ADVANCES IN PRESENCING

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A timely anthology showcasing Theory U and presencing perspectives from the latest research of practitioners in the field
CHAPTER 5
Tending the Social Field in Higher Education
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Introduction

Scharmer (2017) describes the future of education – 4.0 Education - as co-creative and innovation-centric, with a distinct new role for the learner and educator (see the Matrix of Educational Evolution below). A key feature of education 4.0 is that learning does not come from a designated teacher. Instead, learning is sourced from the entire social field (Scharmer, 2017). If the source of learning is the social field, then the central question of concern for the educator is how to cultivate the kind of social field that gives rise to meaningful learning.
The emergence of u.lab – the online-to-offline MOOC offering based on Theory U (Scharmer 2016, 2018; Scharmer & Kaufer, 2013) – offers the opportunity to ‘explore through doing’ the principles and properties of 4.0 Education. In this paper we share such an exploration in the context of higher education by reporting and reflecting on our experiences hosting the Concordia U.lab Social Innovation Hub from 2016 to 2019.

The original vision for the Concordia U.lab Social Innovation Hub was to create a learning space where the university community and the local community could come together to engage collectively in a mindfulness-based process of change and social innovation. More explicitly, we used the u.lab process and the Hub format to:

- bring together undergraduate and graduate students, faculty, staff and members of the local community as co-learners.
- embody Sharmer’s conceptualization of education as a process of learning in direct contact with the community (“breathing in”) to then go into the world and be in ser-
vice of such community (“breathing out”; Scharmer, 2019)
• support a deep cycle of learning that connects personal transformation to systems change.
• create a collectively-sourced learning community where members contribute to the process in a variety of ways, including in the design, facilitation and evaluation of the experience.

The core principle guiding the design of the Hub was to find the minimal structure that allows people to self-organize in meaningful ways. Thus, our intention in hosting the Hub was to design and hold a process that supports people’s natural capacity for self-directed learning, within an emergent transformative learning context.

U.lab in the Context of Higher Education

u.lab exists at the convergence of two streams of innovation in higher education. The first is the move, over the past several decades, away from didactic models of teaching and learning toward those that a) recognize learner agency and b) view transformative learning as the pedagogical aim of adult education. Writing at the end of the last century, learning theorist John Heron commented on the “radical change” in higher and adult education taking place on both a theoretical and practical level. He commented, “[T]he basic and very simple premise of this change is that student learning is necessarily self-directed: it rests on the autonomous exercise of intelligence, choice, and interest” (Heron, 1989, p. 12). Twenty years later, we see abundant evidence of this radical change, one that shifts us from a consumption model, where knowledge is ingested for the purpose of reproduction, to one that is more holistic and instead focuses on empowering individuals to “become capable and honorable scholars, citizens and human beings” (Berger, Woodfin and Vilen, 2016, p. 5). The new emphasis reflects growth in and the emergence of domains of study and practice including community-engaged learning, transformative learning, self-directed learning,

The second, equally disruptive, innovation in education has been brought on by technological advances: online learning. Technology has enabled the creation and growth of e-learning, blended learning, and flipped classrooms, for example. Perhaps the most disruptive of the online learning spaces is the MOOC (massive, open, online course), widely acknowledged in the literature as a disruptive force in higher education (Flynn, 2013; Robertson & de Aquino, 2015; Viehland, 2014; see Al-Imarah & Shields, 2018 for debate about the nature of this disruption).

Pedagogically, u.lab aims to “put learners in the driver’s seat of learning” (Scharmer, 2015), reflecting the trend toward self-directed learning. Its intention has also been explicitly transformative, as implied in the course’s original subtitle – Transforming Business, Society, and Self. U.lab is also a MOOC, which means that the learning process is radically accessible – essentially available to anyone with access to the internet. As such, u.lab leverages new educational technology to amplify the pedagogical revolution in adult learning by making social technology for transformative learning available on a global scale. Thus far, over 160,000 people across 185 countries have participated in u.lab (www.presencing.org).

Social fields, containers, and holding spaces

If the source of learning is the social field, we need to give some consideration to the question: what is the social field? In Theory U, the social field is a way of understanding collectives, or social systems, that includes both their observable qualities, and those that are less visible. By definition the unseen dimensions of a collective are not possible to observe. Instead, they need to be experienced. The social field, then, is a view of the social system that takes into account both the outside view (the third-person)
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and the experience within (the first- and second- person views). It places a particular emphasis on, “the source conditions that give rise to patterns of thinking, conversing, and organizing, which in turn produce practical results” (Scharmer, Pomeroy & Kaufer, 2021, p. 3). In other words, taking a social field perspective means paying attention to the quality of the collective space, the source of that quality, and its potential as a generative force.

This notion of the field in Theory U draws from Isaacs’ earlier work. Isaacs (1999) describes the field as, “the quality of shared meaning and energy that can emerge among a group of people” (p. 242). He comments further,

We cannot manufacture a “field”. But we can create conditions under which a rich field for interaction is more likely to appear. These conditions make up what we have called the container for dialogue, in which deep and transformative listening becomes possible. You cannot work “on” a field. But you can create a “container”.

