

**WISDOM LABS:**  
**Creating Conditions for the Reliable Emergence of  
Wisdom and Right Action in Groups**

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Perhaps some of us will feel moved to create opportunities to systematically explore the artistry of convening, to experiment with different ways of moving beyond initiation to helping groups sustain their experience of the phenomenon. Perhaps others of us might work with the principles, inquiring together how these principles might inform the work we do.

Such has been our intention through this effort: to experiment with different ways to help groups sustain their experience of the phenomenon of collective wisdom. In particular, we have focused on helping groups develop their capacity for sensing and influencing the future, for consciously cooperating with what is emerging. We have been informed by our individual experiences working with groups for more than 25 years in myriad contexts. We have also been instructed by myriad teachers and authors, too many to name individually in this space. We humbly acknowledge, however, that this work is made possible because of the efforts and contributions of so many who have gone before us, offering their wisdom, clarity, and guidance.

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## An Opening Reflection

“If I could craft you a code to live by, a handful of simple practices that will serve you steadfast when you feel lost or confused, it might be this:

“With love, compassion, trust, and creativity, be honest and straightforward about what you want, need, and feel, and respect the integrity of these to your nature.

“Love the truth of a moment more than anything you might wish would be there.

“Try to see what lives in a moment before you put anything there.

“Discern your knowing voice from all other voices, streams of thought, or desires.

“Experience values without judgment.

“And cultivate courage of action, so your vision and understanding can be expressed as your life.”

— Elia Wise, from a letter written to her daughter and included in the preface of *A Letter to Earth*.

## Introduction

There are moments when groups and larger collectives feel more alive, when members feel more connected to each other and to larger life forces, more vibrant and capable of extraordinary action. There are moments in groups when we can be amazed and humbled by what just happened among us, and through us.

There are also times when groups get stuck; when we face overwhelming circumstances, seemingly intractable patterns of relating, or dilemmas fraught with conflict that shred our confidence that we can accomplish anything of significance. Sometimes these experiences are fleeting; at other times we feel the weight of years of old behaviors and failed analyses dragging us back one more time into structures and ways of acting we *know* will not get us where we want to go, but find ourselves returning to nevertheless.

What if these stuck places could be transformed—reliably—into portals for the remarkable? What if we could reliably and consciously participate in processes to evolve ourselves, the institutions we depend upon, and the stories we take for granted?

This is the premise of Wisdom Labs: that through the embodiment of a few core perspectives and principles, groups can reliably access their innate capacities for collective intelligence to support the emergence of wisdom and right action within persons, institutions, and communities.

The purpose of this paper is to outline and illustrate our emerging understanding of the process structures we are calling Wisdom Labs. It represents our best thinking to date; each time we conduct a Lab we learn more about this process structure, and about how best to frame and describe it.

Our work to date has been heuristic, moving from a set of core principles and hypotheses to evolve different practices and approaches within a variety of contexts. Through this paper, and the subsequent papers and book that will follow, we want to invite others to experiment with the principles and practices we are describing here. More crucially, we want to invite challenge, testing, and refinement of our analysis about what lies at the heart of Wisdom Labs, and about their potential service to groups, to institutions and communities, and to the larger unfolding of all that is.

## What is a Wisdom Lab?

Our answer to this question is still evolving; here is what we can say for now. A Wisdom Lab is a process structure designed to enable groups to experience moments of extraordinary awareness, insight, and clarity with greater frequency and reliability—and to sustain these moments over time to support transformative action and creativity. Our research and experimentation to date suggest that Wisdom Labs can be of particular use to individuals and groups who are:

- ❖ Facing profound formative challenges—e.g., significant transitions or adaptive dilemmas for which patterned and habitual responses are no longer sufficient;
- ❖ Seeking to discover or support the emergence and evolution of social inventions; and
- ❖ Seeking to consciously cultivate and evolve their identities, and the deeply embedded narratives and patterns of behavior that both emerge from and reinforce these identities.

While Wisdom Labs can focus on an individual, a group, an idea, or an emerging field, the process of a Wisdom Lab is always a relational process. Whether involving two or two hundred, a group engaging in this process evolves from an intention to align with and support whomever or whatever is the focus of the Lab, cultivates the conditions for the emergence of wisdom and right action, and embodies and experiments with potential pathways forward.

A Wisdom Lab can be completed in one Lab session in a few hours in a single day, or unfold over many months through multiple Lab sessions. While this paper shares stories of events that primarily occurred within discrete Lab sessions, we understand a Wisdom Lab to be, at its core, a sustained field of collective intention, support, and discernment that emerges prior to, and continues well beyond, any particular Lab session. Moreover, our experience with Wisdom Labs over the past two years, and with thousands of groups over the past twenty-five or so years, lead us to a hypothesis that Wisdom Labs are a particular manifestation of a more fundamental aspect of human relationships, amplified when we gather in groups, that enables human beings to participate as conscious co-creators with that which animates us all. We will explore this more fundamental aspect of Wisdom Labs in future research and writing.

### ***Why the name 'Wisdom Lab'?***

We use the term *wisdom* to reflect the quality of knowing and right-action that emerges through the process. The knowing is not of the mind alone, nor is it of any individual alone. When this knowing and sense of right action emerges, it does so from deep within the individual participants, from within the collective awareness of the group, and from within the larger field that holds the group.

We use the term *lab* to reflect the experimental and experiential nature of the work that occurs within these processes. In the movie *Apollo 13*, about the NASA mission to the moon that almost ended in tragedy, when the crew radios Mission Control that they have a problem, one of the first responses from the NASA scientists and engineers is to create a lab. They use a space capsule

simulator and test different options for how to respond to the crisis before recommending a course of action to the crew. In Wisdom Labs, our intention is to create a space where a group, or an individual with the support of a group, can experiment with, and experience some of the consequences of, different options for action before committing to a particular path forward.

### ***What are the essential claims underneath the concept of Wisdom Labs?***

First: *In any moment* a deeper wisdom is available to us; in any moment there are larger truths wanting to be known, a more whole, healthful, purposeful way for which Life energy longs and seeks embodied expression. We use different phrases to describe this phenomenon, more or less synonymously: *the evolutionary impulse*, and *what is wanting to happen* are two phrases that will recur regularly throughout this paper. While we know such language is imprecise and awkward, we use it to convey our conviction that there is a source from which insight and right action emerges that is beyond individual will and effort.

