:

- What do you love in this picture? What about it ignites your best energies?
- What other emotions arise? If this emotion could talk, what would it say?
- What are the relationships (connections or separations) between the parts?
- What do you feel? Does your intuition tell you anything important about what is happening?

Will/Warrior

Now look at your model from the viewpoint of the **Warrior**, from the viewpoint of **truth and action**:

- What are some key agreements in the system that determine how it works?
- What are the key conflicts and hard truths that you have to face in order to move forward?
- Where do the different sources of power lie in this system?
- How can our collective will influence the system to alter the power dynamics?
Mind/Magician

Now look at this model from the viewpoint of the Magician, stepping back with intellect and perspective:

- Is there a way to reframe the challenges, or see them from another perspective?
- What can be done to change the system?
- Where is the hidden leverage?
- What are the most important barriers that, if removed, could help the current system to evolve?

Holding the Whole/Sovereign

Now look at this model from the viewpoint of holding the Whole, from purpose and regeneration:

- What is ending in this situation [wanting to die]?
- What is seeking to emerge [wanting to be born]?
- What do you feel is the highest future potential that is being called for in this situation?
- What will a better system look and feel like in 50 years? 100 years?

Part III: Map Your Emerging Future

As a team, based on everything you just heard, now change the model so that it better represents the emerging future that you want to bring into the world.

Begin with a moment of intentional stillness. For a minute or two, just gaze at the model in light of this question: What highest future possibility is trying to manifest / is trying to be born? Then, after a couple of minutes, silently move into a collaborative process of modifying the model so that it better represents the future that you want to co-shape.

Part IV: Harvest and capture key insights

For this Part, a scribe can capture the essential points on the flip-chart or shared online notes (for example, in a google document).

Step 1: Reflect on the Result

- What are the most important structural differences between model 1 and 2?

Step 2: Reflect on the Process

- What were the most important changes that transformed model 1 into model 2? What key intervention shifted the old structure (model 1) into the new (model 2)?
- What did you do first? What was the first significant change that you undertook as a team?

Step 3: Leverage Points

- What in your view might be the most important leverage points that, if you were to focus on them as a team, could help you to move the old model/system to the new? It may be helpful to refer back to the Iceberg Model (from Leading From the Emerging Future) that distinguishes between symptoms, structures, paradigms of thought and source.
Step 4: Gallery Walk (if your group does not have multiple teams, skip this step)

If you have several groups, take a gallery walk or take turns spotlighting each 3D Map and give each team 5 minutes to share:

- What they came up with
- What they learned in their transition from model 1 to model 2
- Also give time for the team to receive some reactions and questions from the rest of the team.

Step 5: Circle Conversation

Now reconvene in a circle with the whole group. Begin with sharing a few observations on what you noticed across team presentations, and what it might mean for potential leverage points that should be explored in possible prototyping initiatives.

Part V: Action Planning

Step 6: Next Steps

End the workshop by agreeing on how to stay connected and self-organize as a team:

- Meet weekly or bi-weekly or monthly?
- Who takes on what kinds of roles for the time being?
- Optional: Close the meeting with a one word checkout from each person one word.
Co-Sensing II: Stakeholder Interviews & Sensing Journeys

Over the next few weeks, your team will engage in further co-sensing activities, building on the insights gained from the 3D Mapping exercise. The methods for deepening your team’s co-sensing include Stakeholder Interviews and, if possible in your context, Sensing Journeys. These two activities are high-leverage sensing practices that can make a significant contribution to shaping your initiative. Moving to the edges of the system and viewing it from a new perspective can provide insights that help you to align your initiative with the reality, needs, and future potential of the system you hope to impact.

Rather than a workshop, this module takes team members into the system, either in person or virtually. For that reason, the format differs from other modules. As a core team, you will decide whether your extended team members join you as interviewers or are themselves interviewed. If you are in a context that allows the team to design and take a Sensing Journey, we highly recommend it. If this is not possible, try to reach out to a wide variety of stakeholders, including those on the margins, to see the issue or system as a whole.

To plan your co-sensing activities, we suggest the following process for your core team and interested extended team members.

**Step 1: Harvest insights from 3D Mapping**

Reflect on the learning from your 3D Mapping exercise. Take turns sharing the insights you found most significant.

What did you learn that can help you design Stakeholder Interviews? Who are the additional people/stakeholders you need to reach out to?

Where Sensing Journeys are possible, what are the places of most potential that you should connect with in order to learn and generate possibilities?

**Step 2: Plan your co-sensing activities**

Design a plan for holding Stakeholder Interviews. You can find instructions for the process below. Generate a list of potential interviewees, a timeline for contacting them and holding the interviews and clarity about who will be responsible for what. You can start doing Stakeholder Interviews at any point!

Where it is possible to take a Sensing Journey, designate a smaller subgroup of 2-3 people to take initiative in the planning and implementation of the journey. A description of the process can be found below.

**Step 3: Reconnect to share learning**

As a team, you can decide whether you want to connect in the middle of your Stakeholder Interviews to share learning mid-process or wait until all of the interviews/journey have been completed. When you do meet, share what surprised, touched and inspired you as well as potential challenges moving forward.
Stakeholder Interviews

Overview

Stakeholder Interviews are conducted by practitioners with their key stakeholders; depending on the ecosystem this could include community members, decision-makers, service beneficiaries, peers, or customers within and outside the organization/community. The interviews allow you to step into the shoes of your interviewees and see your role through the eyes of these stakeholders.

Purpose

The purpose of a stakeholder interview is to see your work and project from the perspective of your stakeholders. It answers the questions: What do my stakeholders want from me? What do they need this initiative for?

Stakeholder Interviews can be used in all phases of the U-process. Most common use is during the preparation phase of a project.

