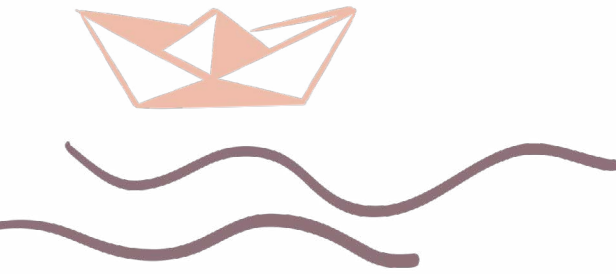




HARNESSING THE SWARM

How to prepare, design and hold space for emerging and transformative collective action



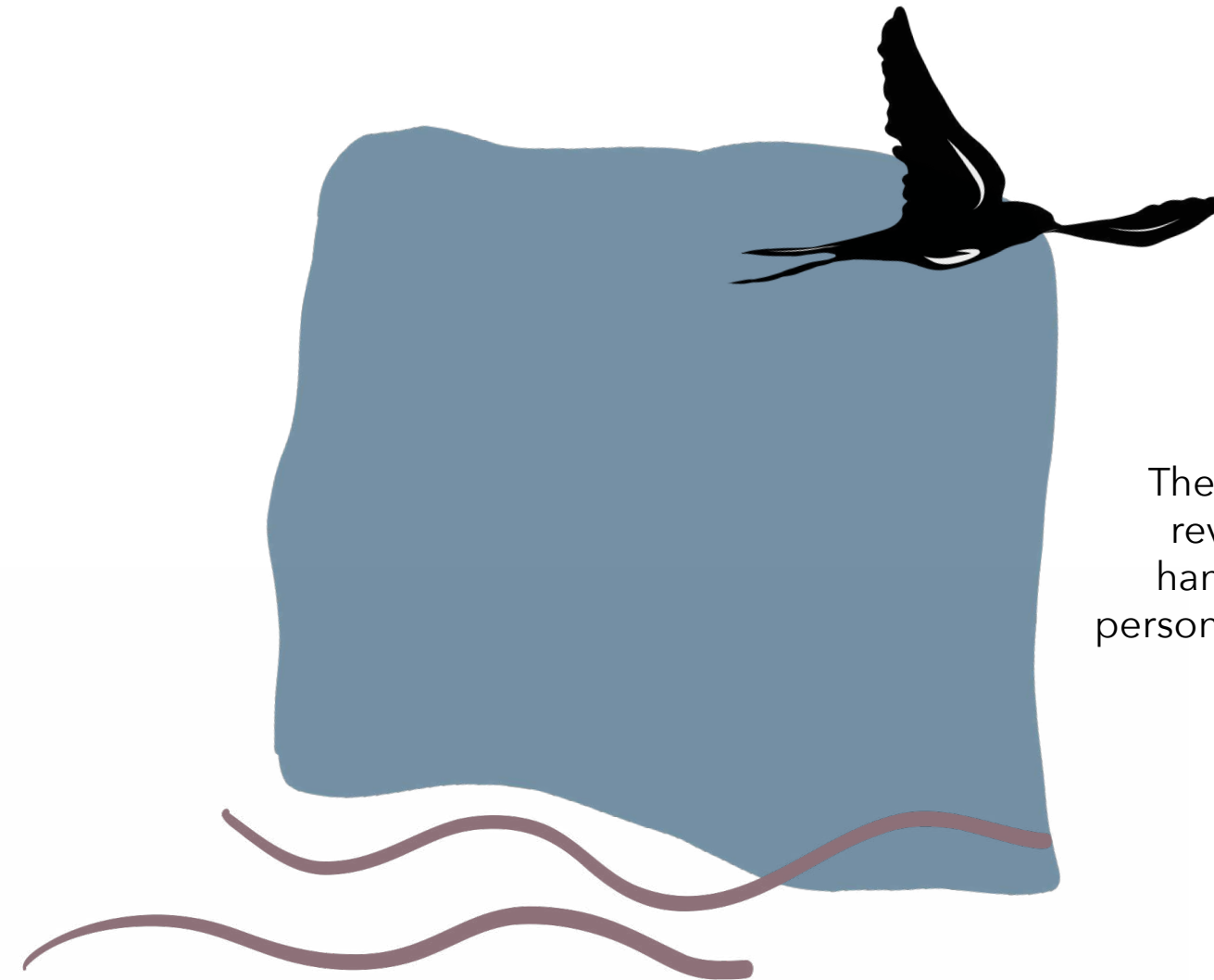
CONTENTS

THE CRISIS	6
THE QUESTION	8
GLOBAL ACTIVATION OF INTENTION & ACTION	10
OUR PROPOSITION	12
DESIGN FOR A SWARM	14
HOLDING SPACE FOR A SWARM - INNER WORK	18
HOLDING SPACE FOR A SWARM - OUTER WORK	24
APPENDIX	48

Impressum

While many people are inspired and motivated to work towards deep societal transformation, there is no easy recipe for catalysing and holding space for such a collective movement. In the dramatic year of 2020 that was defined by the beginning of the Corona crisis, Nova Helvetia emerged as a successful experimental process to do just that, employing many old and new social technologies that are readily available, woven together with some of the learnings and insights from collaboratio helvetica's previous work with dialogue, social innovation labs and other collective processes.

We think that it is crucial to share this journey with a wider audience.



The only way out is spiritual, intellectual, and emotional revolution in which, finally, we learn to experience first hand the interloping connections between person and person, organism and organism, action and consequence.

Gregory Bateson



THE CRISIS

In March 2020, as the new virus swept through the planet, our society was forced to face an unprecedented disruption. Suddenly, systems we had built our lives on came to the brink of collapse, requiring urgent and immediate action on multiple levels. While these actions were essential to address the symptoms of the crisis in order to avoid chaos, death and social breakdown, it was also clear that the work facing us collectively cannot stop there. Another process, one of deep inquiry and reflection was needed, and also made possible, as the breakdown of everyday life nudged many people to dedicate time and resources towards understanding the root causes more fully, to become collectively more aware of the interdependencies and entanglements of our world, in order to find new avenues towards different futures.



THE QUESTION

The inhuman and unsustainable logic of market capitalism is well documented and is now part of general public discourse. And yet, until March 2020, it seemed all but impossible to even slightly alter the way we work, live and consume. Who would have thought that the red tapes put down by economists, politicians, business executives, financiers and the generally powerful can be lifted so fast, when the reality of a health crisis, with a looming economic depression and the potential of global political upheaval in its footsteps, became tangible. It was extraordinary to witness how quickly the seemingly unchangeable structures that underlie our world can turn out to be foundations of a sandcastle that gets washed away by an unexpected wave of the ocean. We asked ourselves: What could the future look like, now that we witnessed that it can be radically different from the present?