Second: With courage, discipline, and playfulness, groups can consciously collaborate with this evolutionary impulse. Groups have profound capacities for collective intelligence, insight, and sensing, related to but distinct from these capacities in individuals. These collective capacities, when developed and focused, can create a reliable portal for a deeper wisdom to emerge and inform what will happen next.

Third: There are principles and processes that, when pursued with intention and focus, can help groups manifest their capacity to become conscious allies of the evolutionary impulse, co-authors of what is wanting to happen. We call this unique combination of principles, processes and structure the Core Lab Process. This approach begins with a stance, an orientation by the facilitators to *come alongside* an individual or group and, much as a mid-wife partners with a birthing mother, move in steady rhythm to assist the individual or group in giving birth to what is seeking to emerge through them now.

Fourth: Groups can more readily align with, and become allies to, the evolutionary impulse if they embrace a living systems perspective. All living systems have beginnings; all living systems confront dilemmas as they mature and evolve; and all living systems at some point die. These natural cycles exist independently of human will. We can choose to cooperate with these cycles, or we can struggle against them, but we cannot fundamentally alter their order and unfolding. Moreover, within any living system, movement is *always* happening, something is *always already* emerging. Part of the work of Wisdom Labs is to help groups discern where they and their work are from a life cycle perspective, and to use this understanding to align with and guide what is already present and now wanting to emerge.

Fifth: Conflict, stuckness, or chaos within a living system is a signal that something deeper is trying to unfold. When creatively engaged, such conflict and chaos can provide a gateway to a system's evolutionary impulse. An essential dimension of the work in Wisdom Labs, therefore, for both individual participants and the group as a whole, is to release their fixation on the symptoms associated with the conflict or chaos and begin to explore, from many different vantage points, what lies underneath. Many of the core practices we employ within Wisdom Labs are intended to encourage and facilitate this process of release and exploration.

## ***What is our validity claim?***

In other words, how do we, or anyone, know that a group is aligned with the evolutionary impulse, rather than simply pursuing its own willful agenda, however narrow or noble?

First, our research base: over the past two years, we have conducted 12 Labs under the auspices of the Fetzer Research Project. Attachment 1 contains a table briefly describing each of the Labs. Data from these experiments, as well as from our more than 25 years each of working with groups, has informed the hypotheses and claims we make here.

In his landmark series of books, *The Nature of Order*, Christopher Alexander recounts the evidence from many disciplines for the existence of fundamental laws that govern the emergence of order throughout the universe. Alexander, an architect, contends that these laws apply to “all structures in the universe, from atoms, to crystals, to living forms, to galaxies.”<sup>1</sup> He believes these fundamental laws exist beyond the determination of culture or individual predilection, and that when human beings build in accordance with these laws, we *know* it. We recognize and respond as human beings to the *rightness* of these structures, to the *quality with no name* that underlies these structures.

In any given Wisdom Lab, and across multiple Labs, the data we currently rely on for our assertion that a group has aligned with and become a conduit for what is wanting to happen is a felt and expressed sense, both within us and within the group, that:

- ❖ Knowing and right action have emerged in forms and directions that were not pre-determined, or even imagined at the beginning of the process;
- ❖ This knowing and action is tested for how it reflects and integrates the diversity of perspectives represented and sensed by participants in the group, and has emerged without the acquiescence or disengagement of any individual or sub-set of the group;
- ❖ There is a *rightness* about what has emerged, and a palpable sense of alignment among participants with each other and the actions they commit to take moving out of the lab; and
- ❖ This knowing and action produce tangible positive results for the individual participants, for the group as a whole, and for the enterprise(s) the group is seeking to influence.

Over the next year, we will continue our work to discern better, and more independent, methodologies for assessing the impact of Wisdom labs on participants and on the enterprises they lead. We are very encouraged by the results that have already emerged from the use of Wisdom Labs in the wide array of contexts that were part of this initial study. We also know that, currently, we do not have sufficient data, nor sufficient experiences in cross-cultural contexts, to assert with confidence that Wisdom Labs generally, and the Core Lab Process in particular, are

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<sup>1</sup> See, for example, <http://www.math.utsa.edu/sphere/salingar/NatureofOrder.html>, for a brief summary of Alexander’s theories.

timeless ways of discerning and giving shape to the emergence of right action within groups. We do hold this claim in our hearts, however, as hunch, as hypothesis.

What we can say with conviction is that our experiences working with groups over the past quarter century line up well with the process as we now describe it. That is, we can both tell the story of what happened in many of the groups we have worked with, and assess what contributed to the groups' succeeding or failing to achieve their ends, using this framework. Moreover, we now have enough data from the intentional experiments we have conducted over the last two years using this process to suggest, cautiously, that when groups consciously work with this process, breakthrough insights and pathways to action emerge consistently and reliably.

## The Contexts and Levels of Focus for Wisdom Labs

Wisdom Labs, as distinct from strategic planning, scenario planning, and other processes for helping groups *decide* what to do, focus on helping individuals and groups *discern what is uniquely theirs to do*, and what role they have to play in helping to make visible a nascent structure or movement *already emerging*. This is a profoundly challenging stance for Lab participants to sustain. Cultural and professional norms reinforce a belief that change is up to us alone, that *we must will* what we want to happen into being. To engage instead from an evolutionary perspective, to work to discern what *is already underway* and to seek to align with this movement, can challenge deeply embedded individual and collective instincts for action, particularly in moments of great confusion or not-knowing within a Lab.