Principles

● Create transparency and trust about the purpose and the process of the interview; establish a personal connection early on.
● Suspend your voice of judgment (VOJ) to see the situation through the eyes of your interviewee. What matters at this point is not whether you agree with what your interviewee is telling you. What matters now is that you learn to see the situation through the eyes of the stakeholders.
● Access your ignorance (access your open mind): As the conversation unfolds, pay attention to and trust the questions that occur to you. Don’t be afraid to ask simple questions or questions you think may reveal a lack of some basic knowledge.
● Access your appreciative listening (access your open heart): Connect to your interviewee with your mind and heart wide open. Thoroughly appreciate and enjoy the story that you hear unfolding and put yourself in your interviewee’s shoes.
● Access your listening from the future field (access your open will): Try to focus on the best future possibility for your interviewee that you feel is wanting to emerge. What might that best possible future look like?
● Leverage the power of presence and silence: One of the most effective interventions as an interviewer is to be fully present with the interviewee and the current situation—and not to interrupt a brief moment of silence. Moments of silence can serve as important trigger points for deepening the reflective level of a conversation. More often than not, these opportunities go unused because the interviewer feels compelled to jump in and ask the next question. Be courageous. Stay with the opening of the NOW.

Uses & Outcomes

Stakeholder interviews offer:

● Enhanced clarity about how your work or initiative idea matters from the viewpoint of your stakeholders
- An understanding of how your stakeholders assess the value or benefit you create for them or potentially could create for them
- The identification of barriers and roadblocks that need to be removed
- A better and deeper personal relationship with your key stakeholders

Set Up

People & Place

Stakeholder interviews are particularly powerful when done face-to-face, but if in-person interviews are not an option, it is possible to create a connection virtually (video conference or phone) by attending to the quality of your presence..

Time

- 30-45 minutes for a phone interview.
- 30-90 minutes for a face-to-face interview.

Both figures are estimates and need to be adjusted to the specific context. **Allocate an additional 30 min. before the interview to prepare and 30 min after for review.**

Materials

- Interview guideline (questionnaire). Note: feel free to adapt the guideline to your context.
- Paper and pen to take notes.

Process

Part 1

- Identify the stakeholders who are relevant to your current situation or challenge/opportunity.
- Define/revise questions to adjust to the specific context. Schedule appointments.
- Decide whether to send the questions to the interviewee in advance.

Part 2

- Before you meet the interviewee, allow for some quiet preparation or silence. For example, take 20-30 minutes prior to an interview to relax and anticipate the conversation with an open mind and heart.

Part 3

- During the interview, listen with your mind and heart wide open, take notes, follow the principles.
- Ask questions spontaneously: Feel free to deviate from your questions if important questions occur to you. The questionnaire is designed to serve you and your work—not the other way around.
- Sample interview questions:
  - Within your organization:
    - What is your most important objective, and how can I help you realize it?
    - What criteria do you use to assess whether my contribution to your work has been successful?
If I were able to change two things in my area of responsibility within the next six months, what two things would create the most value and benefit for you?

With stakeholders in the system you want to impact:

- What is your most important objective?
- What energizes you about this work and what are the sources of frustration?
- What two things, if changed, would most help you to reach your objective?
- What would I/we/this initiative need to do to create the most value and benefit for you?

Part 4

- Right after the interview, take time to reflect on key insights, capture your key thoughts in writing.

Part 5

- Close the feedback loop: Right after each interview, send a thank-you note to your interviewee (within 12 hours).
Sensing Journeys

Overview

Sensing Journeys pull participants out of their daily routine and allow them to experience the organization, challenge, or system through the lens of different stakeholders. Sensing journeys bring participants to places, people, and experiences that are most relevant for the respective question they are working on.

These Learning Journeys allow participants to:

- Move into unfamiliar environments
- Immerse themselves in different contexts
- Step into relevant experiences

During social distancing, Sensing Journeys will be a more complex tool to adapt to the web. Some questions you may want to consider are: Can you prepare a journey that is entirely outdoors, with activities that permit distancing? Can you prepare a combination of in-person and online conversations? How might you be able to experience “a day in the life” of a key stakeholder group online?

Stakeholder interviews described above are a powerful co-sensing tool and may be less complicated to host online. However, if you feel ready, we invite you to get creative with Sensing Journeys so you can benefit from the often significant insights that arise from this multifaceted experience.

Purpose

To allow participants to break-through patterns of seeing and listening by stepping into a different and relevant perspective and experience. Sensing Journeys can also help build relationships with key stakeholders, and gain a system perspective.

Principles

A deep-dive sensing journey requires engaging in three types of listening:

1. Listening to others: to what the people you meet are offering to you.
2. Listening to yourself: to what you feel emerging from within.
3. Listening to the emerging whole: to what emerges from the collective and community settings that you have connected with.

Go to the places of most potential. Meet your interviewees in their context: in their workplace or where they live, not in a hotel or conference room. This happens naturally when meeting people through videoconferencing; make sure to gently ask them to keep their webcam on, if they feel comfortable. When you meet people in their own context you learn a lot by simply observing what is going on. Depending on your context, you may want to ask your host to show you spaces and aspects of their setting that are significant.

Observe, observe, observe: Suspend your voices of judgment (VOJ) and cynicism (VOC) and connect with your sense of appreciation and wonder.
Without the capacity to suspend judgment and cynicism, all efforts to conduct an effective inquiry process will be in vain. Suspending your VOJ means shutting down the habit of judging and opening up a new space of exploration, inquiry, and wonder.