Creating such containers is integral to the Theory U process. Scharmer (2018) states, “profound change happens in places, and this place needs to be intentionally created” (p. 102). He describes the container as, “the holding space that shapes and cultivates the web of relationships (Scharmer, 2018, p. 81-82). In 4.0 Education, the role of the educator is primarily about cultivating a holding space where transformative learning can take place.

The importance of the holding space in transformational work can be traced back to British psychoanalyst Donald Winnicott, who referred to “space” as a psycho-emotional construct where individuals and groups’ development unfolds. Winnicott referred to “potential space” or “transitional space” as “the area that is allowed to the infant between primary creativity and objective perception based on reality-testing” (Winnicott, 1982, pp. 239-240). The potential space and the transitional objects that populate it provide a playground that exists between pure imagination and the objective world, where futures can be envisioned, possibilities entertained, past comforts recalled, and uncertainties managed. Winnicott also referred to “holding” as a key feature of
a relationship that fosters an individual’s positive exploration of such transitional space. “Holding” literally refers to a mother’s holding her baby in her arms, and metaphorically to many other expressions of care offered by the parent. Although this notion of development and holding are based in childhood, Winnicott saw them as paradigmatic for later life. As the individual grows, the holding environment expands to include the father, the family, and all the various groups and experiences in which the person participates. The quality of such holding, or “the sense in which it engenders basic trust in one’s surroundings, determines the extent to which the person can become a genuine, creative individual” (Van Buskirk & McGrath, 1999, p. 808).

The concept of holding space was adopted by psychoanalysis to refer to the therapist’s attempt to create a safe emotional space in which the patient can experience and integrate a wide range of difficult emotions (Yogevo, 2008). From psychoanalysis, the “holding” metaphor was adopted in new contexts such as education, particularly transformative and self-directed learning. Here, ‘holding space’ refers to features of the context that facilitate these types of learning, such as the presence of credible role models and the creation of a non-threatening learning environment, where participants feel free to experiment with what they are learning without feeling the threat of failure (Manz, 1991).

Scharmer (2016) provides some nuance to the dynamics of the relationship between transformation and holding space, “profound shifts in small groups tend to happen when the courage of risk-taking is supported by a holding space of deep listening with unconditional love” (Scharmer, 2016, p. 246). Bird (2018, p.37) also describes the connection between the quality of the holding space and the interactions that happen within it. She states,

The weakness or strength of the container determines the likelihood of detrimental or successful conversation, for harmful or loving relations, for destructive or productive environments, for ill- or well-being.

Previous research into participants’ experience of u.lab found that part of the effectiveness of the u.lab learning process is that
it offers two levels of holding space – one global and one local (Pomeroy & Oliver, 2018). On the global level, the core u.lab team, comprised of Otto Scharmer and his direct collaborators, holds the process through the design and delivery of the content, as well as through online interaction. At the local level, participants are encouraged and supported to create their own learning spaces in the form of hubs, or “place-based local communities of change” (Presencing Institute, 2015). The Concordia U.lab Social Innovation Hub was one such place-based hub.

The Concordia U.lab Social Innovation Hub

The Concordia U.lab Social Innovation Hub was held annually in the autumn term each year from 2016 to 2019. The Hub was held by a hub host team made up of 3-4 people including a faculty member (first author) and graduate students (including second author). In two of the four years, the team included an undergraduate student and one year a member of the community joined the core holding team. Each week the Hub would come together to move through the u.lab process as a learning community. Initially the group met for nine weeks, eventually increasing to eleven.

The composition of the group varied from year to year, however approximately one-third of each cohort was made up of undergraduate students participating as part of the for-credit course Leadership, Change and Social Innovation. Another third came from other groups within the university – graduate students, staff and faculty. The final third were members of the local community, including people working at and leading community organizations, social entrepreneurs, coaches/consultants and other citizens.

In the months leading up the Hub, the host team engaged in outreach both in the university and in the local community, and held three two-hour “taster” sessions to introduce people to the u.lab process and the Hub.

Once u.lab began in mid-September, participants were asked to review the online material in their own time and at their own
pace and the weekly in-person sessions were used for peer coaching, dialogue, and reflection exercises relevant to the course. One of the key practices in u.lab is the Coaching Circle. Small groups of 5-6 people met regularly during the hub to ‘work’ with the case of one group member. The group followed a structured process that allowed the case giver to share a current situation in which they are a key player and where gaining insight in the present moment would make a big difference moving forward (https://www.presencing.org/resource/tools/case-clinic-desc ). The group members then act as coaches and provide feedback in non-traditional forms, such as metaphor, feeling, drawing and gesture.

Gatherings lasted 2 ½ to 3 hours. Although each session was different, the format below is representative of the process:

<table>
<thead>
<tr>
<th>9:30-10:00</th>
<th>Session opening, including some form of check-in.</th>
</tr>
</thead>
<tbody>
<tr>
<td>10:00-11:00</td>
<td>Large group exercise around a theme (such as co-initiating or prototyping), Open Space or small group dialogue</td>
</tr>
<tr>
<td>11:00-12:15</td>
<td>Coaching circles</td>
</tr>
<tr>
<td>12:15-12:30</td>
<td>Closing</td>
</tr>
</tbody>
</table>

**Figure 2.0 Gathering Schedule**

At four points during the course, the core u.lab team hosted a live session broadcast from MIT, which we would watch as a Hub, followed by dialogue groups around the themes raised in the live session. In those weeks, we did not hold coaching circles. We convened once again in mid-December each year to reconnect, watch the final live session and share progress on initiatives.