GAIA: GLOBAL ACTIVATION OF INTENTION AND ACTION

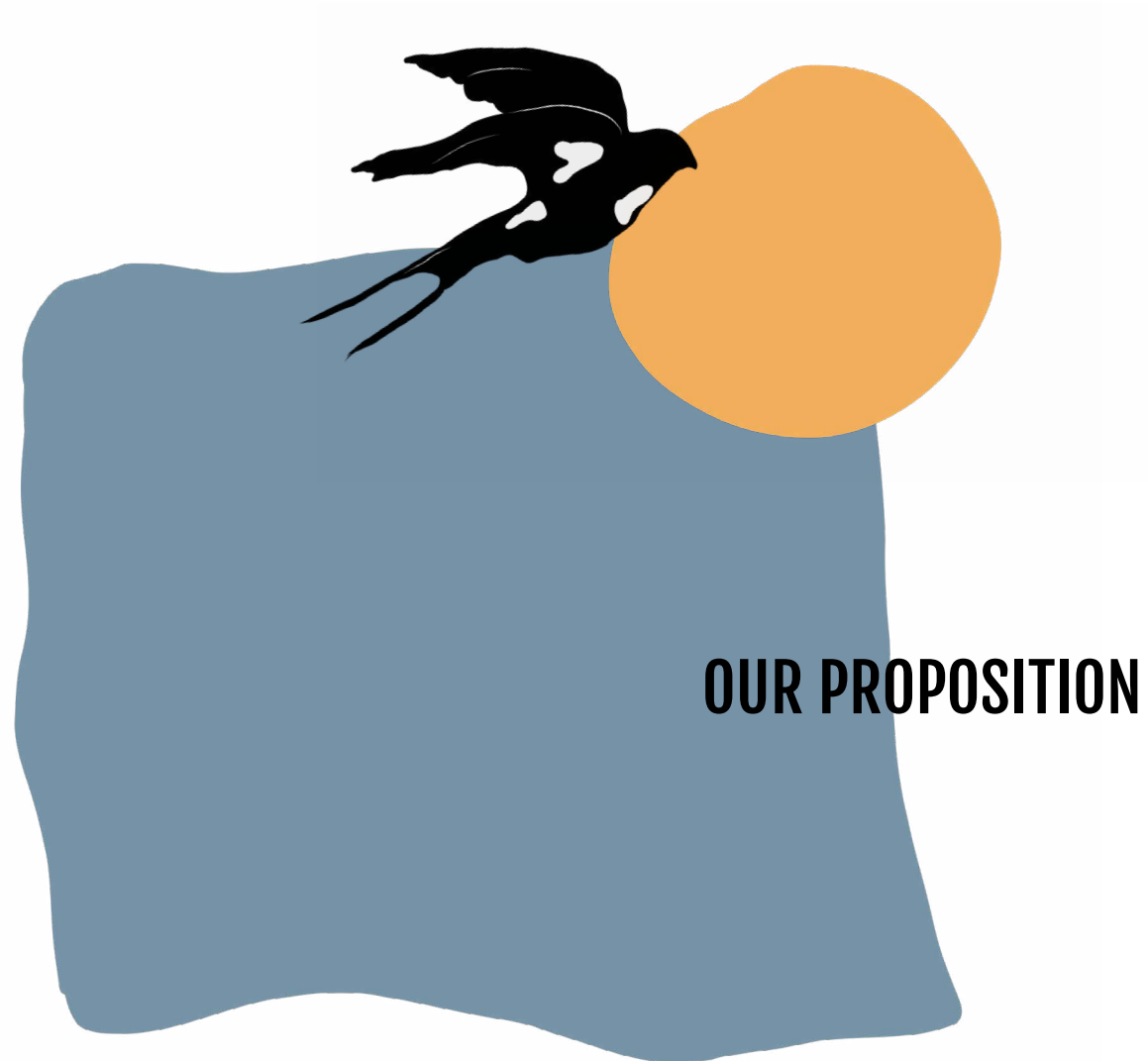
As a response to the unfolding crisis, and building upon their work of 15 years, the Presencing Institute launched a global call to participate in GAIA (Global Activation of Intention and Action): a journey based on the Theory U process - a well-known method for collective learning and management for awareness-based systems change, developed by Otto Scharmer and his team. Instead of simply guiding a truly global group of thousands of participants through the standard U journey, the proposition had an additional twist: between the global calls, which were called inhales, participants were invited to activate their local community (often on the national level) and hold space for a more locally focused journey through the U process. These were called exhales.

"The time to pause, to sense, to connect, and to act together is now. Because no one can do this alone. By activating our capacity for deep listening, we support each other, co-sense what is actually going on in current reality and what is wanting to be born. GAIA can help us function as a collective organ of perception - a shared perceptive capacity we create together."³

¹ <https://www.presencing.org/>

² There is a brief summary of each tool mentioned in this Guidebook at the end, under the chapter called Tools.

³ <https://www.presencing.org/gaia>



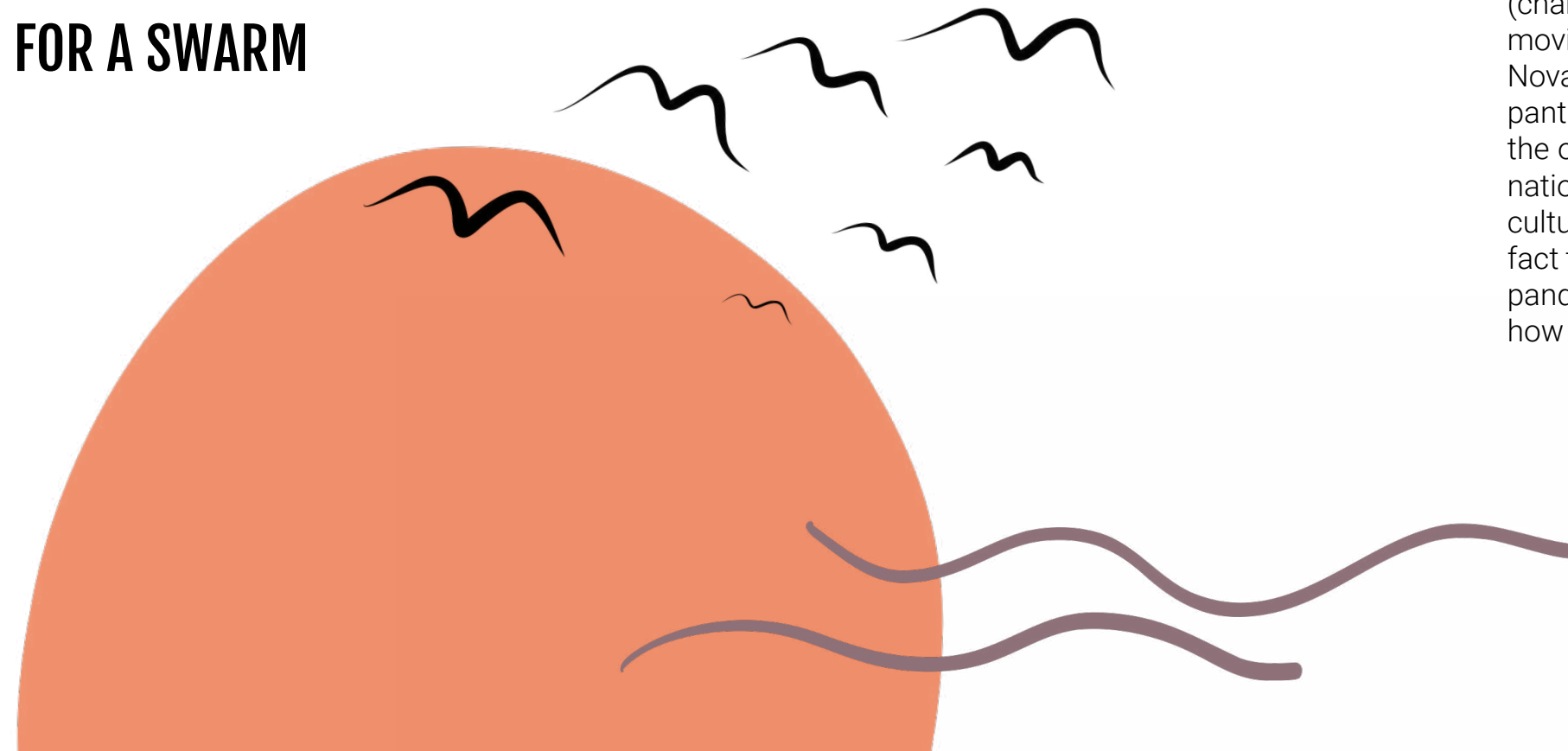
Inspired by the GAIA call, collaboratio helvetica launched a collective journey of sensing, learning and creating, by inviting motivated individuals, groups and communities in Switzerland to come together, to make sense of the crisis, to identify and comprehend its root causes, and to share reflections and possible solutions that address them. It was a moment of inspiration, connection, and communality. People were driven by generosity, curiosity and a search for belonging. The swarm was forming in Switzerland, and it took the shape of the Nova Helvetia journey.

The GAIA inhale (global) and exhale (local) events aimed to launch a process of civilizational renewal, in order to:

- re-imagine how we want to live and work together
- re-invent our economies towards serving the wellbeing of all
- evolve our democracies in ways that make them more direct and dialogic,
- And, re-shape our learning systems in ways that integrate head, heart, and hand.⁴

⁴<https://www.presencing.org/gaia/2>

DESIGN FOR A SWARM



*“Look closely at the present you are constructing:
it should look like the future you are dreaming.”*
— Alice Walker

While the Presencing Institute provided the theoretical framework for the modules, building on our own experiences we designed a unique and robust process for collective learning and action: the Nova Helvetia Journey. In the spirit of Theory U, *collaboratio helvetica* creates learning spaces that weave inner work (changing oneself: a personal intellectual, emotional, and experiential evolution) and outer work (changing the environment: taking agency, participating and moving into action) into a rich tapestry of experiences. The Nova Helvetia format was one of them. Beyond the participants’ personal journey, however, laid the foundation held by the organisation - not only existing infrastructure for coordination, facilitation, communication, and learning, but also the culture of how we work, and how we work together, even the fact that we swiftly launched the project in the unfolding of a pandemic, when most organisations were still trying to see how they could operate in the confinement.