**Uses & Outcomes**

- Increased awareness of the different aspects of a system and their relationships
- Enhanced awareness of the different perspectives of the stakeholders and participants in the system
- Connections between stakeholders and participants
- Ideas for prototypes
- Use with [Listening tools](https://www.presencing.org/#resource/permission)

**Set Up**

**People & Place**

The group splits up into sub-teams of about 5 participants. The group composition matters because a mix of perspectives enhances the impact of the sensing journeys.

Define places of high potential for the sensing journeys. The whole group of participants should go to several places that can provide insights into:

- The different perspectives of the system’s key stakeholders
- The different aspects of that system
- Those in the system who are usually unheard or unseen.

A good way to get a sense of the system is to take the perspective of its “extreme users”: for example, in a business setting these can be customers who use the services or products more than others or in different ways, or in a services setting, these could be individuals with special requirements, such as a person living in a remote area needing access to a health system.

**Time**

The length of a sensing journey depends on the size of the geographic area or system being covered. It is recommended to allocate at least 1 day to sensing journeys in a workshop context and several days or weeks (sometimes spread over a period of months) in a larger project setting.

**Materials**

If the hosts agree, it is advised to take pictures and/or videos during the journey. These can be useful during reviews with the other groups and as a reminder for the participants.

If in person, other materials may be collected as well, after seeking permission from the hosts. A pen and journal are needed for taking notes during and after the journey.
Process

Part 1

Identify Sensing Journeys: find places, individuals, organizations that provide you and the group with new perspective.

Part 2

Prepare as a group by discussing:

- What is the context that we will experience?
- Who are the key players that we will talk to?
- What questions do we want to explore?
- What assumptions do I bring with me? What do I expect?
- Share your most eye-opening sensing experience to date

Start by developing a short questionnaire (7-10 questions) that guides your inquiry process. Keep updating your questionnaire as your inquiry process unfolds.

Prepare the host: Share the purpose and intent of the visit. Communicate that it would be most helpful for the group to gain some insight into their “normal” daily operations, rather than a staged presentation. Try to avoid “show and tell” situations.

Part 3

Small groups travel to the host’s location, or meet with the host virtually.

While meeting: trust your intuition and ask authentic questions raised by the conversation. Asking simple and authentic questions is an important leverage point in shifting or refocusing the attention to some of the deeper systemic forces at play.

Use deep listening as a tool to hold the space of conversation. When your interviewee has finished responding to one of your questions, don’t jump in automatically with the next question. Attend to what is emerging from the now.

Example questions for sensing journeys:

- What personal experience or journey brought you into your current role?
- What issues or challenges are you confronted with?
- Why do these challenges exist?
- What challenges exist in the larger system?
- What are the blockages?
- What are your most important sources of success and change?
- What would a better system look like for you?
- What initiative, if implemented, would have the greatest impact for you? For the system as a whole?
- If you could change just a few elements of the system, what would you change?
- Who else do we need to talk to?
Part 4

After the visit, reflect and debrief: To capture and leverage the findings of your inquiry process, conduct a disciplined debriefing process right after each visit. Remain focused on the activity: don’t switch on cell phones until the debriefing is complete. Here are a few sample questions for the debriefing:

- What was most surprising or unexpected?
- What touched me? What connected with me personally?
- If the social field (or the living system) of the visited organization or community were a living being, what would it look and feel like?
- If that being could talk: what would it say (to us)?
- If that being could develop—what would it want to morph into next?
- What is the generative source that allows this social field to develop and thrive?
- What limiting factors prevent this field/system from developing further?
- Moving in and out of this field, what did you notice about yourself?
- What ideas does this experience spark for possible prototyping initiatives that you may want to take on?

Part 5

Close the feedback loop with your hosts: Send an email (or other follow-up note) expressing a key insight you took away from the meeting (one or two sentences), and your appreciation.

Part 6

Debrief as a whole group: After a one-day learning journey this debriefing would take place in the next meeting with the whole group. In the case of a multi-day learning journey, plan to meet between the individual days if logistics allow.

Structure of the whole group debrief meeting:

- Get everyone on the same page by sharing concrete information about the Journeys: Where did you go, who did you talk to, what did you do?
- Talk about your findings and generate new ideas.
Presencing

In the Presencing Module, your team will come back together for a deep dive that brings together the horizontal connection of co-sensing with the vertical connection to our inner sources of knowing in order to connect with the social field of the system you are working to change.

Learning Objectives

During this module, you will transition from looking at the system from the outside to exploring what it looks and feels like from within. This will surface deeper leverage points for change and prototyping possibilities.

By the end of this module, your team will generate:

1. A new shared perspective and language for moving from current reality to an emerging future reality.
2. A further revised set of driving forces that shape the system you are collectively trying to change, along with core questions and insights into opportunities related to each of them.
3. Prototyping ideas that you can explore together in the weeks ahead.

Designing and Facilitating a Half-Day Workshop

Bring your team together for a half-day workshop either in-person or virtually. You will facilitate a sense making process called 4D mapping. This workshop will require 2.5 - 3.5 hours (depending on group size). Below, we’ve created a suggested workshop structure to help you plan and facilitate this process.

Preparation

1. Review the Logistics information (below)
2. Watch the recorded demonstration of 4D mapping: https://vimeo.com/324145950
3. For those working virtually, we will post a video demonstration of 4D mapping online to Sutra shortly.