As a hub-team, we shared the responsibility for organizing, hosting, designing, and facilitating the Hub. Further, we invited and indeed requested that members contribute in any way that
they were able, for example helping to set up and clear up the space, bringing snacks, contributing to the evaluation and design of the sessions, facilitate, and document the experience through photos, videos and blogs (see Figure 3).

![Figure 3.0 Task List](image)

The size of the Hub varied from year to year, with some attrition during the process each year. In the initial two years, approximately 30-45 people came together each week, growing to 45-55 in the latter years.

Inquiry Framework

The Concordia U.lab Social Innovation Hub was a new endeavor and an entirely new kind of university classroom for us. In the first year of the hub, the host team met after each session to debrief and design the following week’s session. At the end of the first year, we realized that our weekly debrief would benefit from more structure, so we designed an inquiry process that evolved over the subsequent three years. Our aim was to engage
in a consistent, intentional inquiry into the experience that would:

- help us better understand participants’ and our own personal experience of the learning space
- sense into the evolution of the learning community
- respond effectively as facilitators to the emerging needs and direction of the collective
- surface and make visible a new way of being and learning in a university setting
- generate knowledge that serves practice

One of the most interesting features of the weekly inquiry process emerged early on in the first year of the Hub. A community member asked to join the debrief session. His input was so helpful that we opened the debriefs to the whole Hub community and continued to do so from that point onward. On any given week, between two and ten Hub community members joined the host team for the debrief.

We selected six reflection questions to guide our debrief and asked these questions of ourselves consistently every week. When the session was over, the hub host team and any hub members interested in participating found a space in the gathering room and posted our inquiry questions on the wall. Some questions focused directly on evaluating the session that just took place, others focused on developing our understanding of the nature of the experience and what was emerging from it, and one focused explicitly on next-step action. Over the period 2017-2019, our intention for the hub clarified and this can be seen reflected in the evolution of our inquiry questions over time.
Figure 4.0 Evolution of Inquiry

Just as our intention evolved, so did our inquiry process. In reflecting on our 2017 inquiry experience, we were drawn to developmental evaluation, with its emphasis on generating framing questions and its particular focus on the overarching question, what is being developed? (Patton, 2011, p. 229). Patton describes the appropriateness of this approach for complex situations. He states, “Developmental evaluation tracks and attempts to make sense of what emerges under conditions of complexity, documenting and interpreting the dynamics, interactions, and inter-
dependencies that occur as innovations unfold” (Patton, 2011, p.7). We found developmental evaluation provides a framework that offers enough consistency for us to see developmental patterns over time, with enough flexibility to surface and respond to emergence in a new and innovative learning context. The question ‘what is being developed’ surfaces in 2018 and is refined the following year.

In addition, we added a new element to the inquiry process to help us meet our two primary tasks - to engage in generative reflection dialogue and to design the session for the following week - within the allocated time frame. When we gathered, we would first take 5 minutes to journal individually in response to the inquiry questions. This helped us to remain focused on our purpose and intention – to sense into the collective and the evolving learning journey. After that point, we would engage in open dialogue for half of our remaining time, ensuring we touched on all of the inquiry questions. The final segment of debrief focused on sketching a design for the next session based on our sensing into the needs, dynamic and evolution of the collective. The structured inquiry process supported the iterative cycle from action to reflection and back to action, generating greater consciousness and understanding of the Hub experience as it unfolded.

Holding Emergent Learning Spaces

To reflect on and share our learning about holding an emergent, transformative learning space, we draw on our weekly debrief records. The comments that serve as our data were generated in weekly debrief and design conversations between the hub hosts and participating hub members. Often those who chose to participate were members of the local community or graduate students. Occasionally, undergraduate students would also participate. We treat the data as a record of our collective reflection and, therefore, do not differentiate contributions of Hub members from contributions of Hub Hosts.

In our effort to cultivate a generative social field, three aspects
of the experience held our attention:

- Course content
- Structure and session design
- The emotional-psychological space

The *content* shaping the learning process was largely provided by u.lab. It included both conceptual input and processes, and focused on skill or capacity-building. This kind of learning was highly valued by Hub members who commented on learning skills such as deep listening, collaboration, leadership and self-awareness, as well as learning tools and practices deemed useful to engage as agents of social change. Often these surfaced in response to the question: *what is being developed?*

Concrete tools, in this case body awareness and social presencing theatre (SPT), that draw upon competences and ways of being that are usually left out in higher education.

how and when to lead and when not.

People are not just learning about the world, about saying the right thing, but people are learning how to listen to another person.

soft skills, stillness, deep listening, self-awareness.

A new methodology of research, of individual search, a way of deciding, and to design projects; we are learning at the edge, we are learning and researching as we go, like in action research.