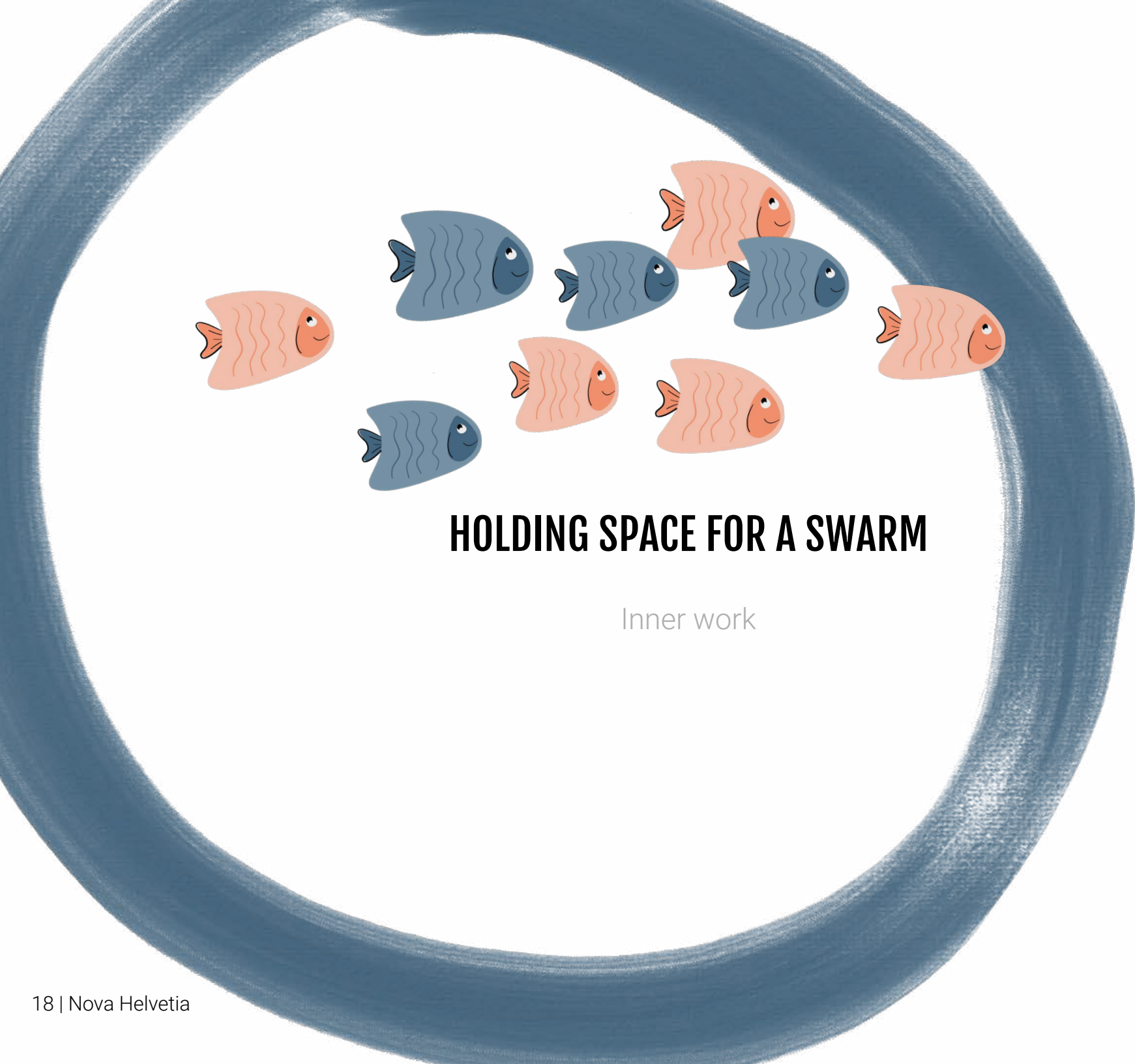


INNER WORK

- **Presence:** several people from collaboratio helvetica signed up for GAIA independently, so when it was suggested that we do the Swiss exhales, it was suddenly obvious that this is what we should do.
- **Preparation:** collaboratio helvetica made several key internal decisions about how the organisation would respond to the crisis, most importantly, deciding to remain active instead of shutting down. We also kept everyone on the same salary, although we were running out of money.
- **Personal responsibility:** a few people within the organisation quickly decided to move into action and drive the project forward, despite the financial unclarity and the
- **Sensing, presencing, reflection:** as part of the U process, both the organisation's members and our participants embarked individually and collectively on a deep inner process that allowed us to broaden our perspective about the present, and gain new insights about the future.
- **Invitation:** Reconnecting with nature. Since the journey had to take place completely in virtual space, we decided to add to the process a regular personal reconnection with a piece of wild land.

OUTER WORK

- **Modules:** exhale events based on the Theory U framework
- **Mobilisation:** connecting and activating a large group in Switzerland, based on our existing network and beyond (by opening our digital home to everyone); also mobilising financial resources
- **Working groups:** participants in the bi-weekly exhales were invited to explore topics and form dedicated working groups to focus their inquiry
- **Visibility:** our professional communications team created a bridge from the work of the participants to the wider public
- **Interweaving:** catalysing exchange and cross-fertilisation between people, groups and themes.
- **On the U journey:** stakeholder interviews, listening, explorations, research, crystallizing
- **Reflection papers:** each working group produced a Reflection Paper, summarising their research, analyses, insights and possible routes towards action
- **Swiss Forum:** a national event to share the work of the working groups, and celebrate the journey
- **Prototypes:** each working group developed a prototype proposal to explore concrete steps towards societal change
- **Cobudgeting:** a collaborative finance experiment
- **Learning:** we have been documenting our process, and you are reading the result



HOLDING SPACE FOR A SWARM

Inner work

Presence

Theory U is one of the most used processes in the toolbox of collaboratio helvetica. Many of us are personally connected to the global community around this method, and to its conceiver, Otto Scharmer and the Presencing Institute. This is why several people from collaboratio helvetica signed up for the global GAIA journey independently, so when it was suggested that we do the Swiss exhales, it was suddenly obvious that this is what we should do. Capacity problems (can we actually do this, in terms of time and money?) were mentioned and ignored. There are moments when you know you are measured - and this was our moment. We always thought that swiftly navigating complexity and stepping into leadership would be our way of responding to a crisis - and it turned out we were right.

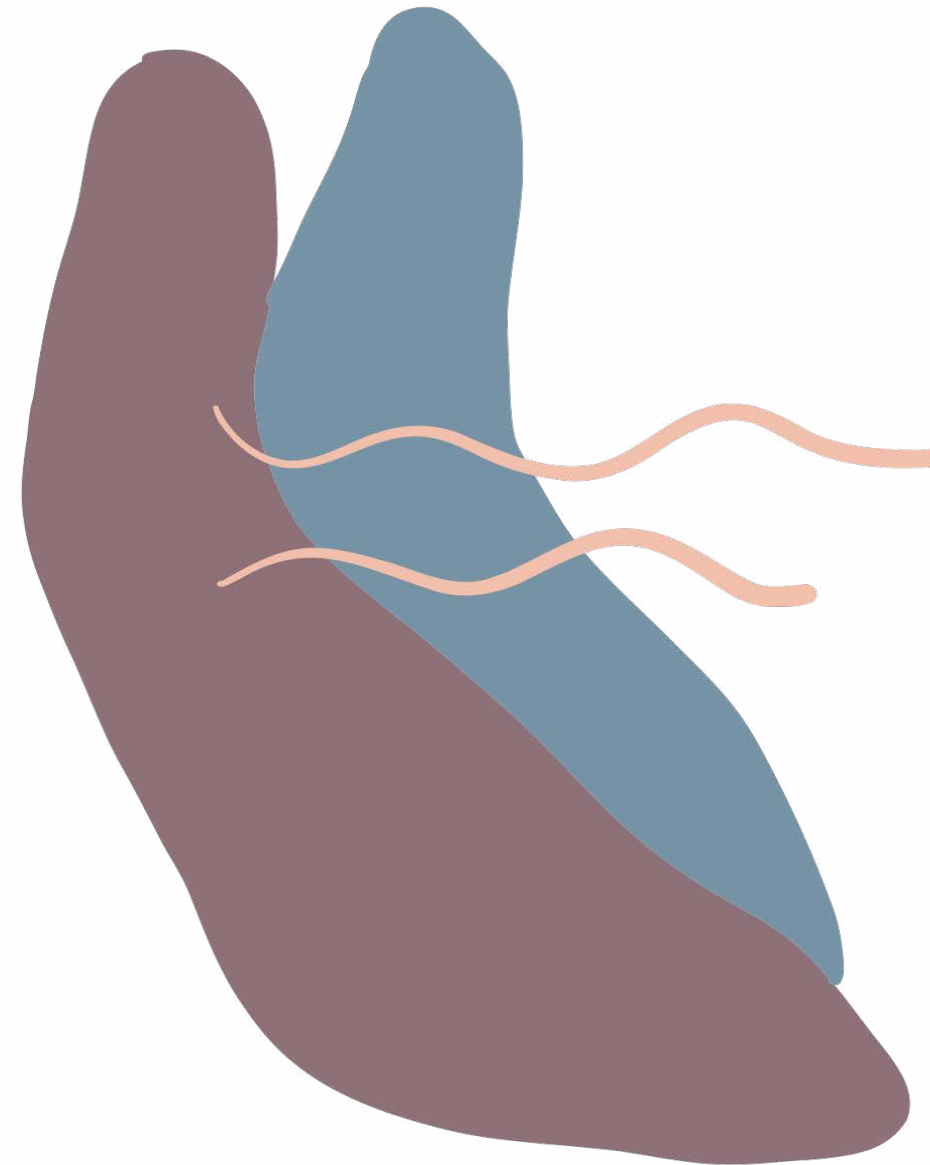
*"Managing the present to create a new direction of travel is more important than creating false expectations about how things could be in the future."
- Dave Snowden*

