



# u.lab 2x

An Accelerator for Systems Transformation  
Journey Overview

# u.lab 2x 2021: An Accelerator for Systems Transformation

## WELCOME

### Welcome to u.lab 2x!

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

An inspiring number of leaders and changemakers like yourselves have responded to our invitation to apply for this Lab. Today, you're joining an emerging community of around 400 teams from around the world, including Brazil, Vietnam, Latvia, Lebanon, Nigeria, Venezuela, Kenya; Netherlands, Bulgaria, and other countries across Europe; the U.S, Canada, Russia, Australia, Japan, India, Malaysia and dozens more.

Some teams come from well-known international organizations. Others are made up of pioneering citizens, students and local organizers. All are working to advance initiatives that range from establishing local circular economies to co-creating education programs in partnership with learners, evolving local food systems to bridging across differences for healthier communities, developing technology to support the scaling of regenerative land use and more – just to name a few.

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

### WHAT YOU WILL FIND IN THIS LETTER

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

- ▶ What is u.lab 2x?
- ▶ Why is the Presencing Institute offering it?
- ▶ What do we need to know now, before the journey begins?
- ▶ What are the key dates for u.lab 2x in 2021?
- ▶ Generally, what will happen from February to June?
- ▶ What are the main elements of u.lab 2x?
- ▶ What time commitment can we expect?
- ▶ How do we prepare for the local, in-person aspects of the Lab that our team will host?

This letter is a starting point, aiming to give you the logistical information you need to begin preparing for u.lab 2x. **At the beginning of February, we will make available the materials for the course and a source book** to support you in the design and facilitation of your process. If you have specific questions that aren't answered in this document, don't hesitate to reach out. We will do our best to respond promptly.

Contact: → [u.lab@presencing.com](mailto:u.lab@presencing.com)

Warmly,  
The u.lab 2x team

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## THE BASICS

### INTRODUCTION

U.lab 2x convenes **teams** who are working to bridge the environmental, social, and spiritual divides of our time. It is designed to put you in the driver's seat of change. The resources and facilitation support we will provide through our online platform, and the spaces for dialogue with your peers, will help you to:

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

The Presencing Institute will facilitate this process by training your core team (see *the section on* 🔄 *Key Lab Elements & Definitions for more detail*) to use systems mapping tools, sensemaking methods, embodiment practices, prototyping processes and apply them to the initiative you've brought into u.lab 2x.

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

### WHY THE PRESENCING INSTITUTE IS OFFERING U.LAB 2X

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

We believe true leadership today is the capacity to facilitate a shift of mindset in multi-stakeholder groups from a narrow understanding based on self-interest (ego-systemic) to one where decisions are made based on the wellbeing of the whole system (eco-systemic). We call this capacity Eco-System Leadership. This Systems Transformation Accelerator aims to build this type of leadership capacity at scale, across multiple sectors and geographies. Ultimately, the aim of u.lab 2x is to activate a global ecosystem of innovation that works to ensure wellbeing for all.

### PRE-REQUISITES

U.lab 2x will jump directly into more advanced presencing practices. All participants are therefore expected to know the basics of Theory U, as introduced in u.lab 1x and 🔄 **Theory U**, prior to beginning the u.lab 2x journey in February. We strongly encourage all core teams members to read 🔄 **The Essentials of Theory U** (2018) before beginning u.lab 2x.

## THE U.LAB 2X TEAM

Bios for team members are available [↗](#) here on the Presencing Institute website.



Olaf Baldini



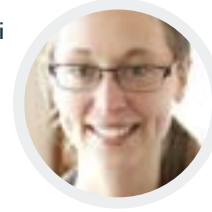
Otto Scharmer



Florentina Bajraktari



Kelvy Bird



Sarina Ruiter-Bouwhuis



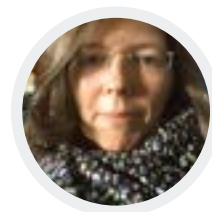
Rachel Hentsch



Stefan Day



Eva Pomeroy



Angela Baldini



Arawana Hayashi



Geraud Bablon



Antoinette Klatzky

## JOURNEY OVERVIEW

Here is a high-level overview of what happens when during u.lab 2x. Use this timeline to begin preparing for the journey ahead, which begins in early February and goes through May. This will help you prepare the design and facilitation of individual sessions and your overall process.