Working with already-established content allowed us to focus on the other two dimensions shaping the learning space: structure & session design and the emotional-psychological space. Although more attention has been paid to these dimensions in higher education in recent years, in many university classrooms they remain overshadowed by an emphasis on content delivery.

As mentioned, in thinking about the *structure and design* of each weekly session, our core design principle was to find the minimal structure that allows people to self-organize in meaning-
ful ways. As such, we paid a great deal of attention to the structure and design of the weekly sessions and the extent to which they supported this kind of self-directed, transformative learning.

Integral to our consideration of structure was our concern for the emotional-psychological space of the Hub. This consideration was grounded in an understanding that transformational learning experiences are often characterized by a level of discomfort (Brendel & Cornett-Murtada, 2018; Conklin, Kyle & Robertson, 2012; Illeris, 2017; Mezirow, 2000). As psychologist Carl Rogers commented, “any significant learning involves a certain amount of pain” (in Illeris, 2017, p 43). Knowing we were working with a transformative learning process, we needed to be attuned and responsive to the emotional-psychological dimension of the learning experience.

Below we share our reflections on key aspects of holding the emergent learning space where the structural and emotional-psychological dimensions intersect: responsiveness, holding discomfort, flexible structures, sufficient stability and the quality of attention.

Responsiveness

A key aspect of supporting the holding space was to remain in contact with, and responsive to, the week-to-week experiences of the community. Each week we asked, “what is our sense of our collective place in the journey” and used this as a point of departure for planning the next session.

right now we have a sense that the collective is not feeling like a collective yet, so we are going for this kind of soft closure that does not force an identity of the group.

sense the energy shifted and there is a desire for speed; we need to seek ways to help people slow down.

When we were unable to connect with the collective experience, for example after a Social Presencing Theatre session held
by an invited facilitator, it was a source of distress.

What can we find out about how today went: Are people connecting the dots? Are they following the material online and putting it into context? We are doing a lot of stuff but is it making sense and is it perceived as coherent and relevant for people?

Connecting with our sense of the collective each week was the core practice that enabled us to hold the space for a generative social field to emerge. We will return to this point in our discussion.

Holding discomfort

The theme of discomfort did surface at times in the weekly debriefs. The source of this discomfort varied. In the early years, the structure of the classroom itself was unsettling for some learners. The discomfort associated with a new learning process and environment, especially for students enrolled in the course, surfaced through the theme of chaos – either real or perceived – and we saw ourselves as sitting on the edge of chaos and order.

Our sense of the collective is that, on the one hand, we are forming, gelling, crystallizing and, on the other, we are in chaos.

There is still a sense of chaos/uncertainty/feeling unsettled; we seem to be holding that space.

There was also some discomfort with the transformational nature of the learning process itself.

I am stepping out of my comfort zone.

The tricky thing here is that we are learning about this process at the same time as trying to apply it. This is not easy. I feel exhausted. It is a high demand. I need to know in which piece I am, am I in the learning, or in the doing.
Here for me it is more about learning, it is too much to have the doing happening at the same time.

The ‘chaos’ here seems to be more about the individuals in the hub feeling unsettled by the process rather than chaos due to context. Response to this seems to be simply holding or ‘being with’ the chaos, rather than acting on it.

Our sense holding this space was that the discomfort that could be experienced by Hub members has two aspects or sources. One was the discomfort or unsettledness inherent to transformative learning. In this case, it felt important to be aware of individuals’ experiences and to continue to hold the process steadily, understanding that the experience of discomfort was integral to the learning. The other sense of discomfort, often connected to the word ‘chaos’ seems to imply that contextual factors may contribute unnecessarily to learners’ discomfort, and that we needed to act on them. As a host team, we needed to discern the nature of the discomfort we sensed in order to respond effectively. We discuss this further below in our consideration of sufficient stability.

Flexible structures

As mentioned, we aimed to find the minimal structure that allowed people to self-organize in meaningful ways. Working with a minimal structure in a way that was responsive to learners’ needs meant shifting along a spectrum from more structured design to less structured design in response to the hubs’ development and the participants’ needs. We often responded to these perceived needs through the session design. Consider the following from the launch day debrief.

Need to continue to have a very clear organization/structure to handle the large number of participants:

This occurred at a time when the group was at its largest and the collective could feel chaotic. The need for clarity of process
seemed paramount. Later in the process, we were able to see how this need shifted.

One of the ways in which this structure changed as the needs of the community did was in developing structures that could flex to meet different and sometimes diverging needs. At times, this meant offering different options simultaneously, such as journaling, small group dialogue and larger group process. After one such session, Hub members commented:

We are respecting each other deeply by diverging. It’s counter-intuitive but diverging brings us more a sense of a collective.

Having different options meant I could attend to my own needs but not disconnect; can be true to myself and still engage (like, not choosing to go off for a coffee even though that would have been an option).

One member described this kind of structure as offering the opportunity to be “alone together”.

Closely related to the question of structure was the issue of framing. How much framing was needed before moving into process was a near-constant question in the debriefs. Sometimes the answer was unclear.

Do people need more framing in terms of u.lab being a process that is all about not jumping into action right away, but taking the time to observe and reflect?