Internal preparations

As collaboratio helvetica the organisation prepared to hold space for the Nova Helvetia journey, we spent some time reflecting on the situation we found ourselves in, and came to a series of important decisions:

- to remain active instead of shutting down - we rode the wave rather than be buried by it
- to keep everyone's work time and salary intact, to create a sense of security
- To hold several internal team reflection spaces where we shared our individual insights and aligned our intentions
- To open up [our digital platform](#) to anyone (without paying a membership fee)
- To start a [series of reflections](#) on the crisis
- To host a weekly online community space for our members to gather and talk about their experiences of the lockdown.

Additionally the dialogue group offered weekly dialogue evenings - a deep space for sharing and listening, that provided perspective and solace in this newly found isolation.



Personal responsibility

While several team members decided to be part of the global GAIA, and strongly supported the Nova Helvetia concept, in the end it required two people to take the responsibility for launching and holding the project. Nora Wilhelm and Sarah Friederich formed a team, designing and facilitating the modules together, and sharing the rest of the work among themselves, occasionally involving other members of the team.

Originally the modules were held by Nora and Sarah, and later, as Nora became more involved in the international GAIA process, other facilitators stepped in. In the end it required just one person, Sarah, to dedicate their full attention to the Nova Helvetia project, everyone else was stepping in and out as needed. However, the entire organisation took part of the journey both as participants and also as supporters holding relevant pieces of responsibilities (communication, learning, finances).

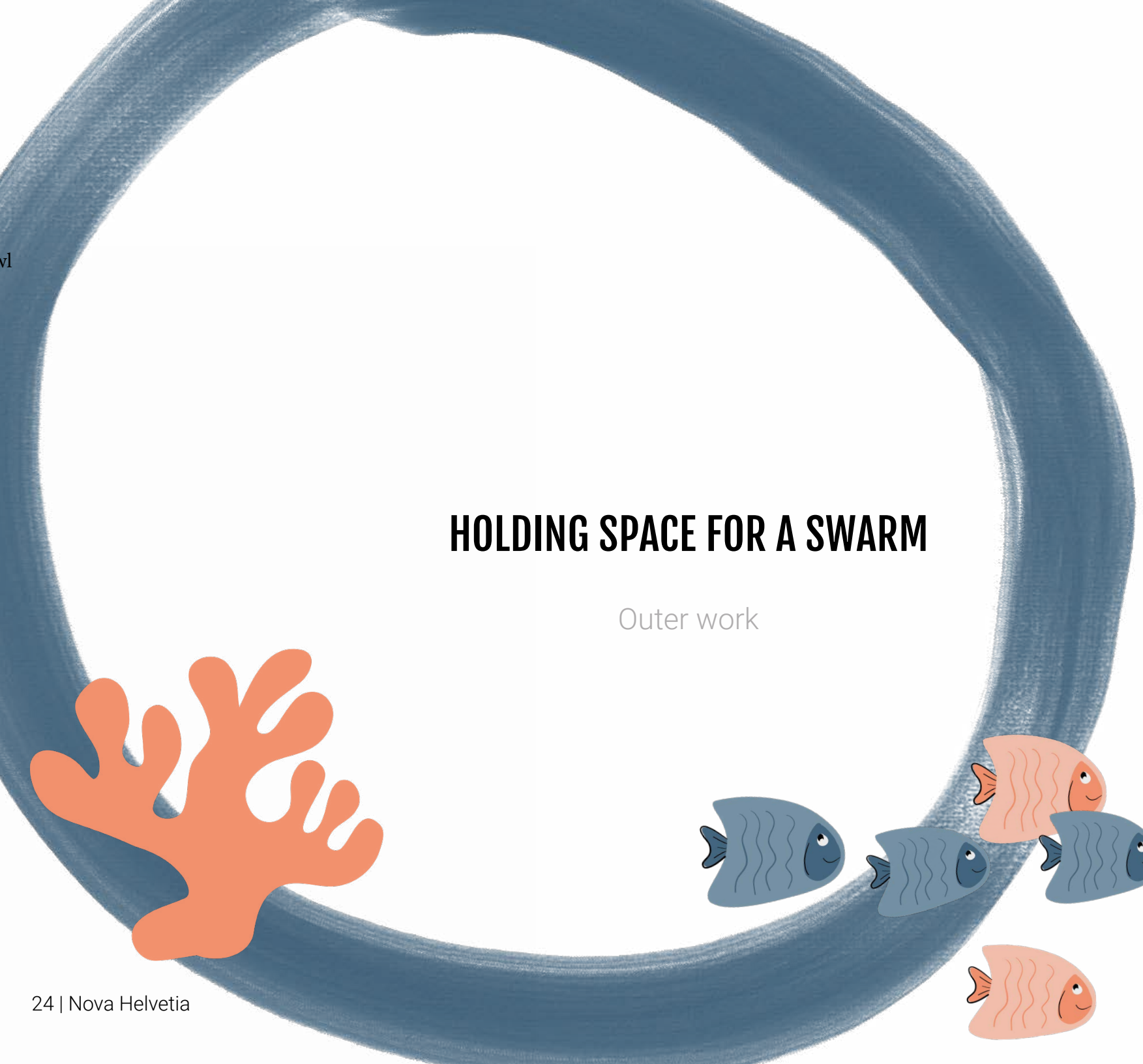
Sensing, presencing, reflection

Travelling down the left side of the U, a personal and collective learning journey takes place, in which all participants cross their intellectual, emotional and social boundaries in order to become aware of the interdependencies, contradictions, tensions and support mechanisms within the system that constitutes the world around us. It is a phenomenological approach to knowledge - we are invited to open our minds to other people's experiences and allow that experience to slowly transform our own perspective, to witness our understanding of the world shape-shifting into a radically different configuration. This process takes on both the personal and the collective level, because through the new relationships that are forged, a shared awareness of the environment emerges.

"As individuals, we must begin to pay attention to our attention (self-awareness); as teams, we must begin to converse about our conversations (dialogue); as enterprises, we must begin to organize our organizing (networks of networks: eco-systems); and as eco-systems, we must begin to coordinate our coordinating (systems of awareness-based collective action, or ABC)."
— C. Otto Scharmer, *Leading from the Emerging Future: From Ego-System to Eco-System Economies*

INVITATION: Reconnect with nature

- Every day during the GAIA journey, take some time to reconnect with a piece of wild land. It should be possible to find a place of wilderness, even if just a neglected lot between houses where wild things grow, within a walk of your house. It doesn't have to be big, it just has to be a small piece of earth where things grow by their own volition.
- It is a private affair. Go alone.
- Visit the place as often as possible. Notice the shape of the leaves, the clustering of the plants, the rocks, the bugs, the dust, the soil. Lean close enough to let the cacophony of smells take you out of the city for a moment. Notice what is happening, and to whom - what grows, what dies, who hangs out there, the birds, the worms, insects, the neighbourhood cat. Sit with your fears, of dirt, birds, bugs, microbes or the virus, and send them as bright-coloured offerings to the goddess. Listen to Gaia breathe under you.
- Let the place talk to you. Become its soul friend. Forget about the project you are dreaming up with the virtual hordes - slow your ears to the budding leaves of the nearby tree. Bend your thoughts to the bacteria that is busy composting the soil. Tune your eyes to the worm's view of the earth, and when it rains, the bird's view of the worm.
- Needless to say, don't take a thing. If anything, bring an apple, or a fallen leaf from another patch of land. Or water.
- Make it a 14-week long secret love affair, that you cannot share with anyone. Don't take a picture, don't send a message, do not have a conversation with anyone else while there. Just be present, as often as possible, and allow the forces, rhythms and dreams of the land weave themselves into your blood circuit. They will find their way to your thoughts all on their own.