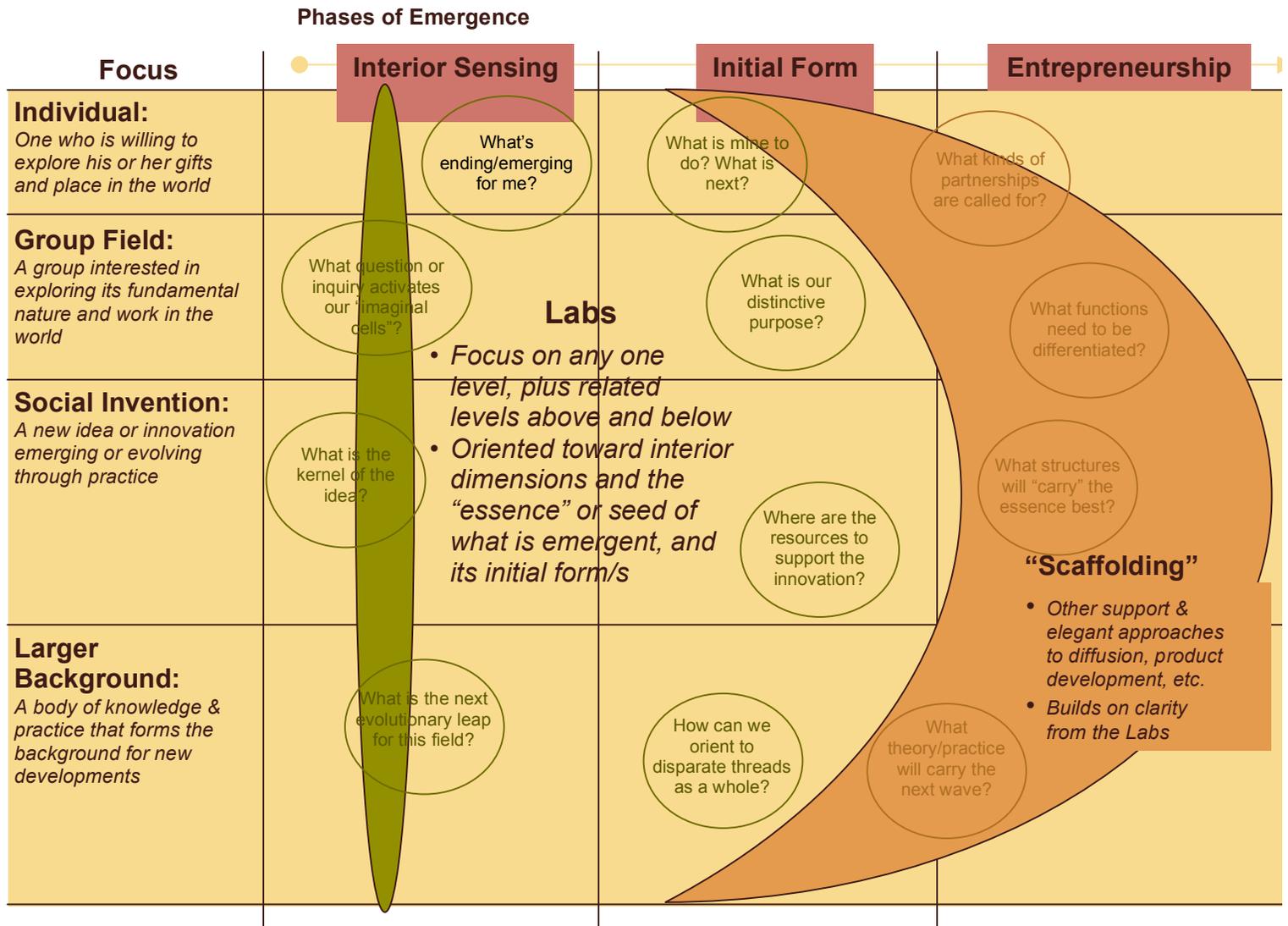
We have developed Wisdom Labs within various contexts over the past two years, including groups or individuals facing formative challenges, seeking to create or extend the application of social inventions, and/or working to consciously evolve their identities and roles. Each of these contexts represents a palpable fissure between past and future, an opening that offers opportunity and profound risks for the individuals and groups who face them. While Wisdom Labs often work at multiple levels concurrently, we have found it useful to differentiate four levels of engagement: the individual; the group (from a small work team to a community); the social invention; and a larger field of practice and action. This differentiation allows us to frame the initial question or invitation in ways that resonate with the beginning orientation of participants, while holding the possibility of attending to other levels during and through the process.

When Wisdom Labs focus at an individual or a group level, the questions most often focus on issues of identity and role. In this context, within this current reality: *What is ending for me (us)? What is emerging? Who am I (are we) now and what is uniquely mine (ours) to do?*

When Wisdom Labs focus at the level of social invention, the questions shift to the idea and to the structures essential for the cohering of the idea: *What is the essence of the idea or invention that is seeking expression now? What resources and other support structures will be essential for the incubation and maturation of this idea? What may have to end before this idea can take form in the world?*

When focused on the level of the larger field, Wisdom Labs help a group of practitioners discern an emerging whole underneath some seemingly related but not yet integrated practices and developments: *What is the essence that unifies these different practices and developments? What is the next evolutionary leap for this field? How do we begin to describe and relate to these disparate events and emergent practices as a whole?*

We have begun to map these particular contexts, and the level of inquiry that we believe Wisdom Labs are suited for, through the following diagram:

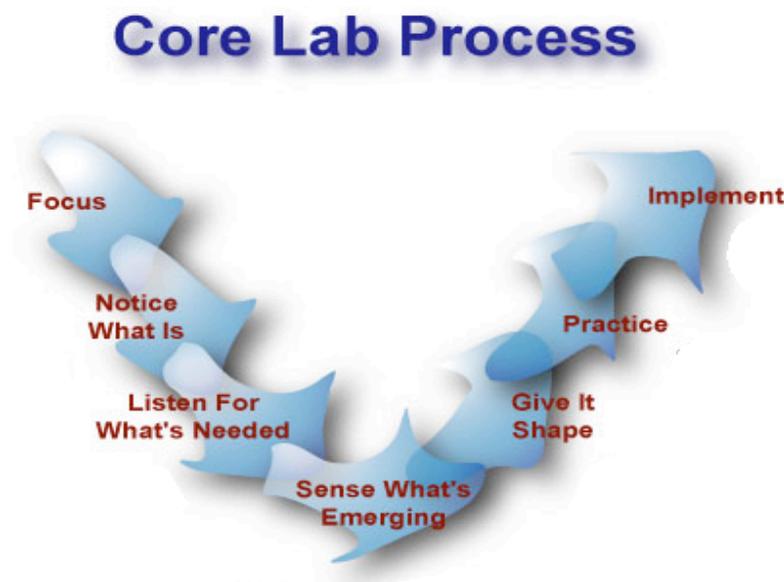


We have found that any level can serve as the entry point or beginning focus for a Lab. Moreover, once a Lab begins, multiple levels will likely need attention. As the group and other relevant parties become aligned with what now is wanting to happen, and discern and commit to the pathway forward, other forms of engagement beyond Wisdom Labs will likely be appropriate and necessary.