How much framing do we need to give? I mean we could go in every single explanation and give tons of framing. We also need to let people have their experience, and learn at their pace and discover where they are as they go. What kind and quantity of framing is needed for what things?

Often, the feedback from Hub members was that new processes needed more framing rather than less and, over time, our approach to framing key processes evolved. The most concrete manifestation of this was the way in which we set up the Coaching
Circles. In the early years, we described the process briefly and provided a written handout for groups to follow. This evolved to a lengthier description with examples the following year. Most recently, we dedicated a significant part of the session where Coaching Circles were introduced to frame them and included a ‘fishbowl’ demonstration of the process which allowed the community to watch a condensed version of the process in action. We commented:

After the Fishbowl, it felt smoother in circles. Great questions and comments came after it – they ‘got it’.

Having found the demonstration of the Coaching Circles to be so effective, we repeated the process when preparing the group to move into another key exercise, 3D Mapping. We learned that when inviting people into learning modalities that differ significantly from traditional higher education settings, dedicating sufficient time to the framing of processes, including a demonstration, helped to foster greater capacity in the groups for engaging in those modalities. The result was that the groups were more autonomous and found the processes more effective and satisfying.

For processes that were less complex, we found they didn’t need as much time for framing. However, the quality of the framing was brought to our attention. We began to sense that greater ‘focus’ was important and that this was particularly true when the structure of the process itself was quite open. This became clear to us early on when we experimented with ‘seed ing’ an open space dialogue by asking Hub members to journal about the kind of conversation they would like to have before sharing these ideas in the group. After this experience we observed:

Someone commented that the open space was focused, and that this was helpful. This highlights a nuance: tight focus helps to strengthen the container. That is different than tight structure.

Thus, a key aspect of holding emergent space is to be able to
adapt the structure and framing of the learning experience along a spectrum from minimal to significant. Finding the right place on the spectrum is determined by a. the complexity of the learning process or exercise and b. the stage of development or the state of the learning community. As the learning community grows and matures, it is able to manage greater autonomy and needs less structure. Framing key processes well at the outset helps to foster this autonomy.

Sufficient Stability

In one year (2017), participants seemed to experience more significant discomfort than in the others. Not only did the faculty Hub Host need to step away from the process for several weeks, but the Hub did not have a permanent home. We used five different spaces over 10 weeks. While this could be an interesting feature of the experience, and was for some, for many the change of space was unsettling. This highlighted the impact of the physical space on the experience, perhaps particularly in an emergent learning environment.

Role of physical space - noise, crowded, need chairs without arms

Impressive the significance of the space. The kind of space. Today, in the Centre for Teaching and Learning, it was great.

Changing spaces was not in service, took a lot of energy. Especially the fact that it was sometimes unexpected (final debrief).

Working with different physical space became part of our work as hosts, and changes in space was something for which we felt we needed to compensate at times. What this surfaced was the need for stability felt amongst the group.

When the stability could not be provided through a consistent physical setting, we needed to counterbalance the disruption by consciously using the structure and design as an intervention.
Rhythm and ritual provided the counterbalance. Each session was held within a consistent framework that included a whole-community opening and some form of check in, a lengthier engagement including either coaching circles or a live session, and a whole-community closure. Having a consistent framework and sense of ritual for our sessions played an important role in holding the community.

A strong container meets the stability need (place and/or process and/or holders of space); in our case, there seems to be an indication that consistent process holds the group. Although some coaching circles ‘worked’ and others didn’t, and participation was variable, the hub “held”; as a Hub member commented, the need for consistency was met through consistent process. Despite all the other changes, it is arguable that the consistent overall process (circle, silence, some sort of check in, live session or coaching circles, closure) met people’s stability needs.

Arguably, when the process is emergent and the nature of the learning itself (i.e. transformative) can be a source of discomfort, there needs to be enough consistency and stability for the discomfort not to become overwhelming. The term we chose to describe this – sufficient stability – evokes another term, one drawn from Winnicott’s work described earlier. Winnicott (2012) introduced the idea of the “good enough” environment (also called the good enough mother) to describe a context that meets the necessary conditions for fostering growth. In educational spaces, the necessary stability conditions can be met through the ritual and rhythm of the learning process.

Quality of Attention

In the second year of the Hub, an interesting experience occurred about a third of the way the u.lab process that surfaced additional insight about structure. As mentioned above, one of the processes used in u.lab is the Coaching Circle, a structured
group process that guides a group of 5-6 people through a careful consideration of the ‘case’ of one of its members. Each aspect of the process is allocated a certain amount of time, and one member is assigned to be the time-keeper and move the group through the process. Year after year, participants describe this as one of the most powerful aspects of their u.lab experience.

In one session early in our Hub hosting experience, we asked case-givers to share a comment about their experience in the coaching circles. Feedback was highly positive. One case-giver, in particular, stated that the way the process was held was something she experienced as extremely supportive and opened the space for her to engage in in-depth exploration of her challenge. Following the session, another case-giver approached us for a private conversation and shared that the way in which the time was kept in her group, and therefore the space was held, was experienced as disrupting the process and blocking the opportunity for generative dialogue. Group members left the session frustrated and needed to revisit the experience together before they could move on to another coaching circle the following week. The juxtaposition of these two experiences was particularly striking, given that each group was following an identical and highly structured process.