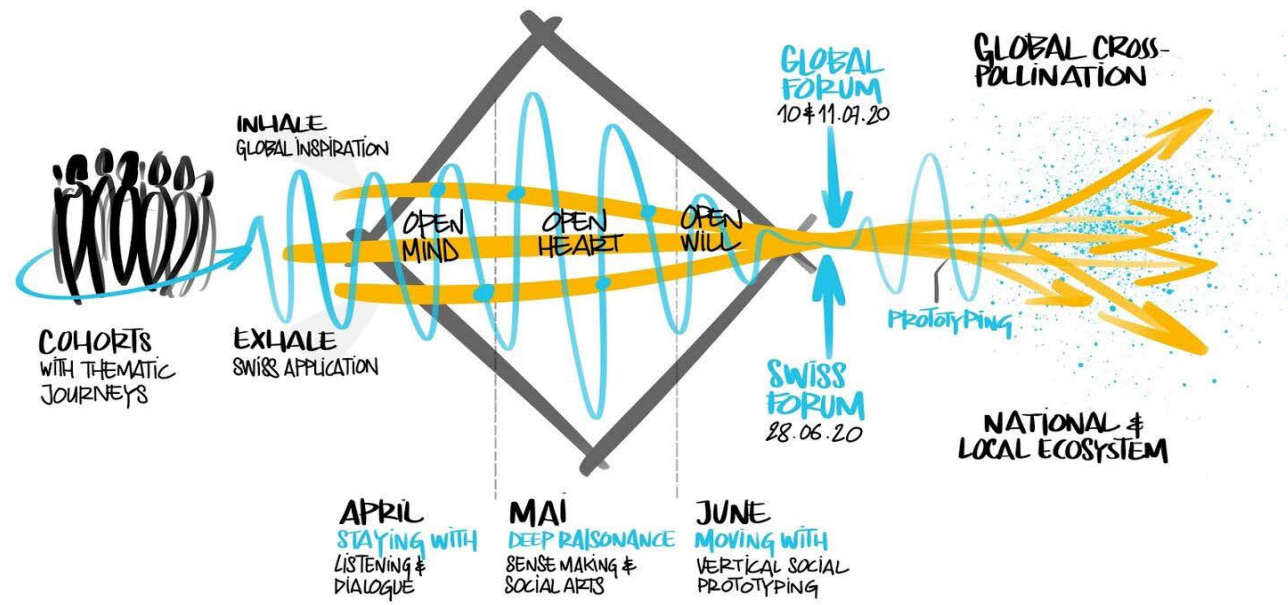


HOLDING SPACE FOR A SWARM

Outer work

NOVA HELVETIA AN EXPLORATIVE JOURNEY TO A HEALTHY POST COVID-19 SWITZERLAND

NOVA HELVETIA+
 DIE NEUE SCHWEIZ
 LA NOUVELLE SUISSE
 LA NUOVA SVIZZERA
 THE NEW SWITZERLAND

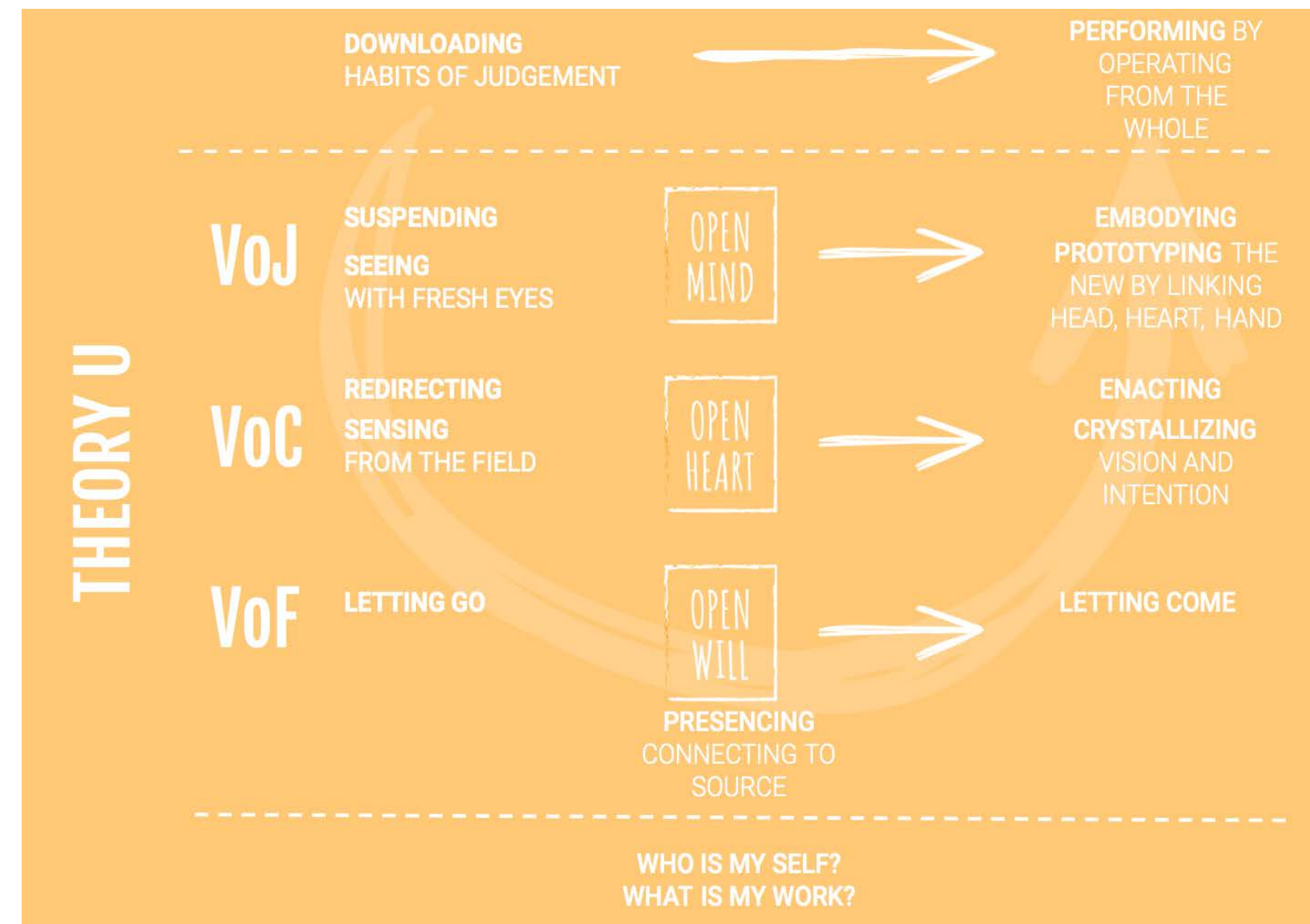


AN INITIATIVE BY
 Image by Jean-Baptiste Bonvalot | collaboratio HELVETICA

**Modules -
Exhale events in the Swiss context**

Program overview

The modules were aligned with the usual 7-step Theory U process. Collaboratio helvetica has several facilitators who are trained Theory U practitioners, which allowed us to launch Nova Helvetia without hesitation. It also helped that the global GAIA inhales were taking place, and provided inspiration and direction to the parallel journey of exhales.



**April 2020: staying with -
Listening & dialogue**

- **27.03.** Inhale 1: Co-initiation on the global level
- **03.04.** Swiss Exhale 1: Co-initiation, getting to know each other
- **10.04.** Inhale 2
- **17.04.** Swiss Exhale 2: Begin to explore in thematic groups
- Cohort gathering -> define a [calling question](#), see who has responded during the call to your invitation or theme, list other people you wish to invite, then after the call reach out to them. Clarify levels of involvement, roles and individual intentions and expectations
- **24.04.** Inhale 3

“As individuals, we must begin to pay attention to our attention (self-awareness); as teams, we must begin to converse about our conversations (dialogue); as enterprises, we must begin to organize our organizing (networks of networks: eco-systems); and as eco-systems, we must begin to coordinate our coordinating (systems of awareness-based collective action, or ABC).”