Logistics

This section gives an overview of all the logistics you will need to consider and prepare for your workshop. Please review this immediately, as you will need to obtain materials and do some preparation in advance. In particular, be sure to prepare:

Meeting Room

- Circle of chairs/seating arrangement
- Open Space and a clean floor on which to move around
- Natural light if possible
- Plants/Flowers or something that brings nature into the space
- Access to water (tea/coffee/snacks if possible)
Environment and Technology (online)

- Connection with sufficient bandwidth (to increase bandwidth, close all other applications)
- Verify audio and video settings beforehand, if you plan to show the instructional video
- Make sure you have updated to the most recent version of Zoom. Ask participants to do so before the event.
- Let participants know it is best if they can avoid joining via mobile devices, and instead attend the meeting via a computer, with a headset for better communication
- Allocate a couple of teammates who will lead the process and one or two to be technical support
- It is helpful to send a description of the workshop to your participants ahead of time

Required Materials

- Name Tag Materials
- Journals (or at least paper) and pens
- 10-15 sheets of heavy weight paper approximately 11” x 17”
- Thick black marker (large Sharpie chisel tip marker)
- Role cards for 4D Mapping (see instructions for determining roles in 4D mapping Process section, below)
- Clips (small clothespin are the easiest) to attach role cards to clothing (OR strong adhesive tape)
- Flip chart with instructions that say:
  - Speak from the “I”
  - Step into someone else’s shoes (not your own role)
  - Access your true feelings in the now (Do not act. Instead, embody the feeling of the role)
  - Take your time
  - Follow the field

Additional Notes

- You will need a minimum of eight people to do a 4D map.
- You should prepare the 4D roles before gathering together for your workshop. See instructions in the 4D mapping section.
- Core team will need to prepare roles on sheets of paper and instructions on the flip charts.

Workshop Structure

Check In (30 min)

Start with a check in with everyone seated in a circle. Create a circle of chairs or seats where everyone in the group can see each other. In a virtual gathering you can begin by inviting everyone to take a moment to notice everyone on the call and visualize the group sitting in circle together.

Core Team Member(s): welcome everyone. Facilitate the following check-in structure:

- Meditation/Moment of Stillness together. Emphasize the feeling of the body, sensations in the body. Then, reflect on your sensing activities. Remember a moment that touched your heart. Take a moment to journal.
Check in: (with small groups if the group is large) share one key moment that touched your heart from the last few weeks of sensing and learning activities.

When everyone has had a chance to check in, begin the 4D Mapping process described below.

You may want to begin with a warm-up to embodied work. If so, we recommend you begin with the 20 minute dance exercise. You can find a description and demonstration here.
4D Mapping

Overview

In Social Presencing Theater, the word theater is used in connection to its root meaning – a place where something significant becomes visible, or where a community of people can see a shared experience. 4D mapping makes visible the current reality in a social system, such as a school system, health care system, or government.

Purpose

We use 4D Mapping with groups who are looking to gain new insights about their own system, and with clients who have a case they want to explore using this method.

Principles

4D mapping explores how the highest aspiration in a system might come forward. We assume there is an underlying wisdom – in spite of the diverse values or goals of stakeholders in a system – that could come to the surface and be visible as we move from Sculpture 1 to 2.

- Participants apply mindfulness of body and awareness of the surrounding space.
- 4D mapping is not about acting out preconceived ideas or concepts we have about a system.
- 4D mapping is about surfacing and noticing what shifts in a system might be significant in moving from current reality to an emerging future reality.
- Movement is based on what is actually emerging, not based on manipulation or what we think something should be.

Process

Roles

- There are two basic types of roles in 4D mapping: players and space-holders. There is also a facilitator and a scribe (the scribe writes down the sentences that people speak from their shapes).
- Those who hold the space sit in a circle and players embody roles in the center of the circle.
- There are typically 8-12 players. Everyone else remains in their seats in a circle. Once the movement from Sculpture 1 to 2 begins, space holders can move around the periphery of the circle.
- 4D mapping is a co-created event that depends on the quality of everyone's attention. Therefore, space holders should give their full attention to the players.
- The roles in the system should be predetermined. Determine the roles together with your team or with the problem owner prior to beginning 4D mapping.
  - Important: Always include roles that represent the 3 divides: the earth/environment, marginalized groups or individuals and the highest future possibility of the system.
  - Write the name of each role on a card. Use labels with tape on the back to help everyone remember the roles. It’s helpful to be specific with roles. See the 4D mapping videos linked at the beginning of this module for examples.
  - Decide the order in which the facilitator will call out the roles. We find it helpful to begin with the more powerful roles in the system.
Co-Initiating

- The facilitator/host takes a moment to remind the group of the intention and the system the group is about to map. Use the time as an opportunity to sense back into the current reality.
- Pause for a moment and practice mindfulness of body. Connect to the feeling of the body, especially the back of the body.
- The facilitator may remind everyone: When we step into the space, we let go of concepts of how it should be, or how it should transform – we don’t know the answers. We step into an open space with an open mind, and we embody our element of the system. We make a shape with our body that we feel expresses some quality of the role we’re playing.

Co-Sensing

- The facilitator says the name of the role and holds up the first card, with a pre-determined role written on it.
- One-by-one, a person from the circle will stand up and volunteer to embody that role. The only guideline here is not to choose the role you actually play in your daily life.
- The player takes the card with the name of the role and affixes it to his/her shirt so it is visible to others.
- That player finds a place in the room and a shape that embodies the experience of that role in the system. Each player comes in, finds a place in relationship to the center, the edge, and the other players. They may find it helpful to ask themselves, “am I bigger, smaller, in the center, to the side; do I feel powerful, weak and vulnerable?” Whatever it is, they embody it in the space so that others can see it. Remember not to act, but to empathize, identify with the role and embody it.
- Once in the shape, the player says one sentence from the experience of that shape, in the first person “I” voice. The scribe writes these down.
- Then, the facilitator calls the next role and the process is repeated until all roles have been embodied.
- Once all players have entered the space, the facilitator invites anyone who feels they need to adjust their place, level or direction in the space so that it more accurately embodies current reality to do so.
- Once everyone has found a place and shape, that is Sculpture 1. Sculpture 1 represents a feeling of current reality in the system.