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

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

### CORE TEAM

That's you! The group of participants who took the initiative to apply to u.lab 2x. This group will learn various Theory U-based methods and apply them locally or in a shared 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.

### EXTENDED TEAM

This is an extended group of stakeholders in your project / initiative, who will participate in the the u.lab 2x process with your core team. You should begin reaching out to these stakeholders now. Between your core and extended teams, you should aim to 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. 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.

Generally, teams need to be co-located or able to meet in person at minimum once per month. That being said, the ideal scenario is to have a regular weekly team time that is either being used for the monthly global zoom sessions (as specified below) or, during the off weeks, for engaging locally in the practices of the month. In times of a global pandemic, it might not be possible for your team to meet physically for workshops. Together with the community, we've been able to prototype virtual ways of adapting the practices, and can continue to do so together.

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## JANUARY 2021

- ▶ Core teams should continue their outreach to potential **extended team** members.

**Important:** *by mid-February, you will need to have assembled a team of minimum 7-10 people (including core and extended).*

Use this syllabus to understand and communicate the benefits of participating and the likely time commitments.


- ▶ It is also important to think through how you wish to organize yourselves, including team roles, communication channels, how you wish to deal with resources, how often you wish to meet, online or offline, where, etc. In discussing this, it might be helpful to roughly take into account this recommended monthly rhythm:
  - ▶ **Week 1** (Kick-off Feb 18<sup>th</sup>): **Attend the Live Zoom Session** to share experiences and reflect on practices together..
  - ▶ **Week 2: Read and review the course material** for the current month / module on Sutra, engage with the community, and clarify any question you have.
  - ▶ **Week 3: OPTIONAL Ask Us Anything Zoom Session** (+- 90min / Dates to be confirmed)
  - ▶ **Week 3 / 4: Meet with your core team** to prepare and hold the workshop/activities for the current module with your core and extended team.
- ▶ **Make the most of your time until February to refresh yourself on Theory U basics** by reading → **The Essentials of Theory U** (2018), reviewing → **this short video series**, or joining the 2-hour U.Academy course → **"Meet Theory U"** on February 2nd. Not all of your team may be familiar with Theory U. That's okay, but it will help to start in February with a common vocabulary and mental models, and the resources above can support that. Of course, all content from → **u.lab 1x** will remain available on edX until May 2021, and it isn't too late for new team members to enroll.

## FEBRUARY 2021

- ▶ The February module focuses on helping your core team to co-initiate and prepare for the journey ahead. The February **zoom orientation session** and the **source book** are designed to offer guidance for your core team on three essential parts of Co-Initiating:

- ▶ How to build a strong container for your core team
- ▶ How to clarify and refine your team's shared intention
- ▶ How to ensure the right stakeholders (**extended team**) have been invited to participate in the journey.

- ▶ The February session will also provide an **orientation** to the platform where you'll find all the u.lab 2x resources, including: course material, societal transformation issue areas, team spaces, and whole-lab conversation spaces.

- ▶ **Early February:** Invitations to join u.lab 2x on the  **Sutra platform** will be sent out to each member of your core team, along with instructions for how to set up your team's space on the platform.

FEB  
18  
2021

- ▶ **Week 1: February 18th: Zoom Session on Co-Initiating.**

 **9:00 am - 10:30 am ET**  *calculate time in your time zone here*

**All members of your core team should participate** (to the degree possible).  
Teams can meet virtually (no in-person gathering required).

- ▶ **Week 2: Review the source book and share any questions** you have on the u.lab 2x platform.  
In this first month we will provide extra technical support to get you and your team set up on the platform.
- ▶ **Week 3: OPTIONAL Ask Us Anything Zoom Session** (+- 90min / Dates to be confirmed)
- ▶ **Week 3/4: Prepare and hold the 3D mapping workshop** with your core and extended team.



## MARCH 2021

The March module focuses on the actual launch with the full (core + extended) team. It includes an introduction to how we think about creating profound change in social ecosystems from a Theory U perspective. **The emphasis is on seeing from deeper levels of the iceberg.** In this first phase of co-sensing, participants will apply co-sensing methods to their own initiative. This involves mapping out the system and *going to the edges of the system* to gather the key observations and insights. These practices establish a better understanding of how all the stakeholders experience the current situation – particularly the ones that are most marginalized, who we often know the least about.