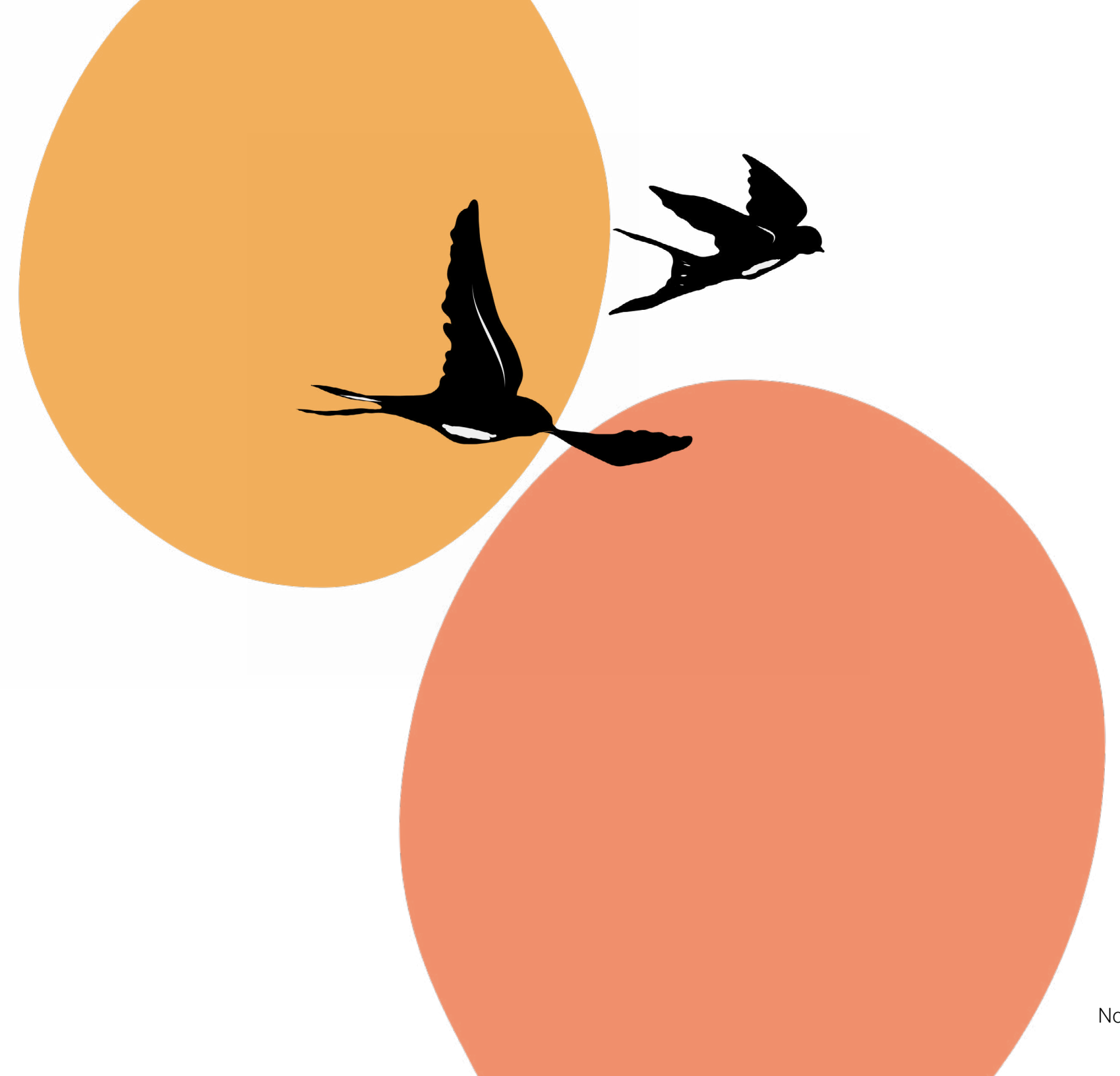
– C. Otto Scharmer, *Leading from the Emerging Future: From Ego-System to Eco-System Economies*

**May 2020: deep resonance -
Sense-making & Social Arts**

- **01.05.** Swiss Exhale 3: Input on iceberg model, opening the mind
- Cohort gathering -> Begin research on the “Mind” level, gather facts, data, interview experts, narratives in the media etc.
- **08.05.** Global Inhale 4
- **15.05.** Swiss Exhale 4: Connecting with an open heart
- Cohort gathering -> Go deeper on the “heart” level”, what touches me, find the margins/marginalised, stakeholder dialogues...
- **22.05.** Global Inhale 5
- **29.05.** Swiss Exhale 5: Open will, introduction to root causes
- Cohort gathering -> Enter the “open will” space, turn the camera around, root causes, what do we all need to let go off? Presencing (supportive journaling practice, social arts).

June 2020: moving with -
Vertical Social Prototyping

- **05.06.** Global Inhale 6
- **12.06.** Swiss Exhale 6: Exploration of the shared root causes across topics
- Cohort gathering -> Write your reflection paper (putting together the pieces, adding social art, drawings), and share it with different groups, to find perspectives you may have missed.
- **19.06.** Global Inhale 7
- **26.06.** Swiss Exhale 7: Harvesting reflections and insights
- Cohort gathering -> Revise the paper, prepare to share with the Swiss community
- **28.06.** Swiss Forum
- Cohort gathering -> Revise the paper, prepare to share with the Global community
- **10-11.07.** Global Forum: Moving from Ego to Eco



Mobilisation

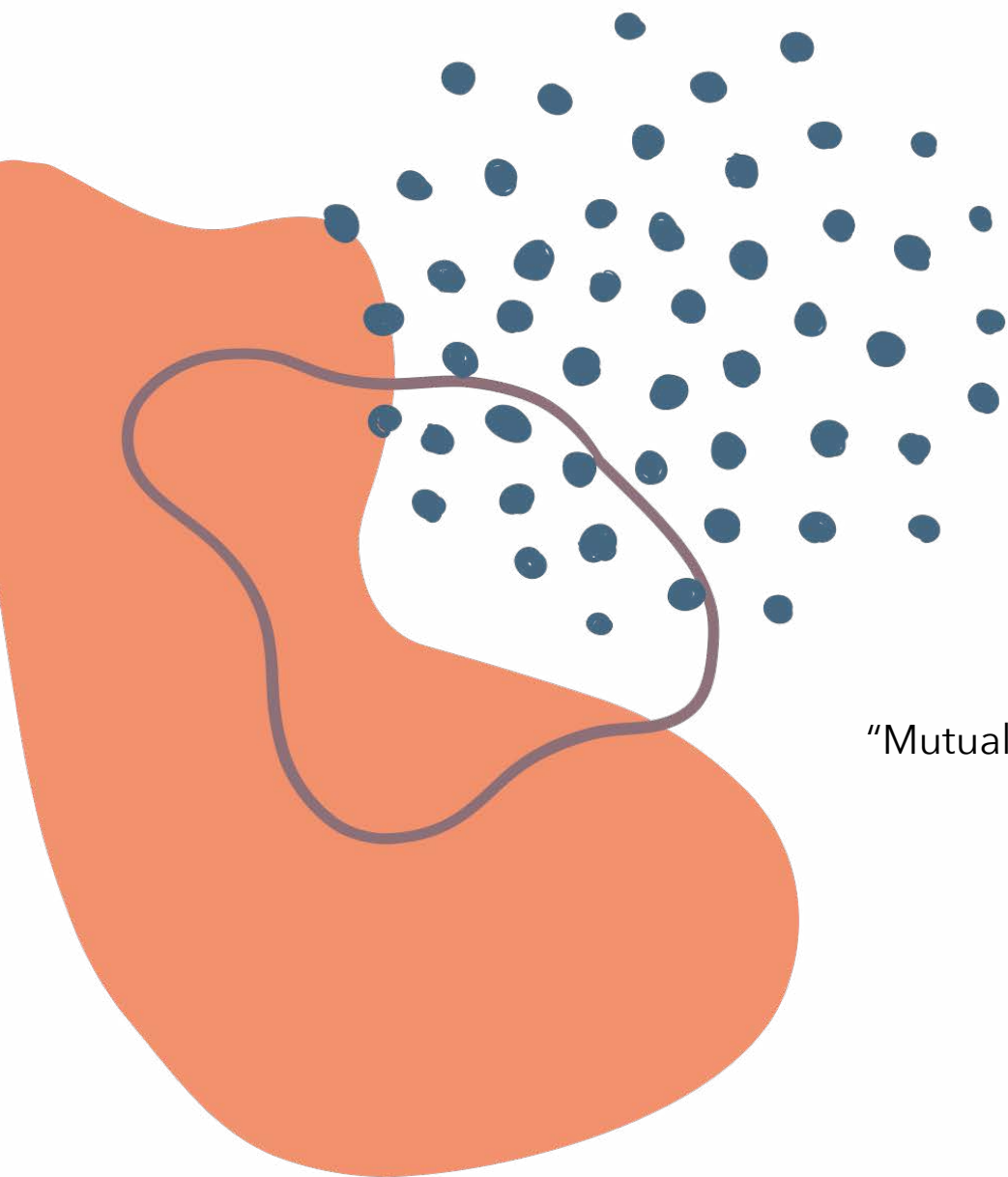
We were acutely aware that for the Nova Helvetia journey to unfold in unexpected ways, it was essential to connect to the broader public in Switzerland, activating not only our existing network and ecosystem, but also bringing together people who do not normally participate in social change initiatives. We also realised that while we threw ourselves into this work without much consideration of resources, the organisation needed additional capacity to do this work well, which, in the end, meant that we needed to find additional financial support.