Co-Presencing

- The players let go of any idea of the outcome and stay with the stillness for a few moments.
- Somewhere in this sculpture, movement will arise.

Crystallizing

- Then the sculpture begins to move and continues moving until the social body comes to a stop in Sculpture 2. This whole process could take about five minutes.
- Nobody is directing the movement of the sculpture.
- From Sculpture 2, each player says the name of their role and one sentence from the experience of their new position in Sculpture 2. The scribe can record what is said.
Generative Dialogue

Give yourselves 20 minutes for this part of the process.

- As a whole group, without moving from your sculpture (feel free to relax your shape so you are comfortable for dialogue), reflect on what you experienced.
  - Describe your experience: I saw, I felt, I did... suspend interpretation.
- The following reflection questions are useful after 4D mapping:
  - Origin of movement — where did the movement begin?
  - When did the sculpture shift?
  - What was the difference between sculpture 1 and sculpture 2?
  - What surprised you?
  - What were the dynamics in the system?
  - What was not spoken?
  - What was holding us back
- Hear data points from the scribe
- The facilitator can invite people from the circle (those who remained seated and didn't embody a role) to also offer one sentence.

Small Group Discussion

Keep your role card on. Turn to small groups of 3-4 people and discuss. Continue making connections to your real experience and what happened in the sculptures.

- What did you learn about your system?
- What are the key differences between Sculpture 1 (current reality) and Sculpture 2 (emerging reality)? What are the top three features that changed?
- Given the shift that you saw from sculpture 1 to sculpture 2 - what prototyping possibilities would allow you to explore that shift by doing? What might such a prototype look like?

Circle Conversation

Assemble back into a large circle. Have each group share some of the major shifts they noticed in the 4D map and some of the possible prototyping areas that could be explored as a group. Build on each other’s ideas. Crystallize your prototyping ideas into one or several that could be explored further in the next steps of the Lab.

If you have time, conclude by developing a mini plan of action for the remainder of the month:

- Clarify intention for each of the prototype ideas.
- Identify the main stakeholders that need to be involved.
- Identify how to connect with these stakeholders through stakeholder interviews or other methods.

Stepping Out of Roles

**Very important:** Bring your role card back to the middle of the circle and, having connected with that role in some way, share a comment, appreciation and/or closing remark. This process helps each person to consciously step out of the role they have embodied.
Next Steps

In the week that follows the 4D mapping process, you may want to continue the prototype conversation you had at the end of the workshop in order to continue sensing into what has shifted and what possibilities are beginning to open up.

As an option to further crystallize prototyping ideas, gather again the following week. During that time:

1. **Form groups**: Place ideas on the wall with Post-it notes, or an equivalent.
2. If you have the space, **spread different ideas out along a wall**.
3. Everyone in the group can **move to the prototype they feel personally called to bring to fruition**. It could be that only one emerges, but there may be several. In our experience, prototype teams of 5 people work best, but groups that are slightly smaller or larger can also work.
4. **Build out prototype ideas**: Do a 3D map on your prototype initiatives. Use the same 3D process that we used during the previous month. First map the current reality/understanding of the prototype. Then evolve it into an emerging possible form.
5. **Make a plan to reach out to stakeholders** who you need to connect with now in order to advance your prototyping initiatives. Stakeholder interviews are a useful tool here.

In the next module, we introduce practices that will help you refine and evolve your prototype.
Crystallizing & Prototyping

Vertical Prototyping is an awareness-based practice for translating an idea or a concept into experimental action. In the Crystallizing & Prototyping module, you will bring together the learning from your 4D mapping and your sensing activities to crystallize and evolve your prototype idea. The exercises below guide you through this process. You will then design and explore your prototype ideas by doing: taking concrete actions that generate feedback from relevant stakeholders and help you to iterate.

Learning Objectives

1. Learn to explore the future by doing
2. Listen to the feedback the universe is offering to you
3. Develop a living microcosm of the future that is wanting to emerge
4. Iterate, iterate, iterate

Designing and Facilitating a Half-Day Workshop

Bring your team together for a half-day workshop. You will review sensing activities from last month and get started on your prototypes. We suggest you structure the workshop in three parts:

1. Co-sense: review 4D mapping and stakeholder interactions (45 min)
2. Co-inspire: journaling (60 min)
3. Co-create: prototype design studio (approximately 2 - 2.5 hours)

This workshop is designed to take approximately four hours (depending on group size). Below, we’ve created a suggested workshop structure to help you plan and facilitate this process. Of course, a core value and practice of u.lab is that you make the process work for you, your context and your stakeholders. We encourage you to adapt and innovate wherever needed to better serve your intention.

Preparation

Environment and Technology (in person)

- Circle of chairs/seating arrangement
- Open space and a clean floor on which to move around
- Projector and area to watch videos (for journaling exercise - see below)
- Natural light, if possible
- Plants and flowers, or something that brings nature into the space
- Access to water (tea/coffee/snacks if possible)

Required Materials (in person)

- Large paper on the walls or flip-chart easels
- Journals or paper to write on
- Post-It notes
- Markers
● Pens

**Environment and Technology (online)**

- Make sure that your zoom account is updated and ask participants to update their accounts before the workshop
- Connection with sufficient bandwidth (to increase bandwidth, close all other applications)
- Verify audio and video settings beforehand
- Capacity to show the Vertical Prototyping video
- Make sure all participants have updated their Zoom accounts so that people can create and select break out rooms
- Allocate a couple of teammates who will lead the process and one or two to be technical support
- It is helpful to send a description of the workshop to your participants ahead of time
- Let participants know it is best if they can avoid joining via mobile devices. Recommend that they attend the meeting via a computer instead, with a headset for better communication

**Required Materials (online)**

- Journals or paper to write on
Vertical Prototyping

Workshop Structure

Part I: Co-Sensing (45 min)

The intention of the first part of this month's workshop is to integrate the learning from your sensing and co-presencing activities into the creation of your prototype(s).