We’re seeing more and more how structure plays an important role, in containing and shaping the space and keeping the coaching circles in focus only if there is a certain quality in the way the structure is upheld: with care and with the full intention to serve the person.

This experience drew attention to the way in which structure holds the potential to create a sense of safety, but also to take that sense of safety away. Of equal importance to the structure itself is the way in which it is held. In the example above, this meant being attuned to the experience of the case-giver and moving through the process in a way that kept the individual and the case at the centre of the group’s attention.

Another way that the quality of attention surfaced as significant was on the occasions when a hub member voiced a critique
or questioning of some aspect of the process. While expressions of discord did not arise often, when they did they were highly visible. Flexible structures, such as open space, allowed the dissonance to be voiced and given a space to be explored with all who resonated.

The space is open to testing, experimenting, questioning, people saying “I’m not feeling comfortable with this or that”

Today gave students who wanted to “vent” a good working space.

Having structures built into the process that provided space for dissonance was important. In addition, the space needed to be held such that it was made clear dissonance was welcome. To the extent that we achieved this, it was by responding to questions and critiques by opening to them and making space for further inquiry and exploration, usually by suggesting or supporting small group dialogues for all those interested in the topic. Where it felt relevant (e.g. critiques about the hub itself), we would join those conversations as Hub Hosts.

Revisiting 4.0 Education

We began this article describing the Concordia U.lab Social Innovation Hub as an opportunity to ‘explore through doing’ the principles and properties of 4.0 Education. Scharmer (2017), in his Matrix of Educational Evolution, outlines five dimensions of education: learner, educator, relationship, organization and governance. Here, we use these dimensions to reflect on the nature of the space that we were holding and co-creating in community.

Once again, we draw from records of our weekly debriefs, particularly responses to the debrief question, “What is being developed?”, in an effort to deepen our understanding of this emergent and emerging learning space.
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Learners

“Holistic” is possibly the most common description people use when reflecting on the nature of learning in the hub and what it means to be a learner. As mentioned above, while many hub members express an appreciation for the conceptual frameworks, it is the learning that touches social, emotional and intuitive aspects of self that surfaces as most notable:

This is a proof of concept that it’s possible to bring the whole self to an educational space. There is the idea that if people are allowed to bring their whole self it’s gonna derail into therapy, but here we see how bringing the whole self does not hamper the group.

A class where healing can happen.

A place where intuition and listening are allowed to be used

Our debrief was very emotional, and the fact we were there and holding was important, this is school but there is room for emotions, and for vulnerability.

Learning this way to me feels completely natural. Feels like what we are doing is really just learning like humans.

Having brought themselves as a whole to the learning experience, participants are now faced with two major learning tasks: one, they have to carve their own learning path, and two, they are asked to constantly reflect on what they are experiencing. The emphasis on discovering your own learning journey is highlighted in comments such as:

We got in groups to explore those themes because we were genuinely interested in those topics and in talking about it. We usually do that with friends. Here we are doing it with class.

It is about the process, not the grade, and therefore it becomes much more creative, there is no one direct place to go, the same words can resonate in different ways, and
put together out in the world in different ways, when you are in regular learning settings it’s more one way. But here people take it where they need to.

Some people adapted the empathy walk, owning the experience.

Reflection was seen as an integral part of the learning process:

A different way of asking questions, different kinds of questions can be asked, about: impact, change, process and self. You usually don’t inquire about yourself.

A space to foster inquiry.

Thinking at a different level: what the learning I’m doing in this class means to me personally, and the implications it has for the world

The final comment, in particular, reflects Scharmer’s (2017) matrix description of the learner as co-sensing and co-shaping the future.

Educator

All members of the community, including the Hub Hosts, entered into the process as learners. Hosts participated in Coaching Circles and other processes and committed to engaging in the work of deepening awareness of our own quality of attention. The resulting learner-educator relationship is profoundly different from a more traditional university learning experience and it enabled a much more distributed power structure. One outcome of the process is a more level relationship between ‘students’ and ‘teacher’.

This is a place where students can give.

This is decentralized, people break up in their coaching groups, and then come back.

This is relational learning, here I can hug my profes-
sor! Yes, you can hug because here you are in a real relationship.

You can be more vulnerable, and open, and speak and it’s okay not to have the answer, you are not given right/wrong judgments, you are not quieted by the prof.

As implied in the previous section, the primary role of the ‘educator’ was to cultivate a generative social field that would then source the learning. Engaging in the dual role of guide and co-learner shifted the power dynamic from a more hierarchical model to a more collaborative one and enabled the formation of a learner-educator relationship that contributed to this cultivation.

Relationship

The primary aim in forming the Hub was to create a learning community in which we could move through the u.lab process together. The very nature of the learning described in the debrief reflections above is that the learning that takes place in a u.lab hub is relational learning. The capacities described cannot be learned in isolation; they must be learned in the context of the relationship. However, the importance of these relationships goes beyond that of a learning mechanism. The connections established through the Hub are in themselves a defining aspect of this experience and one of the ways it generates value for participants. As one student put it, “we are learning about community by being community.”