Of the 12 Labs we conducted under this research effort: 6 Labs focused on an individual's evolving identity and role within a change effort and emerging field; 8 focused on a group's evolving identity and role; 9 focused on social inventions; and 2 focused on the emerging coherence of a larger field. The individual numbers add up to more than 12 because several of the Labs had multiple foci. Throughout the rest of this paper, we will share vignettes from several of these Labs to help illustrate key concepts.

## The Core Lab Process

We currently represent this process as a series of seven fluid, overlapping stages:



The entire process, and each stage of the process, can unfold at various depths, in varying lengths of time, and employ various individual and group process modalities. What follows is a brief exploration of each of these stages, including stories to illustrate the work of each stage and some of the practices and orientations we have found particularly helpful.

### **Stage 1: Focus**

“With love, compassion, trust, and creativity, be honest and straightforward about what you want, need, and feel, and respect the integrity of these to your nature . . .”

#### ❖ *Beginning a Lab*

Labs begin in several ways: sometimes an individual or group approaches a facilitator with a request; sometimes we have approached others with an offer to conduct a Lab. We have also conducted Wisdom Labs to explore particular questions about the nature of Labs and about the essential practices and conditions required for Labs to succeed.

The beginning stage of any Lab involves a process of discernment by the facilitators and the individual or group requesting the Lab about the initial level of focus: individual, group, social invention, and/or larger field.

Once an initial focus is discerned, the Wisdom Lab facilitators, together with the individual or group leaders who are asking for the Lab, develop an initial design for the Lab, including the number of sessions that may be required, where and when the Lab will occur, and other process details. During this initial period of design, we have often alerted a group of colleagues who support this work to request that they hold the particular Lab in their awareness as the Lab unfolds. A future paper will explore in more detail the role and practices of such a Guide Circle. Sometimes we have engaged in mini-Labs with our Guide Circle to help us gain clarity about the structure and process modalities we want to recommend for the Lab.

Discerning who should participate in the Lab is an essential initial task for the facilitators and the conveners. We have conducted Lab sessions with as few as four people and as many as 120. Sometimes the individual or group calling for the Lab already has chosen the participants who will participate in the Lab; sometimes they ask Lab facilitators to create the group. In either case, some of the considerations that inform who should participate in a Lab include:

- Who is essential to insure that the whole system can be adequately represented?
- Who is essential to insure multiple, distinct, and perhaps divergent perspectives will be represented and welcomed?
- Who is essential to insure that the group as a whole will have access to the skill sets it needs to engage in the modalities likely to be pursued in the Lab?
- Who is essential for the individual or group calling the Lab to feel that their interests will be honored?

❖ *The unfolding invitation*

We have always understood the quality of the invitation extended to each Lab participant as an essential aspect of any Lab. In the Lab we are conducting for the community of Lakewood, Colorado, each of the initial participants was personally invited either by the Mayor or by the lead facilitator. As this group has grown over the 7 months (and counting) of the Lab, new people have joined the inquiry, each time responding to a personal invitation from someone in the group.

We also pay attention to the hospitality extended at the beginning and throughout the Lab as energy to support and amplify the experience of personal invitation. Even the structure and arrangement of the room where the Lab is held can amplify, or block, the energy of invitation. In one Lab, we shifted the seating arrangement in the room from a formal hearing structure to one that helped participants engage with each other as peers and co-learners, despite the profound differences in role and authority that characterized their relationships outside of the Lab.

## ❖ *Beginning a Lab Session*

Those responsible for facilitating a Lab must model through their actions and intentions what a Lab is for and how participants can engage to support the larger inquiry. We have therefore developed a practice of gathering the facilitators prior to the beginning of each Lab session to reflect upon the principles of Wisdom Labs, to give voice to our intentions in this particular Lab, and to center our awareness on the specific inquiry of the Lab and the larger fields within which this inquiry is occurring. We sometimes use this time to practice some of the actions that will begin the Lab session.

We begin a Lab session, when all participants first gather, with some process to focus the group's awareness. In more formal community or corporate settings, this can be as simple as iterative rounds of introductions, inviting participants to declare to each other and to the collective who they are, what drew them to the Lab, and their intentions and hopes for the gathering. In some settings we have engaged in a more developed ritual, including extending acknowledgements and invitations to Spirit and its many manifestations, however conceived of and understood by the group.

Regardless of the focusing process used, we have found it essential to invite Lab participants to pursue a mode of inquiry that transcends the imposition of human will or ideals. To help accomplish this, in some settings, we offer gratitude, both to the land upon which the Lab takes place and to the larger field of awareness and love that holds the Lab. We might also share stories about previous labs, offering images of some of the particular ways we might work with key choice points, including what we might pay attention to or how each of us can contribute.

Regardless of these initial efforts to anchor the group's focus, however, we understand that the focus of the Lab will likely evolve over time. Each Lab opens a portal for a dynamic exchange of invitations to be extended and received at multiple levels of reality. The facilitators and the entire group must return repeatedly to the question of focus, to what the invitation is now and from where and for whom is it arising. The original call and focus of the Lab may not be the ultimate work, or the only work, that is wanting to occur through the portal created by the Lab.

Following the opening process, there is typically some brief process in which we clarify the origins of the Lab, who was invited and why, what our current understanding is of the inquiry at the heart of the Lab, and the anticipated or hoped-for outcomes and products. In our work with two social entrepreneurs, there was a dynamic interplay between a focus on the particular social invention each person was bringing forth, and each of their roles in relationship to the movements that were organizing around the social inventions. In both cases we ultimately bifurcated the process, focusing some lab sessions on the social invention itself, and what the invention now needed to evolve to its next stage, while focusing other lab sessions on the social entrepreneur's changing role and identity.

## **Stage 2: Notice what is**

“ . . . Love the truth of a moment more than anything you might wish would be there. . . . ”

Once the group has developed shared understanding of its focus, the next stage of the process invites participants to explore how the living system that is the focus of their inquiry—whether an organization, a community, a network of relationships, or an individual seeking to impact the larger world—makes it way in the world, its signature way of being. The purpose here is to develop together an appreciation for how this system or systems function as wholes, how they preserve stability and manage change, what dynamic movements are already appearing within the systems, and what structures or patterns of behavior may be preventing the systems from evolving.

Using a variety of methods and tools, including, but not limited to storytelling, role-playing, and simulations, we might:

- Map or depict the diverse stakeholders and perspectives;
- Illuminate the gifts or concerns of each major role or function within the system;
- Examine the current interactions of parts of the system (what happens when...?);
- Surface central beliefs and attitudes that define what’s important and real within the system;
- Distinguish what this system welcomes or includes and what is excluded,
- Notice recurring patterns, and the signals or stimuli that trigger these patterns; and
- Inquire into how the current design of this system compels it to act as it does.