Through this module participants will learn new ways of perceiving blockages, needs, and opportunities in their stakeholder systems, using various levels of systems-thinking analysis: from symptoms down to the deeper root issues at play.

MAR  
18  
2021

- ▶ **Week 1: March 18<sup>th</sup> – Zoom Session on Co-Sensing**  
🕒 9:00 am - 10:30 am ET ([📍 calculate time in your time zone here](#))

**Core team members & interested extended team members can join.**

- ▶ **Week 2: Review the source book and share any questions** you have on the u.lab 2x platform.
- ▶ **Week 3: OPTIONAL Ask Us Anything Zoom Session** (+- 90min / Dates to be confirmed)
- ▶ **Week 3/4:** No workshops this month. Instead, **prepare and conduct your learning journeys** and/or stakeholder interviews.

## APRIL 2021

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

APR  
15  
2021

- ▶ **Week 1: April 15<sup>th</sup> – Zoom Session on Presencing**  
🕒 9:00 am - 10:30 am ET ([👉 calculate time in your time zone here](#))

**Core team members & interested extended team members can join.**

- ▶ **Week 2: Review the source book and share any questions** you have on the u.lab 2x platform.
- ▶ **Week 3: *OPTIONAL* Ask Us Anything Zoom Session** (+- 90min / Dates to be confirmed)
- ▶ **Week 3/4: Meet with your core team** to prepare the 4D mapping and hold the session with your core and extended team.

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## MAY 2021

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

MAY  
13  
2021

▶ **Week 1: May 13<sup>th</sup> – Zoom Session on Prototyping**

🕒 9:00 am - 10:30 am ET [📍 calculate time in your time zone here](#)

**Core team members & interested extended team members can join.**

- ▶ **Week 2: Core team members read and review the Prototyping material** and share any questions they have on the u.lab 2x platform. Optional for extended team members.
- ▶ **Week 3: *OPTIONAL* Ask Us Anything Zoom Session** (+- 90min / Dates to be confirmed)
- ▶ **Week 3/4: Meet with your core team to hold the workshop, experiment with prototypes and iterate.** If possible, try and maintain a weekly meeting with your core team.

## JUNE 2021

**Cross-cohort sharing and celebration!** We will gather one last time to close the 2021 2x journey, honor the time we spent together, and share some of the stories and prototypes to co-inspire and help co-evolve our ecosystem collectively (date to be confirmed).

**Core team members & interested extended team members can join.**

## LOGISTICS

### IN-PERSON REQUIREMENTS

Core and extended teams should gather in-person **at minimum** once a month to apply the u.lab 2x methodologies together. **We highly recommend that this gathering take place before the zoom session at the end of each month** (see detail in the → *Key Lab Elements & Definitions* section) as we will be reflecting on our experience with the practice during the session.

If possible, we recommend that teams meet **on a weekly basis** for the various activities of the u.lab 2x (outlined in the Journey Overview section above). Given the current global pandemic, it makes sense that many teams might not be able to meet in person, but gather virtually instead. If you do meet in person, it is also okay to have one or two virtual team members -- just make sure that they can join the sessions via video-conference whenever possible.

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

As mentioned in the → *Key Lab Elements & Definitions* section below, the u.lab 2x methods are designed to create a shared language and understanding of the intellectual and emotional complexity in stakeholder relationships. They are multi-stakeholder transformation methods that involve making systems maps out of physical materials and using embodiment practices (Social Presencing Theater) to explore the evolution from current reality to emerging future possibilities. For these reasons, doing them virtually means losing some of the quality of the space and some of the sensing data that you would have access to in person. Nonetheless, we understand that our current global situation has shifted, and the previous u.lab 2x cycle has demonstrated to us how creative teams can get online adaptations of these practices, too.

### TIME COMMITMENTS

#### **Core Team**

On average, core team members can expect to commit 4-5 hours per week toward u.lab 2x. While this is an average estimate, those hours may not be evenly distributed throughout a month. Weeks in which teams are engaged in applying methodologies will require more time, while other weeks will require less.

#### **Extended Team**

On average, extended team members can expect to commit 2-3 hours per week toward u.lab 2x. The same variability described above for the core teams applies to extended teams.

### HOSTING LOGISTICS

#### **Space**

It is important to ensure your team has a suitable space to meet and engage in the practices - whether physical or virtual. A suitable in-person space typically consists of:

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

#### **Finances**

While participation in u.lab 2x is free for teams, teams are fully responsible for all costs incurred from their participation in u.lab 2x.