The first feature that stands out in the Hub community is an organic quality of coming together. People seem to experience a certain freedom and spontaneity in how they decide to show up and how they relate to one another.

In our debriefing group there was time for everybody to speak, in a natural way. We were a group of 6, and we started by asking if we sensed that we are together… We sensed yes - it felt organic and meaningful, and we said yes.
The informality, cozy, caring of the space is helpful. It felt natural.

A second feature is a feeling of intimacy or connectedness characterizing social exchanges in the hub. Rather than experiencing a formal or sterile learning environment, the debriefing comments describe interactions that are warm and personal:

[There is] intimacy even if the group is very large.
A strong sense of relational support and emotional coherence within the hub.
[There is] something about the familiarity. There is something safe about being all together. Presencing is kind of fragile, and by being together there is a certain safety. Indeed, I was very grateful that I didn’t have to do this alone.

It’s action oriented, puts more emphasis on the heart rather on the head, and it offers different measures of success, other than just hard cold measures, and it puts a lot of emphasis on collaboration.

A third feature that stands out, possibly connected to the sense of freedom just described, is a certain self-hosting capacity. On multiple occasions participants and hosts remark that the hub is organizing itself. Over time, there is a sense that the Hub, as a collective entity, is more autonomous and less in need of input from the hosts.

Some people are naturally stepping up taking responsibility, for example [making sure] that everybody had a partner for the empathy walk.

There is some great self-organizing. But that also meant that people went over time. The self-organizing overrides the time [keeping].

Support and peer coaching group is something we came to value, so much so that at some point we did a coaching circle instead of a live session.
The Hub Host team continued to hold the space, organize, coordinate and facilitate throughout, and this was essential for maintaining a strong container. That said, Hub members increasingly took responsibility for their own well-being and learning path as well as the well-being of the community.

Organization

Scharmer describes the organizational principle around which 4.0 Education is built to be that of the ecosystem. The dynamic movement of the ecosystem is described as a process of breathing in and breathing out, “where action learners and action researchers move out into the real world and engage in the front-lines of societal change (“breathing out”); and change-makers from across sectors and systems regularly bring their experiences on campus in order to share, reflect, co-sense, and co-create new ways of operating (“breathing in”)” (Scharmer, 2019). The learning process of u.lab guided learners to into their immediate contexts in between weekly gatherings to observe, listen, inquire, sense and act. Further, the inclusion of community members in a university-based hub meant that the breathing in process was constantly in play in the Hub. Community members brought into the room the current challenges we are facing in the local community, and in the world.

This repeatedly surfaced as a key aspect of the experience, often seen in the description of the learning in the Hub as “real”.

It is a porous learning space, this is something that has implications for learning space. This space is multigenerational, open, anybody can come into it.

There is a feedback from the real world that is present through the co-presence of students and community, that creates a feedback mechanism that brings the real world into the room, without even having to go out there, the real world is right in here, we are part of it, the level of diversity in the room such that make the experience more relevant in terms of real world experience.
Learners expressed a sense of learning in service of something greater than themselves.

[We are] tackling the real world. Higher education traditionally does not prepare us for the real world, the teacher is telling you their version of what the real world is and what to do with it. But here there is the flexibility to get in tune with the real thing, and discover what I want to do about it.

We are thinking at a different level: what the learning I’m doing in this class means to me personally and the implications it has for the world.

Hub members brought an awareness of, and experience in, the local community ecosystem into the Hub learning space. Throughout the process, the question of action and impact in the community and in the world, including taking initial action steps to effect this action, was central to the process. These aspects of the Hub made manifest the ‘breathing in and breathing out’ quality that characterizes 4.0 Education.

Governance

Scharmer describes the governance structure of 4.0 Education as “innovation ecosystem: shared awareness of the whole”. The Concordia U.lab Hub was set within the traditional governance structure of the university, with its tendency to operate on a more compartmentalized understanding of the system. That said, it is interesting to note that one prominent features in participants’ description of the Hub experience is a sense of connectedness that goes beyond the immediate relationships and the Hub itself.

I felt a sense of a bigger field. I felt the presence in the room more than I had before. The opening story about stakeholder interviews was powerful and generative. There were great feedback given - a good mix, students
and community members, people at different stages - it was great to get the feedback. And then, for the social field, the power of standing with that many people in the room, all standing. I was sensing emergence, the power of collective intention. There is a community across time, intertemporal, a community that is inter-cohort, in the sense that for some people it’s the first time, for others the second, for others the third. There is a sense of continuity and stability. Something shareable. A generative social field gathering.

While people’s actions remain local and often individual, they are set within an awareness of a broader context of which they are a part.

Cultivating a Social Field for 4.0 Education

In 4.0 Education, learning happens from the field. Operating from this perspective means that the social field is at the centre of the educational endeavour and the focal point of attention for those who hold and guide educational spaces. What happens in the field – or whole – matters. From a social field perspective, whole persons learn in action and through relationship in the context of a larger whole or community (see also Recap of DoTS 2, 2019).