- We reached out to our community members on the collaboratio helvetica digital platform
- We published Nova Helvetia as a Swiss GAIA hub on the website of the Presence Institute,
- Activated the network: invitation to stakeholders, close allies, supporters and collaborators of collaboratio helvetica to sign up for the journey
- Kept in touch with other Corona-related collective response events in Switzerland, and trying to forge alliance
- Created a fundraising portfolio, and submitted applications for funding to ensure the sustainability of the work. In the end, not only the extra work we invested was covered by foundations and private donors, but the working groups also received a significant sum to implement the developed prototype ideas. Additionally, we received money to write this guidebook, and another one about the collaborative financing process.

Campaign sent through platform:

Dear all,

This is a time of unprecedented disruption. Systems we relied on before are on the brink of collapse and immediate actions are needed on multiple levels. At the same time, beyond the much needed addressing of the symptoms, we urgently have to dedicate time and resources to the root causes - to understand them more fully, become collectively more aware of their inter-relatedness and reflect together in order to create wise(r) actions. This is why we have co-initiated the Swiss version of the GAIA journey, which started well with a growing number of participants in the "exhale" calls. Based on the global [GAIA journey](#), we are launching a 3 month process of engaging motivated individuals, pioneers and stakeholders in sense-making, sharing reflections, understanding the root causes and exploring possible solutions that address them. The process - which we call Nova Helvetia - is unfolding in thematic groups that will work together, focusing on a specific topic or question to explore. The groups will be accompanied in their reflection process and exploration of their topic, and create a reflection paper as an output that can be shared with the other groups.



“Mutual learning happens in the entropy; we need the confusion to release the new.”
- Nora Bateson, Small Arcs of Larger Circles

Introducing the working groups

From the launch of Nova Helvetia, we encouraged our ‘swarm’ to form thematic groups, in order to forge dedicated teams that remained active between the modules: they explored their respective topics through sensing journeys, stakeholder interviews and circle conversations. We did not try to control this process - people were free to move around until they found their place, groups could change their topic, they could merge with another team, or split into smaller groups, as they saw best.

In the end, we ended up with the following groups:

SDGs 3 & 13: One health & climate

COVID-19 has delivered a stark lesson about the global interconnectedness of human, animal and planetary health, known as the One Health concept. In the times of a drastically warming climate, the decisions that are taken during the next 18 months will fundamentally define the health of all future living beings. During the past two months, we have been sensing into the system to understand what actions would be needed to connect the diverse voices in Switzerland to collaborate under the One Health umbrella. What can be done to drive forward a holistic approach towards a healthier future?

SDGs 5 & 10: Gender & inclusion: Creating an inclusive future

We researched and reflected upon the effects that the COVID-19 crisis had on gender relations, with a particular focus on women* and people belonging to marginalised groups. We focused on narratives around care work, the distribution of and value differential between productive and reproductive work, changes in the world of work, gender representation in the media and increased marginalisation of certain identities within the framework of our socio-economic system. We asked questions: How is the COVID-19 crisis disproportionately affecting women*⁵ and people in precarious socio-economic situations? How might we ensure that there is equitable representation for ALL voices when approaching the process of (re)shaping our socio-economic future in the wake of COVID-19?

SDG 4: Renewing education

Our education system is based on the principles of functional knowledge learning, underlined by timetables, instructions and the school clock, where productivity and performance are key elements. Personal development and natural growth are undervalued, both in a scholastic and in a corporate environment. Many economic sectors are in the midst of a huge transformation process and industrial processes are being completely automated. The question arises, as to how this system can be changed, to focus on future skills with tailored individual support? A new culture of self organised learning is needed, to empower the current and future generations to resolve ecological, economic and social issues.

SDG 16: Democracy in transformation

Nova Helvetia created a safe space to explore core issues affecting emerging needs in our democracy, to identify and address places of disconnect between those who are in charge and the citizens, and to reflect beyond these boundaries. We acknowledge that democracy in Switzerland is at a point, where it faces profound and complex problems, calling for solutions that require a closer interaction and exchange, bridging the gap between politicians and citizens. In order to strengthen Swiss democracy, there is a need for interactive democratic mechanisms on various topics, enabling a sharing of knowledge, open discussions and collaboration, in developing prototypes of democratic processes.

SDG 17: Funding systemic change

Many innovative projects, particularly those geared towards systemic change, are struggling to get funding in Switzerland. To find out why this is so, we explored the workings of the funding mechanism, on the basis of the iceberg model, with a focus on foundations. Based on our journey, we conclude that many foundations might become truer to their mission and more effective, if they moved from expectations of immediate results, to a long-term flexible monitoring perspective geared towards systemic change. Among the prototypes that have emerged is a collaborative and peer-to-peer funding allocation mechanism within Nova Helvetia.

SDG 11: Sustainable cities and neighbourhoods

The Corona pandemic challenged our systems, especially revealed the complexity and dependencies in our cities, exposed our interconnection, which allowed most people to see how deeply we are entangled with each other. The disruptive processes and our creative or damaging responses during the last 5 months exposed our economic and financial models, social inequalities and the disregard for eco-systems, and showed that we are already in a transition due to long standing unsustainable practices. Reemerging within the fabric of urban life, woven of contributions and relatedness, we see once again families, neighbours and volunteers caring for each other, providing social support and regenerating the meaning of community. It was a beginning - but how to continue the work? ; How and when do we make the time to come together, in order to find hidden potential and agency to create regenerative cities that are blending back into natural systems?

SDG 17: Storytelling for a regenerative future

The working group 'Storytelling for a regenerative future' explores a means to inspire each other, to engage and to activate the collective potential for a regenerative culture. Stories build bridges that have the potential to overcome the root causes of disconnection from ourselves, each other and nature and help to reconnect for the benefits of all. We feel that reconnection has to start from a place of an open and curious heart, listening to people outside of our own bubble. By providing space for sharing, careful listening and harvesting the essence of underlying stories, we will eventually activate the collective potential for shifting towards a regenerative culture.

We use the * in recognition of the many different dimensions – biological, cultural, social, societal – which make up the gender identity of each individual person. When we refer to "women*", we therefore include all humans who self-identify as women, whether by nature of their assigned sex, gender expression, or gender identity.

Visibility

At the beginning of the crisis, the question we asked ourselves was: What will the future look like, now that we witnessed that it can be so different from the past?

As we embarked on the journey to find possible answers, a key aspect of the challenge was to make the work of the organisation and of the participants visible, in order to activate a collective sense of empowerment and agency in Switzerland. We shared updates regularly, throughout the entire process of the Nova Helvetia Journey. In the end, we organised a national event, the Swiss Forum, to make the work of the thematic groups visible, and disseminate the ideas that emerged. We also released a publication with all the reflection papers that contained the insights, learnings and ideas of each team.

Our Infocrow team published over 20 posts and publications, reaching more than 6500 people.



Interweaving

The pandemic revealed the complexity and interdependence of the systems that support everyday life. It made perceptible the fragility of civilisation, and invited a deeper questioning of the principles and assumptions that drive the system that upholds it. Beyond the various forms of sensing, listening and reflection that allowed the participants to move deeper and deeper in their comprehension of the root causes and entanglements of the topic they were engaging with, we created spaces of interweaving, catalysing exchange and cross-fertilisation between people, groups and themes. Cross-topic sharing of information and inter-thematic collaborations were encouraged. Throughout the three months, the work focused on expanding perspectives, holding space for contradictions and complexity, and 'staying with the trouble'.

"Complex and chaotic problems are forms of open and disorganised systems. Virtually all systems involving people are open and disorganised in nature. The unpredictability means that the only possible approach is to listen to (small and quick) feedback as a result of decisions and actions. Short feedback loops without filtering engender rapid insight as a basis for the decision-making process."
- ([Cynefin](#) framework)

Reflection papers

Following the three month long sensing journey, each working group produced a Reflection Paper, summarising their research, analyses, insights and in some cases a map of possible ways to move forward towards prototyping a solution. We offered a framework (a template) as an optional aid, but the groups generally were quite free to unleash their creativity and imagination while presenting their findings.