Step 1: Start seated in a circle.

Reflect on your team's 4D mapping experience and review the 4D map you created together in the previous workshop, including any prototype initiatives you may have already identified in your previous meeting. The facilitator can pose a few questions to help the group review or specify possible prototype ideas:

- **Where did movement begin in Sculpture 1?**
  
  **Facilitator notes:** The place where movement begins in a 4D map is significant because sculpture 1 is considered a “stuck” situation - a current reality that is not sustainable. Because the journey from sculpture 1 to 2 represents a possible pathway from current reality to an emerging reality, your group may want to focus on one prototype initiative on creating the conditions (in real life) for that first movement to begin.

- **What were the key structural differences between Sculpture 1 and Sculpture 2?**
  
  **Facilitator notes:** A 4D map is a representation of how different elements in a system relate to each other. Remember, the ‘vocabulary’ we use in a 4D map to represent these relationships includes each role's level (standing, sitting, lying down) direction (who are they facing? Who are they not seeing?) and proximity (which elements are closer, farther away from each other)? Taken together, these elements offer a window into the power dynamics of a system; where individual and collective attention is focused; as well as where it might be absent. In addition to these external realities of the 4D map, it’s equally important to understand the first-person experience of each role in the system. This data can only be gathered by asking the people who embodied the various roles about their experience. How did it feel when X, Y, or Z happened? Learning the felt experience of various roles might yield surprising insights into prototype possibilities. For example, in a 4D map many years ago, during Occupy Wall Street, the role of the Big Banks stood on a chair in the center of sculpture 1, towering above the other roles. As the sculpture evolved from 1 to 2, this role remained in the center, at a slightly lower level, obstructing progress. It was eventually was pushed aside by other players in the system. In the debrief that followed, the person in the Big Banks role surprised the group in what he said. From the outside, the role appeared to be aggressively clinging to power. But the felt experience was that of fear; fear that in the new system, society would have no place for him. This suggested an alternative way to engage with Big Banks: rather than going on the attack against them, explore with them what their future role in a healthier society could be. This was not to say that activism was the wrong approach; rather, that there might be other unidentified or unexplored leverage points for creating change in the system. Such leverage points present great opportunities for prototyping.
- **What are the most important barriers or bottlenecks** that, if removed, could help the current system to evolve?
- **What did we learn in our stakeholder sensing activities** last month about how these barriers might be removed in our journey from sculpture 1 to 2? What else did we notice in our stakeholder interactions that is of potential relevance here?

**Part II: Co-Inspiring - Journaling (60 min)**

The purpose of the journaling practice is to link prototyping with each team member’s deeper life intention.

So far in u.lab 2x, we have mapped our system and looked at it from different perspectives (3D mapping). We’ve extended our co-sensing out horizontally, including to the margins of the system (Sensing Journeys and Stakeholder Interviews). We’ve stepped inside the current reality of our system and investigated how it wants to evolve from current reality to emerging future (4D mapping). At this stage, a core part of the U process is connecting with our deeper sources of knowing prior to moving into action - and when we do move into action, staying connected to these deeper sources.

Invite members of the team to get their journals and find a comfortable place where they can write for the next 30-45 minutes. They will need enough space in front of them to be able to stand up and take two steps. If you are planning to have a break in your workshop, it is a good idea to have it before the journaling so that you can move immediately into group dialogue afterwards.

In the journaling process, we invite you to look at your current reality—including what you’ve learned and accomplished so far in u.lab 2x—from the future. We now invite you to let go of any ideas of what you want to do, and see what else might be waiting for you to bring it into reality.

Once everyone is settled, play the Vertical Prototyping video (which can be found on Sutra)

**Part III: Co-Creating (2 - 2.5 Hours)**

Immediately after journaling, move back into the circle. If possible, delay having a break. Journaling brings people into a deeper space of reflection and possibility, and a break can disperse the energy. Once dispersed, it’s hard to get back.

**Step 1 (30 min)**

Start with a simple sharing in the circle. Each person shares what came up for them during journaling. If you have a large group, you can split into smaller sharing circles of 7-10 people.

**Step 2 (15-20 min)**

After everyone in the circle has had a chance to share, invite team members to turn toward others whose ideas connect to theirs and begin to explore potential prototypes together. In the prototyping phase you want to try a variety of things, learning by doing in small groups, rather than the whole group debating about
what to do, so in larger groups it is a good idea to split into prototype teams. Each prototype team should have 5-7 or so team members.

**Step 3 (15-20 min)**

As groups form around prototype ideas, pause the process and invite each prototype groups to share their idea across groups. This helps people find the right prototype group for them. If there are more than 2-3 prototype ideas, you can use the 7R criteria below to select the most relevant ones.

**7R Criteria**

1. **Is it relevant?**
   a. Personally?
   b. For the organizations involved?
   c. For the communities most affected?
2. **Is it (potentially) revolutionary?**
   a. Is it new?
   b. Could it be transformative for the system?
3. **Is it rapid?**
   a. Can you begin it quickly?
   b. Can you start experimenting right away in order to get feedback and iterate?
4. **Is it rough?**
   a. Can you do it on a small scale?
   b. Is this the lowest possible scale you can do it on to allow for meaningful experimentation?
5. **Is it right?**
   a. Does this idea allow you to put the spotlight on the most meaningful variables?
6. **Is it relationally effective?**
   a. Does it leverage the strengths, competencies and resources of existing networks and communities?
7. **Is it replicable?**
   a. Can you scale it?