Our intention in this stage is to enter into deep rapport with the living system. We explore the unique way this person, group or community gets along, *not* so we can change or fix something, but rather to cultivate an appreciation for what *is* and why, and to prepare for the next stage, where we will listen for what is needed to enable this living system to take its most natural next step, or leap.

Throughout the Lab, participants are invited to shift their attention back and forth between their perceptions of reality within the larger context they are attempting to affect, and the reality within the group itself as a representation of that larger reality.

To assist the group in this work, we sometimes introduce our adaptation of Ken Wilber’s four-quadrant model that depicts the evolution of consciousness over time. Wilber’s model posits that consciousness unfolds concurrently and interactively through all four dimensions: the individual and group interior dimensions of reality, and the individual and group exterior dimensions of reality. We have adopted this structure to represent different *dimensions of change*. Inviting participants to attend to each of these dimensions of change, both as they relate to the larger system they are attempting to affect and to their experience in the moment within a Lab session, has proven very effective in helping groups embrace a whole systems perspective.

Wisdom Labs in theory invite participants to *notice what is* within all four dimensions of change, both within the larger context they are attempting to affect, and within the group itself as a

representation of that larger reality. In practice, the particular layers and contours of interior and exterior dimensions of reality that participants are called to name and attend to will depend upon the focus of the Lab, and what energies and dynamics appear as the Lab progresses.<sup>2</sup>

### **Stage 3: Listen for what's needed**

“ . . . Try to see what lives in a moment before you put anything there. . . .”

As participants progress and deepen their exploration, the group focus shifts from *what is* to *what is needed* to help evolve the idea or innovation or role or larger field that is the subject of the Lab. That is, the group begins to listen and sense for an action, or understanding, or acknowledgement, or structure that the group intuitively is ready to emerge and be seen now. Individual participants may give voice to what they think *should* be included, or what they want to see, but these reflections are held as data and inquired into for what is underneath, rather than dictating an immediate path to action. The essential questions we invite the group to hold and inquire into during this stage are:

- From a lifecycle perspective, what is this system trying to accomplish, or learn how to do or be?
- What functions are trying to be served, even if only partially and crudely, by what is happening now?
- Are there any signs of a latent structure or function that may only be dimly present or perceived at this time, but may be essential for the long-term viability and sustainability of the system?

For example, in a Lab session with William Ury, co-founder of the Harvard Negotiation Project and co-author of *Getting to Yes*, we focused on his role within an evolving movement to extend the application and uses of his Third Side conflict resolution framework. As the Lab progressed, we noticed that Bill had a characteristic way of initiating and structuring projects that inexorably led to the following pattern: partners would become “seized” with one or more of Bill’s ideas, would immediately begin acting on these ideas in a wide variety of uncoordinated directions, and then when complexity and obstacles emerged, would become fixated on Bill as the source of wisdom. Bill’s response, inevitably, was to feel overwhelmed and withdraw.

In this stage of the Lab process, we invite the group to use the awareness it developed from the previous stage, *notice what is*, to inquire into what it thinks the system is trying to accomplish through a repeating pattern. In the Lab with Bill, we had the group role-play the pattern of Bill generating an idea, sharing it with colleagues, the colleagues becoming seized and moving immediately to action. As chaos began to emerge in the role-play, we asked Bill how he most

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<sup>2</sup> Discerning what dimension of change to attend to, and at what level, is part of the art of facilitating Wisdom Labs. For example, when does a conflict emerging among several of the participants signal a dynamic within the larger system that needs tending, and when is such conflict a distraction from the larger focus of the inquiry? When does an impulse to create collective structure represent right action, and when does such an impulse signal a collective discomfort and resistance to the experience of not knowing?

wanted to respond to what was unfolding. His response: he wanted to slow things down. So we asked him to engage in the role-play with that intention: what would slowing things down look like? Bill moved back into the role-play with this intention, and began to use a particular gesture to reflect the pace and structure he wanted. Partners in the role-play then began to mimic the typical behavior in the larger system, reaching out to Bill to tend to one sensed crisis after another. We then invited the group to inquire underneath this pattern to sense what this system was trying to accomplish, and what function might now be called for, but had not quite developed yet, or perhaps was only faintly present. What the group discovered was a leadership structure that was seeking to evolve a capacity for reflection and self-correction.

The movement from a focus on *what is* to a focus on *what is needed* is subtle, and particularly challenging to many groups. Most of us understand problem-solving: we define a problem, and then apply solutions that have worked in similar circumstances in the past. We are used to moving from a fairly narrow understanding of what is to *what we want* to happen, or what we *think* should happen to fix the problem. Loosening our identification with any particular past solution, and sensing instead for what this particular moment and context is pointing to and calling for, requires discipline and a collective capacity to work with what emerges within the group without trying to force an answer. Yet our experience is that the solutions we uncover through this approach allow us to have more impact, in a more sustainable way, with far less effort of will.

We have found several practices and orientations to be particularly helpful in this stage of the work. Focusing part of the group's inquiry through questions grounded in the life cycle perspective—e.g., What is seeking to evolve here and what functions may be needed to assist this movement? Is this a movement of differentiation, maturation, or is something now coming to an end?—can help shift participants orientation from what they think should be happening to what already is unfolding.

Inviting participants to give physical form to movement they sense within the context or system they are seeking to impact can also help loosen attachment to habituated responses and preconceived solutions.

Finally, inviting the group to sense for what is or has been excluded, either within the lab group or within the larger structure and context the group is seeking to impact, can begin to reveal some of the missing or divergent perspectives that may be needed. In the Lakewood Lab, for example, we have adopted an explicit practice at the end of each Lab session to ask whether there is a voice or perspective that the group senses is missing and now needs to be invited in and included. This practice has led to a gradual expansion of the group to include more youth, people of more diverse ethnic and cultural backgrounds, business interests, and other organizations focused on similar questions of community and identity. Within the Lab sessions, we have invited the group to identify divergent perspectives when they emerge within the group, and then practice holding those perspectives as if all are true.

#### **Stage 4: Sense what is emerging**

“. . . Discern your knowing voice from all other voices, streams of thought, or desires . . .”

This is a stage of relinquishing and discovering. In this stage the group more fully relinquishes its insistence on predetermined paths to action and begins to apprehend the whole of what is, and what is emerging.