The social field perspective pays particular attention to the source conditions that give rise to different qualities of relating which in turn give rise to practical results (Scharmer, 2016). The source conditions of these relationships are shaped in part by the inner place from which individuals in the system operate and in part by the quality of the container (Scharmer, Pomeroy & Kaufer, p.3). It is in attending to the quality of the container that a new role emerges for those who hold educational spaces.

The social field, once born, can be thought of as a living entity. To become a generative source of learning, it needs to be consciously attended to, held and nurtured. While our inquiry process revealed several aspects of holding space that helped us
to create the conditions for a generative social field, one of the core operating principles embodied throughout this experience was never fully articulated until we began to engage in the reflection process for this article. This is the principle of remaining intentionally and consistently in contact with the evolving collective. Throughout the debrief process, our focus was on seeing and sensing what was happening in the collective and what needed to happen in response in order to support and deepen the learning process. In this sense, our focus of inquiry was at the level of the social field, as was the focus for intervention.

Our ability to remain connected and responsive to the social field was enhanced by integrating a formal process into the work for this purpose. This process was the post-session debrief and planning sessions. These sessions served to heighten our awareness of the evolving social field in two ways. First, the reflection question, “What is our sense of our collective place in this journey,” brought our attention to the collective experience and did so in a space where there was time, a structure, and a shared intention to engage in reflection. Second, different members of the community joined the debriefs, providing a variety of voices from, and perspectives on, the collective experience so that we could see the whole from a microcosm of itself.

To help frame our understanding of the importance of remaining in contact with the whole while holding space for it, we find it useful to introduce a concept from Open Systems Theory (OST). A foundational concept in OST is that of directive correlation (Emery, 2000). Open Systems Theory views any given system as existing in a constant, bidirectional exchange with its environment. When a system acts on its environment, that action is called planning. The environment acts upon the system and becomes known to it through learning (Emery, 2000, p. 624). The relationship between the changing system and the changing environment can take different shapes depending on whether the two share their starting conditions and their direction of change. When a given system and its environment change in the same direction, driven by the same goal, it is more likely that an adaptive relationship develops between the two (see Figure 5).
To achieve such a relationship requires a conscious effort and structures to ensure that the system is in direct contact with its environment as each changes and evolves. For our purpose, the Hub-Host team can be thought of as a (design) system and the Hub the environment for which planning is undertaken. The Hub debrief process, and the fact that it included Hub members in addition to the hosting team, enabled this type of directive correlation.

An important aspect of the debrief process was that it included, but also moved beyond, evaluative reflection. What worked and what was not in service in a session were important factors to consider, but they were not sufficient for connecting with the social field in a way that enabled us to see and sense the field as it emerged and evolved. The questions, “What is our sense of our collective place in this journey” and “What questions are we holding?” helped us to move from seeing/evaluating to engaging on a felt level and accessing a deeper level of knowing and inquiry about the experience. Introducing journaling into the process supported the deepening of the inquiry. The question, “What is being developed here?” helped us to locate our immediate experience with our own emerging sense of a broader collective inten-
tion. Engaging in session design from a place of connection to the social field helped us to design our sessions in synchrony with the evolving whole.

Giesenbauer & Mueller-Christ (2020) describe education institutions in the 4.0 paradigm as being defined by “a focus on self-management, a strive for wholeness, as well as an awareness of their evolutionary purpose, taking responsibility and trying to actively participate in societal change” (p. 11). We see reflected in our weekly sensing debriefs several key aspects in this description. What is less reflected in the debriefing comments is the intention to contribute to the evolution of higher education in service of societal change. While that intention was held by the Hub Host Team, it may not have been foreground for all Hub members.

Conclusion

As a living entity, the social field needs to be nurtured and cultivated on an on-going basis. This is particularly true of a 4.0 Education experiment which considers the social field to be the primary source of learning. In our effort to cultivate a generative social field at the Concordia U.lab Social Innovation Hub we focused our attention on the quality of the holding space. Course content, session structure and the strong relational aspect of the learning all surfaced as significant factors shaping the quality of holding space and learner experience. As hub hosts, we found our ‘holding’ attention was often drawn to the design of sessions that were responsive to the evolution of the social field. To do this, we needed to be able to know the field as it evolved and to remain in close, conscious contact with its evolution.

One unexpected insight that surfaced in this regard was the significant role the weekly debriefs played in creating the conditions for a generative social field. We have come to realize that bringing a consistent, intentional inquiry process enhances our ability to attend to the whole and to design from a sense of connection to it. Initially, the decision to hold weekly debriefs was instinctual and unstructured. Over time, we became more con-
scious of the role of these debriefs in holding the space and cultivating the social field, and we became increasingly intentional in our questioning and our process. The debriefs themselves became our primary means for sensing into the whole. It was the structured interplay between sensing into the whole and then planning and embodying action from that place that became essential in the holding of an emergent learning space. Somewhat paradoxically, it was the consistent and structured sensing and reflection process that allowed us to hold the space with fluidity and responsiveness. As the social field evolved, we were able to design and plan in direct correlation with it. This form of planning helped us create a flexible container that mirrored and supported the learning and growth needs of the community as they came into reality. In this way, the social field becomes the key source of learning, rather than curriculum or content.

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