**Step 4 (30 min)**

Move into your prototype teams and continue, building on each others’ ideas using the **Vertical Prototype Canvas** to guide your conversation.

The **Vertical Prototype Canvas** is a tool to help teams further clarify and articulate their prototype from a place of source. Several of the journaling questions align with areas on the Vertical Prototype Canvas. Here, we invite you to map out together the eight prototype areas as they relate to your idea. This is an opportunity to engage in a dialogue with each other that generates a shared understanding of the prototype that is both deep and broad.

As you complete the Vertical Prototype Canvas together, we encourage you to listen deeply to one another and yourselves.
Vertical Prototyping Canvas

Sun
What is the highest aspiration that you are trying to bring into the world?

Living Microcosm
What could we do to explore the future by doing?

Strategic Actions
What is the most important strategic action that we need to take now?

Sensing
What pieces of most potential could teach us about what we are trying to do?

Stewards & Stakeholders
Who is in our core team, holding the whole? Who are other critical stakeholders that we need to involve?

Seeds
Where do we see the seeds (beginnings) of the future now?

Soil
What inner and outer holding space do we need to cultivate? What do I need to let go of?

Source
Why does this matter? Why is it, what we are called to do?
**Step 5 (20-45 min, depending on group size)**

Share your Vertical Prototyping Canvas with each other across teams. Aim for about 10 minutes per group (5 minutes to present, 5 minutes for feedback).

Presenters can elaborate on the systemic impact of their prototype by making reference to the 7R criteria, the Iceberg Model and/or insights that arose from 4D mapping.

In the feedback round, build on each others’ ideas. One member of each team should gather and capture quick feedback the group receives after its presentation.

As a process note for those who are interested: this cycle (Steps 5 & 6) is the prototyping process in a nutshell: you put an idea out to the world in order to get feedback on it, and then you iterate.

**Step 6 (20 min)**

Return to your own prototype team to integrate feedback to the evolution of your idea and clarify next steps.
Next Steps

- Translate these key insights to a specific mini-prototype experiment later this month that explores the future by doing. How can you shift a small microcosm of the system from sculpture 1 relationships to sculpture 2 relationships?
- You might also choose to do another 3D or 4D map focused on your prototype. See the next section for guidelines.
- Continue to think about: what is the narrative of your journey? If you haven’t been documenting your journey so far, now is the time to start.
Co-Evolving

While u.lab 2x has come to an end, your team will continue to meet and evolve your prototype(s) through many iterations. As it evolves, the prototype retains the best features of its earlier forms but changes in other ways in order to improve. At this point, there is often the temptation to move into ‘planning and execution’ mode. However, from a Theory U perspective, the most important aspect of this work is to act from source. This means that as you continue to evolve your prototype, it is important to do so in a way that supports our individual and collective capacity to ‘shift the place from which we operate’.

We invite you to think about what it means for you to embody this shift moving forward. What actions and practices support you to connect to your deeper sources of knowing as an individual, as a team and in relation to your project?

Below we’ve made some suggestions for supporting this shift as a team when you convene:

Stillness

When needed, take a moment of silence to ground and connect with yourself, with the social body of the group and your intention for your time together.

Deep Listening

Deep Listening is an everyday practice. We invite you to stay tuned to where you are listening from by practicing in your daily interactions with your family, friends and colleagues. This will help you build your inner observer and will grow your awareness of Self, others and the whole.

Check-Ins & Dialogue Walks

Connect with one another in the current moment. How are people arriving into the space? What is live for them in that moment? What are their hopes & intentions for your time together? This can be explored more briefly in a check in or more deeply through Dialogue Walks.

Journaling

It may be useful to take a few minutes for journaling and sharing the reflections that emerge. We have suggested some questions below:

- What are the most significant events, reflections or insights for you since we last met?
- What is most alive for you in this project right now?
- What do you feel called to ‘stay with’?
- Where do you feel you need to let go?
- What is your highest hope for this project?

3D and 4D Mapping

You may want to engage in these practices to continue to collectively gain insight into your prototype and next steps.
- Use a 3D or 4D mapping process to explore the deeper system dynamics that your prototype will engage.
- Refer to the earlier 3D or 4D mapping instructions as needed. The process is identical, but instead of mapping the whole system, you create a map of your prototype.
- In 3D mapping you can adapt the four direction questions to focus specifically on the prototype. This will mean the process is as follows:
  - Part I: Form a model that represents the current state of the prototype/initiative
  - Part II: Reflect on the Model from the four directions
    - **East**: What do you love about this picture? What ignites your best energies? What other emotions arise? What are the essential relationships between the parts—and what feelings do these generate?
    - **South**: What are the key conflicts and hard truths that you have to face in order to move forward?
    - **West**: What are the most important barriers or bottlenecks that, if removed, could help the current system to evolve?
    - **North**: What is ending in this situation and what is seeking to emerge? What do you feel is the highest future potential of this initiative?
  - Part III: Make changes to the model so it better represents the emerging future
- In 4D mapping this will mean that instead of many roles you may just have four or five roles.
  - Co-initiate by identifying the four to five most important roles in your prototype
  - Co-sense by mapping current reality in the system (sculpture 1)
  - Co-presence by moving into a moment of stillness, out of which a movement begins to emerge.
  - Crystallize by moving into sculpture 2 and capture insights. Remember, the key to 4D mapping is not to act or "play out" a preconceived idea, but stay connected to the feeling of the body—what the body wants to do—and allow the intelligence of the body and awareness of the surrounding system to be the sources of movement.
- Harvest and capture the key insights from the 3D or 4D map of your prototype. Debrief the shift from sculpture 1 to 2 from the viewpoint of all key stakeholders. Use the debrief principles (stick with the data: I saw, I felt, I did...) and questions listed in the 3D or 4D mapping instructions.
Storytelling for Learning & Impact