This stage is the most difficult to write about and describe. Any words will undoubtedly feel abstract and amorphous.

Participants listen underneath the understanding and insights that have emerged through the group to discern what already is in formation, what already may be taking shape and suggesting a way forward. They pay particular attention to what may be barely perceptible, or what may have begun to be revealed in response to the group’s inquiry into what is and what is needed. The group is feeling into responses that evoke the “quality with no name,” those responses that respond with integrity to the divergent perspectives that have emerged in the prior stages and evoke whole system alignment.

As the group moves into this stage, we typically have only a faint hint of the shape of things to come. Sometimes this stage is full of focused intensity; at other times the energy may barely be perceptible. Often a gesture, a statement, or a set of actions may appear within the Lab session to suggest a potential way forward.

In the Lab session with Bill Ury described above, many in the group were tempted to offer immediate solutions for how Bill could relate more constructively to his partners as they charged in to action. Instead, this stage of the Core Lab Process asks us to heighten our attention to what impulses might be present but barely discernible or distinguishable. With Bill, as chaos began to emerge in the role-play, we asked again, "What is your instinct?" Bill's response was "to go to the mountains, to reflect, to pull back." Rather than dismissing this as wishful thinking, or labeling the behavior as avoidance, the art of the Lab involved paying attention to and honoring what showed up, and then giving this instinct space to unfold and inform the group. As it turned out, this instinct to slow down, pull back and ask “what’s missing?” helped inform the creation of a critical reflective function within several of Bill’s projects.

With a high-tech corporate client, the subtle impulse showed up differently. As the group sat with an impossible situation—a structural trap of trying to respond to urgent and potentially profitable business needs, while constrained by severe budget limits—they did not try to fix the problem or take a "positive approach." Instead they sat in inquiry, exploring what might be trying to happen underneath a recurring pattern of conflict. And then, suddenly, someone asked, "What if they don't know?" That is, what if senior leaders do not see the link between their support for budget restrictions in one area and the risks of severe business consequences in another? The question completely reframed the issue, and invited exploration of many new possibilities for action. Through staying with this question and its implications, group members began to understand that *they* were *uniquely* positioned to provide cross-organizational

information about the trade-offs between making investments in global information technology and cost-cutting budget reductions.

This stage is one of the most challenging for a group to engage, in part because it cannot be scheduled or planned. While this stage is what all prior stages have been preparing for, when it begins to cohere, groups almost always miss it—at least initially. Participants may ignore the impulse that appears, or move too quickly to define and contain it: a comment or perspective may be dismissed initially as a distraction, or a new action may be interpreted in familiar terms that obscure the budding possibility.

In the Lab we held in Galisteo, New Mexico, focused on how to frame and extend invitations to groups who may feel drawn to the work of Wisdom Labs or related processes, there were several moments when some subtle shift in energy and focus happened within the group. Each time the group initially missed it. For example, during an intense dialogue between several participants related to the ethics and consequences of how invitations are framed, one participant felt a surge of energy through her body. She tried to join in the conversation, but was unable to fully bring in what she had experienced, and the conversation went on. After awhile, she again entered the conversation, giving voice to her experience of being unable to continue with the thread of the group exchange and remain true to the energy that had surged through her. Her courage to name that experience, and the level of safety present within the group, helped the group circle back and explore what had happened. This circling back helped the group identify both a call and response dynamic to invitations that had been previously unnamed, and a pace and pattern of engaging that often prevented, albeit unintentionally, more subtle forms of experience from being recognized and named.

This pattern occurred in almost every Lab we conducted over the past two years: a surprising impulse or movement appeared, the group initially missed or misjudged it, and then circled back to re-engage the impulse with a clearer intention to be informed by what was emerging rather than imposing a pre-conceived response.

Of course this pattern could simply reflect our lack of skill as facilitators. Assuming something more telling is revealed by this pattern, however, we believe that Lab participants need to develop specific practices to attend to developments that may point to what is emergent: for example, practices for saying “Stop! What was that?”, or for naming and attending to moments of individual or sub-group disengagement.

### ***Stage 5: Give it shape***

“. . . And cultivate courage of action, so your vision and understanding can be expressed as your life . . .”

As the group begins to sense what is emergent, its work now shifts to experimenting with different forms and shapes for this nascent impulse. The intention of this stage is to help participants try out different forms of the impulse, with different levels of intensity and duration, sensing into what is essential regardless of form, and what may be contextual or ultimately irrelevant. At the same time, the group is also seeking to understand what this nascent impulse is

suggesting about what dimensions of the current reality should be preserved, and what may now need to be repaired or relinquished.

Almost always this stage involves some physical manifestation of what is emergent: a physical enactment, a role-play, or some new diagram or physical model. In the Lab we have been leading in Lakewood, participants struggled to reconcile an impulse to engage residents in short-term, focused dialogues on the City's looming budget crisis, and an impulse to pursue a more deliberate process focused on creating a deeper sense of place and identity across the City. We divided participants into several groups to describe different pathways forward. When we moved to physically map on flipcharts the different scenarios from these workgroups, however, a third option became apparent: a short-term budget dialogue process as a beginning stage of a longer-term community building effort. Seeing this third option emerge visually helped the group experience the consensus latent within their separate proposals.

In the lab focused on Bill Ury's relationships with his partners, we allowed space and time to acknowledge his impulse to "go to the mountains" when partners rushed to action. In this stage, we began to experiment with what that impulse might look like in action. We asked, "How far is far enough for you to feel that you are in 'right relationship' to the partnership?" Bill answered, "Well, actually, it's not so much a static position that feels right, as much as it is the ability to wander and wonder." What felt most natural to Bill was the freedom to circle and observe the projects, taking a larger view and inquiring into what might be missing, what might be needed next. As we explored this impulse, Bill and all of the Lab participants could sense how helpful it would be for this function to be acknowledged, and for Bill to clarify this role up front with his partners. Articulating and incorporating this new leadership function has eliminated many of the conflicts present within Bill's projects, allowing him to more effectively offer his unique talents to the various initiatives emerging around the Third Side.<sup>3</sup>

This is what we mean by *giving it shape*: finding the actions, structures and corresponding principles that enable the system to realize and benefit from what is trying to emerge.