## SHAPING YOUR EXPERIENCE

The structure described above has been developed based on our experience and your feedback about what works best. We recognize that the timeline described above won't work for everyone and it is important to make the process your own. Here are three examples that we have seen of ways teams engage with u.lab 2x.

**Scenario One:** The Core Team meets weekly. The group plans, prepares, and facilitates monthly sessions for the Extended Team using the methodologies provided. In addition, the core team uses weekly meetings to clarify and set intention, organize and conduct learning journeys/stakeholder interviews, crystallize insights and design, and execute and iterate prototypes. This is the structure we recommend.

**Scenario Two:** The Core Team prepares and facilitates one half-day workshop each month (March, April, May) for the Extended Team using the methodologies provided. When the sessions are well-prepared, this can also be an effective structure for evolving your project or initiative.

**Scenario Three:** While we don't recommend u.lab 2x for multi-local teams, we do know a number of groups are partially or entirely virtual, especially in these times. Previously, these groups have found ways to connect virtually around the principles of the process and then to come together for one intensive in-person event, often integrating all of the practices in one extended workshop of 1-3 days. In light of the pandemic, this might work if you know that the whether will allow for outside meetings, or if you want to plan this workshop intensive during one online marathon. To make this work, a lot of careful thought and planning will need to go into the design, to ensure everyone remains engaged. Also, remember that people have a limited capacity for sitting at their screen in one stretch.

**Scenario Four:** Mix and Match all of the above and create a design tailored to your context and your needs!

## INTELLECTUAL PROPERTY

The Presencing Institute has developed a suite of "PI.x" brands, to provide groups affiliated with our various programs a unifying identity in their materials. The core intent of PI.x is to support prototype initiatives that align with the core mission of the Presencing Institute: action research at the intersection of science, consciousness, and profound social change. It also aims to align work with Theory U as a change framework.

You can download the u.lab 2x – Presencing logo along with instructions of "dos" and "don'ts" [→ here](#).

## KEY LAB ELEMENTS & DEFINITIONS

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

### Acupuncture Points:

When you applied to u.lab 2x, you applied to a particular issue area (what we refer to as acupuncture points). Teams across tracks will all have access to the same methods, tools and Lab processes. On the u.lab 2x platform, you'll find specific topic areas related to the acupuncture point(s) most relevant to your prototype. In parallel to the methods and tools we offer each month, we'll use these spaces to surface what teams are learning about creating change in these specific issue areas around the world.

### 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 their own context) to the issue / challenge / prototype they are bringing to the Lab.

### Extended Team:

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 7-10 participants to be together in-person. Therefore, core teams are asked to convene an extended team of stakeholders who will participate in some (or if they wish, all) of the STL journey.

### Live Session:

On April 15th, in addition to holding zoom calls, we will have a live session – a 45 minute live broadcast that brings together the entire u.lab 2x community worldwide, in real time. *Unable to gather during the live session? Not to worry. A recording will always be available so that teams in places like Australia don't have to gather in the middle of the night.*


### Office Hours:

Office Hours are short recorded sessions where members of the u.lab 2x team respond to the most common questions surfacing at each stage of the journey. This Office Hour recordings will be posted on the u.lab 2x platform.

### u.lab 2x Course:

Within the u.lab 2x platform (on Sutra), we'll offer a "Course" – but you can think of it more as a series of lessons designed as a toolkit to help you learn and apply the Theory U-based methods we'll offer in u.lab 2x.


### u.lab 2x Platform:

Your go-to place for all Lab resources, and the place you'll find and interact with other participants from around the world. The Lab will be hosted on  **Sutra**. We will invite you to join the u.lab 2x space on Sutra and to offer some time for you to familiarize yourself with how Sutra works.

### u.lab 2x Team:

a small team of facilitators from the Presencing Institute who have designed and will facilitate the u.lab 2x.

### Zoom Session:

Using  **Zoom**, core team members (and interested extended team members) will have the opportunity to join monthly, interactive video conversations facilitated by the u.lab 2x team, to share challenges, learning and reflections across teams and across issue areas.

## **WHAT'S NEXT?**

**We're so excited  
that your team is joining u.lab 2x!**

Be sure to review the timeline above to clarify your team's next steps  
and reach out if you have any questions

**Until February!**

The u.lab 2x Team