There is power in storytelling. Well-told narratives have a way of grabbing our attention, pulling us in, and engaging us in meaningful ways. They speak to our imagination, allow us to see what is possible, and hold the potential to open our hearts and help us sense into the lived experience of others. As we prototype toward ecosystem impact, it becomes clear that movement-building requires us to amplify stories of positive change so that they might spark inspiration and the courage to act in others. That is why the Presencing Institute continues to expand its use of social channels, our website, and Medium blog as platforms to share as many powerful stories of transformation as we can. In this section, we encourage you to craft and share your own story of impact.

Setting Up For Meaningful Storytelling and Learning

Here and on the Sutra platform, we have outlined some storytelling possibilities for your team’s 2x journey and we will continue to nurture the storytelling space throughout u.lab 2x. To best set up for storytelling, it can be powerful for your team to make some initial decisions together at an early stage, ideally integrating it into your co-initiation.

While it’s important to not let “telling the story” distract from the core work of your project, storytelling can be a powerful component for ongoing reflection and awareness of the team, capturing the learnings that are unfolding, energizing your surrounding ecosystems of support, and amplifying the discoveries and impact of what is emerging.

Some Questions For Your Team To Consider

We recommend setting aside some time to have a small conversation as a group about how you collectively would like to approach the process of harvesting, organizing, and documenting your journey to capture learnings and impact as they unfold. Nothing needs to be set in stone, but it’s great to open up the dialogue about it and sense into the group’s interests, excitements, and concerns. The following questions might be helpful to address:

1. **Who might feel naturally drawn to holding the harvesting and storytelling process for the group?**
   In case the answer is “no-one”, that’s okay, too. Perhaps, there is someone in your extended network, or even in the ecosystem you’re looking to impact, who you might invite to join the team to support you in this specific way?

   If and when there are some members of your group committed to supporting the storytelling process, besides reviewing the resources at the back of this source book, they may want to check in on the “Co-Evolving” thread on the Sutra Discussion Board for discussion, questions, and further sharing of resources.

2. **Who does your team wish to engage and why - to serve which intentions/purposes?**

   Depending on how your group wants to engage your community ecosystem, it may make sense to begin telling the story of your group’s process through social media or other outlets relatively soon. However, if this doesn’t feel clear or resonant with your team’s current focus, we recommend that you clarify with your team which stakeholders and aspects of the community you’d like to engage.
3. What agreements about priorities, privacy, and portrayal of the team members would be good to surface now?

Storytelling, especially when it involves telling a collective story shared by a group of people, requires trust, collaboration, respect, and clarity. It’s always helpful for the team to have check-ins now and again about how the story is being shaped, how that feels, and what might need support.

At the outset, what agreements might you all want to make about how your shared story will be co-shaped? How does each team member feel about their name and their image being used in various media? Make sure that each and every member feels space to voice what they are and are not comfortable with - there’s no right or wrong way to approach this. However, it is advisable to get a sense of how you will ask permission from people if you record video footage or take pictures. If someone doesn’t feel comfortable being recorded, how do they say so?

Many Ways To Bring Your Story To Life

Once your team is clear on what purposes are best served through harvesting, mirroring back to the community, and storytelling, it’s time to decide on what storytelling media you want to be using.

In the Co-Evolving thread of the discussion board, we will be aggregating different possibilities and examples of storytelling for impact ranging from poetry, to articles, to documentary video, to spoken word, to photography, or even simple bite-size social media posting. In today’s media age, with our many ways of connecting with our communities, there’s no shortage of methods for engaging your ecosystem, stakeholders, and supporters. Depending on your context, the shared intention you hold as a team, and what it is you need going forward, your narrative might take on different shapes. We encourage you to get creative with it!

Below we share two structures for sharing your narrative.

Note: If you plan to be publishing via different online spaces and social channels, we’d love to help amplify and connect others to your work. If you use the hashtag #ulab2x, our u.lab community will be able to best find and magnetize around what you’re putting out into the world.

Story Canvas

In the spirit of collaboration, we have come across a wonderful storytelling tool from the folks at Digital Storytellers. Not only is this a useful resource for getting a clear overview of your story, it is also a great tool to check whether you’ve considered all the elements that make up an engaging narrative. We encourage you to use their free digital storytelling canvas, which you can find here: https://www.digitalstorytellers.com.au/the-story-canvas/.
Amplify Your Story

If your team has a story to share, we would love to hear from you! To keep the articles short, we’re interested in the essential information (your team’s big idea and the emerging impact of your work). If you’d like to have your story considered for publication on the Presencing Institute blog on Medium, please send an email to u.lab@presencing.com with the following information:

1. **About your team** (1 sentence). Example: "An 80-person team in Brazil called Cambia Festival is creating self-organized, open-source festival for societal transformation." Another example: "A small and dedicated group of 20+ local community members, academics, and entrepreneurs have been meeting regularly over the past two months as part of the Circular Design Lab - which grew out of u.lab-S - to map the waste management challenges in the city as well as co-create solutions."

2. **Emerging impact** (1-2 sentences). Example: “Their first prototype, "Cambia Favela da Paz" convened 500 diverse stakeholders from in and around Sao Paulo's historically most violent slum to reflect together on "how can we, as individuals or as a community, help to contribute to a more sustainable society and the dissemination of a culture of peace?".

3. **One or more photos of your team or stakeholders in action.**

We look forward to hearing your stories!