Exploring the function of the emergent gesture or impulse and experimenting with different forms, intensities and time durations generates distinct options. Each option can be tested for its viability and sustainability under a variety of modeled circumstances. All of this is part of the discovery process: trying out different options under different circumstances to discern that system response that participants recognize as most alive.<sup>4</sup>

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<sup>3</sup> At the same time, for the person who has originated a project to wander in and out of key conversations can create tremendous confusion and disarray. Future Lab sessions with Bill will likely explore leadership structures that can effectively accommodate and leverage, rather than become disabled by, Bill's gifts and his preferred style of "wandering and wondering."

<sup>4</sup> We might compare this process to moving furniture around in a room until we discover the arrangement that reverberates with a felt sense of "this is it." Christopher Alexander describes the aim in architecture as looking for a good design, which he defines as one that provides inhabitants with the resources they need to resolve the conflicts that will predictably occur in certain spaces. For example, a good entryway design aids in the transition from the outside to the interior space. Alexander, Christopher, *The Timeless Way of Building*, Oxford University Press: New York, 1979, pp. 114-115.

## **Stage 6: Practice**

The transition between the work of giving the emergent impulse shape and the work of this stage of practice can be rapid, or unfold over several lab sessions. The essential distinction between these two stages: in the prior stage, the group is exploring different forms for the impulse; in this stage, the group has begun to orient to a particular form and is now working to encourage the assimilation of the form and associated practices. In some contexts this may involve group role-plays; in other settings it may mean building and testing a prototype of a particular product or process. The group also begins to test the emerging pathway forward for potential stressors that will need to be addressed or compensated for, and begins to explore what structures and supports will be necessary for moving forward.

The intention of this phase is to give the group as much opportunity as possible to test the emerging forms before having to implement them in real time in their live contexts. The discipline essential for this stage, and for the previous stage of Give it Shape, is for the group to resist a premature rush to conclusion or real-time action, and instead to focus on the emergent form that is taking shape and how to nurture and sustain that form under a variety of conditions.

How would we know if the group has succeeded in this stage of practice? The new shape, process, or structure holds together, even under pressure.

For example, in a Lab session with our corporate client, one of the business units responsible for deployment of global software applications used the practice stage to accelerate learning about the changes that needed to be embraced by globally dispersed teams in order for the new software deployment strategy to work. The Lab session organized a simulation that enabled key stakeholders from around the world to experience the key choice points and challenges that might be encountered by local teams. Problems surfaced immediately; however, because the group was in a Lab and not a real world circumstance, participants could practice how to implement the new approaches that had been discovered in the previous Lab stages. In part as a result of this rehearsal, and subsequent learning from direct experience, HP has dramatically reduced its cycle time and success rate with software deployments. In the words of one IT Director: “Before the Labs, when we used to reach the ‘go live’ point, we encountered disasters. Now when we go live, it’s a non-event.”

In many Labs, particularly those involving intact work groups, this stage often requires the group not only to explore how to implement some new practice, process, or structure within a larger system, it also involves participants practicing how to engage with each other differently when they re-enter the larger system.

For example, in Lakewood, one of the critical insights that emerged from the *notice what is* stage was an awareness of a parent-child dynamic that typifies many interactions between City officials and Lakewood residents. As Lab participants worked to evolve structures to facilitate community dialogues across the City that would help create a different, adult-adult dynamic, they also had to practice how to embody such adult-adult dynamics within the Lab group itself. At one point, the group, which includes some but not all City Council members, became anxious that they did not yet have the endorsement of the entire City Council for their plans to move

forward. As participants continued to explore what was underneath their hesitation, however, they grew clear that they did not need City Council's approval to move ahead. They could begin to act now, even while they invited the Council to endorse the plan at a subsequent Council meeting. The negotiation of this moment of ambiguity within the group provided a tangible opportunity for the Mayor and Council members who are members of the Lab group, and the other members of the Lab group who are not elected officials, to practice a different pattern of relating to each other.

In a different Lab, participants used a conference call to craft the story they would use to frame the proposed change, and to outline what they wanted to give and get in key conversations with sponsors. By walking through these loosely structured preparations, participants practiced how to respond to the anticipated objections and concerns of those they sought to engage.

### ***Stage 7: Implement***

Implementation does not necessarily involve elaborate action planning, although it can; often it requires comparatively small commitments or slight but potent adjustments to existing routines and practices.

For individuals, it is important to translate the insights that emerge from a Lab into specific applications and commitments. When will this new approach be tried? What specifically will be done differently? How and when will the individual have an opportunity to get feedback on this new practice? Groups and communities make agreements about next steps, about who will do what by when to initiate the change. In a Lab focused on a social invention, this stage may involve outlining or designing a different kind of process, such as product development, organization design, or the creation of a support and guidance system.

For example:

- We facilitated a Lab for a program officer at a national foundation focused on the role this officer might play to help develop a new agenda for philanthropy in this country. As the Lab unfolded, the program officer began to recognize the need to redirect some of his attention and energy away from grantees to cultivate learning relationships with other funders, many of whom already looked to his foundation as a model for innovation.
- Following breakthroughs in our work with leadership teams at Hewlett Packard, we asked what would help globally dispersed stakeholders commit to a proposed change of strategy. One approach included the development and interactive sharing of alternative scenarios with stakeholders who did not have direct access to the Lab experiences.
- Participants in the Galisteo Lab now routinely ask themselves, “What invitation is already present here” as they begin to extend the invitation of Wisdom Labs, or similar processes, to new partners.

Of course implementation sometimes involves complex action plans as well. For example, the Lakewood team is now implementing a multi-tiered community engagement process that will engage hundreds of residents in facilitated dialogues over a three-month period.

Regardless of the focus of the Lab, however, in this final stage, participants work to discern what now needs to occur to help what has emerged remain viable and continue to develop well after the Lab is completed. This next phase of work, which happens outside of the Lab, often involves what we might label entrepreneurship, the design of a sustainable system that generates value over time.

## Conclusion

Our intention with this paper was to sketch our emerging understanding of the core principles and process structure that define Wisdom Labs, and to provide some beginning images and stories to suggest the promise of this way of working with groups. In the coming months, we will further refine and extend the analysis that underpins this paper, articulating in greater detail:

- A more in-depth examination of how to work from a lifecycle perspective within Wisdom Labs and other change efforts;
- An exploration of the relationship between Malcolm Gladwell's theory of "thin slicing," developed in his most recent book *Blink*, and the work of Wisdom Labs;
- Particular process modalities that can accelerate the work in each stage of a Lab, including improvisation, Hellinger constellations, embodiment practices, dialogue, and others;
- The multiple roles and functions of a Guide Team in holding the focus and energetic support for a Wisdom Lab; and
- The parallels and differences between Wisdom Labs and other frameworks intended to enable groups to sense and influence the future, including Otto Scharmer and Peter Senge's Presencing model.

We will also develop alternative versions of this paper that articulate the analysis here in language that can be more readily understood and accepted by diverse audiences, from local elected officials and community leaders to senior corporate executives to leaders of complex human services systems and others. This work of translation will require particular care and discipline. We continue to struggle with how to describe the process generally, and what we believe we are cooperating with through the process, in ways that foster understanding and invitation rather than triggering old associations and assumptions that impede communication.

Moreover, even as we work to refine our application of Wisdom Labs, we encounter more questions, including:

- What dimensions of this process are essential regardless of context, and what is dependent upon the context in which the process unfolds?
- What levels of awareness and skills *must* participants have for a Lab to succeed?
- Are their particular dimensions of *any* system that provide reliable starting places for understanding the whole and its current evolutionary trajectory?
- What other conditions are essential for success?

Such questions notwithstanding, we are encouraged by what we are discovering. We are captivated by the possibility that more and more groups, in a wide array of contexts, might learn the practice and grace of seeing what is unfolding and reaching to nurture, support and help shape it, rather than struggling to force predetermined answers into being. Our experiences over the past two years suggest to us that this possibility is not mere wishful thinking, but is real, and growing. Jacob Needleman wrote of this possibility almost ten years ago, in a letter addressed to the Fetzer Institute:

I [believe] that the group is the art form of the future . . . [E]very great culture has created forms of sacred art that were needed in order to transmit and . . . discover by experience the truths which were necessary to absorb into one's life . . . In our present culture, as I see it, the main need is for a form that can enable human beings to share their perception and attention and, through that sharing, to become a conduit for the appearance of spiritual intelligence. . .

It takes no great insight to realize that we have no choice but to think together, ponder together, in groups and communities. The question is how to do this? How to come together and think and hear each other in order to touch, or be touched by, the intelligence we need?"

We believe Wisdom Labs are one emerging form for how to do this, for how human beings can come together in order to touch, and be touched by, the intelligence we need. We look forward to your reflections, and our continued learning together, about how to expand and deepen this human capacity for spiritual intelligence and wisdom.

## ATTACHMENT 1: SUMMARY OF WISDOM LABS CONDUCTED FOR THE FETZER RESEARCH EFFORT

Between January 2003 and December 2004, we designed and facilitated Wisdom Labs across a range of diverse settings in the private, not-for-profit, and public sectors. In most cases, these applications involved intensive partnerships with prominent individuals or groups engaged in the discovery and/or development of significant inventions or innovations in their field. The following table provides a brief description of each partnership, and a list of all Lab sessions conducted as part of the research informing this paper:

<b>Time Period</b>	<b>Convener/ Focus of Lab</b>	<b>Brief Description</b>	<b>Level(s) of Focus</b>	<b># of Sessions</b>
3/03	Lab Prototype	An exploration of the pressures that lead to “bifurcation” for many professionals today, splitting their lives between efforts to generate income and efforts to sustain meaning and engagement with larger Life forces.	Individual	1
3/03 – 12/04	Wisdom Lab Guide Team	On several occasions we used the Wisdom Lab methodology to discern crucial design dimensions and choices for Wisdom Labs.	Group Social invention	4
4/03 – 12/04	Dr. William Ury, Co-founder of the Harvard Program On Negotiation	To discern key personal choices concerning the next stage of his pioneering work, to advance the theory and practice of conflict resolution, and to aid in the discovery and development of key strategies and infrastructure for high stakes projects. Lab sessions included: <ul style="list-style-type: none"> <li>▪ Third Side Circles (6/03)</li> <li>▪ What’s next for Third Side and what is Bill’s to do (10/03)</li> <li>▪ Exploration of what is Bill’s to do (5/04)</li> <li>▪ What is next for the Abraham Walk (11/04)</li> </ul>	Individual Group Social invention Emerging field	4
01/2004	Mark Friedman/ Results-based Accountability	To explore knowledge diffusion strategies for the Results-based Accountability framework, and Mark Friedman’s right relationship to these knowledge diffusion strategies.	Individual Social invention	1

<b>Time Period</b>	<b>Convener/ Focus of Lab</b>	<b>Brief Description</b>	<b>Level(s) of Focus</b>	<b># of Sessions</b>
7/03 – 12/04	Hewlett-Packard	To help an information technology business unit learn how to manage an "intentional evolutionary design" for its global Internet Infra-structure Platforms. Lab sessions included: <ul style="list-style-type: none"> <li>▪ What is the strategy for the merged organization</li> <li>▪ Forming a leadership partnership to guide the organization</li> <li>▪ Partnering across organizational lines with central infrastructure function</li> </ul>	Group Social invention	3
1/04 – 6/04	The Youth Game	An effort to test the value and usability of our Lab methodology as applied to questions and dilemmas facing people with no prior experience with Wisdom Labs or other group processes; this involved nine 13- and 14 year-old middle school students living in Scotts Valley, CA.	Group Social invention	4
7/04 – 10/04	CTB/McGraw-Hill	Assisting a new product development group at this global educational testing company to explore what will be required for successful introduction of a transformative approach to K-12 assessment. Lab session focused on teacher interaction with new report output, and implications for teaching plans.	Group Social invention	1
8/04 – 2/05	National League of Cities and Hewlett Foundation/ Lakewood, CO	To develop community engagement processes to help address short-term budget crises confronting Lakewood (and other 1 <sup>st</sup> tier suburbs), and to develop a more lasting sense of place and identity	Individual Group Social invention	5+
10/04	Anonymous Philanthropist	Exploring ways for an individual to co-evolve his signature approach to leadership with the emergence of a radical new approach to philanthropy.	Individual	1
10/04	Wisdom Labs Guide Team	Lab session to explore what's next for Wisdom Labs	Social invention	1
08/04 – 11/04	Practitioner Colleagues	Lab to explore dynamics of invitation, modalities, and support structures needed for Wisdom Labs and other interventions in large systems	Individual Group Social invention	3
12/04	Democratic Governance Practitioner Partners	To explore shared knowledge and common products from practitioners working in the field of democratic governance and deliberative democracy	Group Larger field	1