REFLECTION PAPERS:

- [SDGs 3 & 13: One health & climate](#)
- [SDGs 5 & 10: Gender & inclusion: Creating an inclusive future](#)
- [SDG 4: Renewing education](#)
- [SDG 16: Democracy in transformation](#)
- [SDG 17: Funding systemic change](#)
- [SDG 11: Sustainable cities and neighbourhoods](#)
- [SDG 17: Storytelling for a regenerative future](#)

Swiss Forum

In order to make the work of the working groups visible on a national level, we decided to organise a conference where each team could present their reflections and insights in a more interactive way, beyond the static publications. The Swiss Forum marked the end of the sensing and reflection phase, somewhere around half way on the U journey.

The event took place online on the 28th of June 2020. Instead of offering a summary of their findings in the form of a presentation, each group occupied a breakout room, and people could join a round table conversation around the themes they explored. It became a rare moment of human warmth, inspiration and collective energy, much needed half-way through the traumatic year of the pandemic.

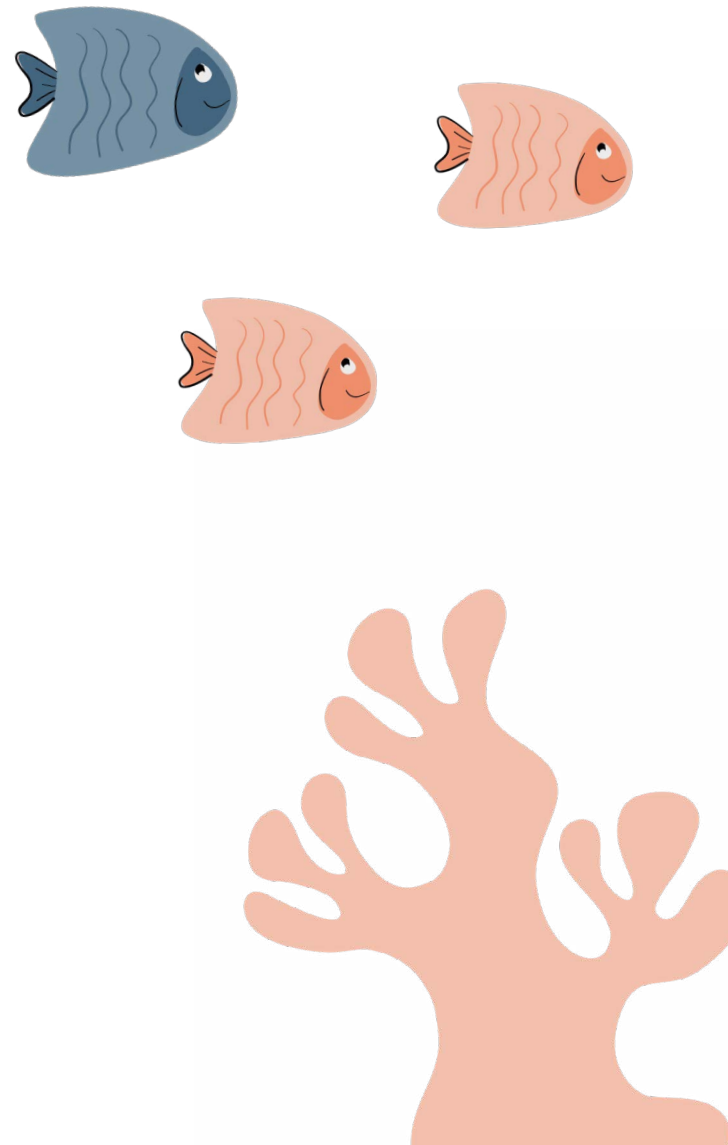
“Within the network there’s a huge potential that now became visible through collaborating on concrete projects... And hopefully sets the ground for further collaborations.”
- (anonymous participant of Swiss Forum)

Beyond GAIA: Prototypes

The original GAIA journey ended with a Global Summit in July 2020, at the 5th point of the U process - crystallising. However, we decided to harness the palpable energy and intention in the groups, and to continue the journey together. We invited each participant and each group to submit one or more prototype proposals - small experimental actions that would test the emerging ideas and solutions from the Reflection Papers. Again, we gave full freedom to everyone to re-think, re-group, to split larger teams, or even bring in new collaborators. Some groups dropped out, new teams were born, and unusual collaborations were forged. With the generous support of Engagement Migros, we had 30'000 CHF to distribute among the prototypes, which meant that people could be at least partially remunerated for their work. We received 7 prototype proposals - and decided to resist the temptation to invite experts to decide which were worth the support. Instead, we opted for a collaborative financing process called Cobudgeting, in order to allocate the funds. The prototypes are still running at the moment of writing this guidebook.

collaboratio helvetica [principles](#) - PROTOTYPING

We act through iterative processes and share our learnings
Forging the new by building on what's present, we invite playfulness and give it our best shot. We dare to fail, adjust our course and learn as a community of practice. We probe, sense and respond. We build upon each other's contributions and share our practices and knowledge openly.



Cobudgeting

Collaborative finance, and specifically, Cobudgeting, is a counter proposal to hierarchical resource distribution: it only involves the people who are actively participating in the proposal-making process. Instead of outsourcing responsible deliberation over which projects are the most feasible and meaningful at that particular moment, the entire group is invited to occupy this important leadership role, collectively.

What we did, in a nutshell:

- using the Cobudget platform, each prototyping proposal was displayed and thoroughly examined and cross-questioned by participants of the Nova Helvetia journey.
- We divided the available funds by the number of participants, giving each person the same amount, and after some time for deliberation, issued an invitation to allocate their funds among their favourite prototype proposals.
- We went through the process twice, in order to be able to reflect on the challenges and opportunities this collective allocation of resources offered, and to fully embody the responsibility of funding the future.
- We documented our learnings and created a similar guidebook to collaborative financing.

Funded prototypes

SDG8: Sustainable working experiences in organizations

How can we use examples from sports and nature as new ways of sustainable working experiences in organizations?

SDG 16: Democracy in transformation

How can we solve the complex problems that require political efficiency by implementing alternative forms of a society-led democracy?

SDG 11: Sustainable cities and neighbourhoods

How do we live together in the city? What are our dependencies, relationships, blind spots and processes, as well as our stories and mental models that hold our society together?

SDG 17: Funding systemic change

How can we transform funding allocation through stakeholder dialogue? What roles do foundations play in enabling and guiding action towards a more sustainable and ethical future?

SDG 5: Gender & inclusion: Creating an inclusive future

What were the effects of the COVID-19 crisis on gender relations, especially on women? What is the distribution and value between productive and reproductive work?

SDG 4: Renewing education

Is our education system based on functional and knowledge learning still the right one given the current transformation process? How can we change this system to focus on future skills and individualized support?

Conclusion

There is no single recipe to tell how to recognise a moment of emerging possibility, and foster collective action around it. The context, the people, the resources, the dreams and challenges are specific to each situation. This is why this guidebook offers a map of the stepping stones of the Nova Helvetia project, with elements of storytelling, rather than a prescriptive list of activities. We tried to make this map as rich in detail and honest in scope as possible - however, the map is never the territory. We hope that our guide will prove to be useful while you navigate your own terrain - and yet we urge you not to attempt to follow it too closely. The most important aspect of our work in societal transformation is a close attention and sensibility to what is present. It would be foolish to get lost in a book - rather, we strongly encourage you to lose your way in your reality and use our guidebook as a collection of tools that may help you along the way.



The work and the work

In the year of 2020, the year of the pandemic, the world shut down, nations and individuals were locked in, our bodies constricted by ever changing regulations. Business was definitely not as usual, and it was up for each person to decide whether this meant a new hope for deep change, or a terrifying disruption that would hopefully end soon. Collaboratio helvetica took the audacious step to resist the paralysis that is a natural reaction to unfolding complexity, and decided to dance with the system as it revealed itself in a way not seen before. It was not easy. We certainly overstretched ourselves, and came close to personal and collective burnout. The work - of activating a swarm, initiating and stewarding a collective sensing journey on a national level, holding space for the participants to go through a deep personal journey, supporting each group to weave together the emerging insights and ideas and craft small prototypes, and finally facilitating a collaborative financing process - was overwhelming. And yet, if we now look back, our memory of 2020 and the Covid-19 crisis is not marked by fear and paralysis, but by flowing synergies, miraculous coincidences, collective beauty, human warmth, inspiration and a tangible sense of hope. Instead of fading into the background, waiting to see how we can do our work in the new, unfamiliar situation, we held close our purpose and vision, and allowed our Work, our dedication to foster deep societal transformation in Switzerland, to give us clues on how to proceed. Step by step, into the unknown.

If you know where you are going, if you are clear on the destination and how to get there, it may be that your clarity has fooled you into thinking you have traversed worlds when you have merely substituted familiarity and intelligibility for the uncomfortable yet transformative potential of bewilderment.

- Bayo Akomolafe





Tools

We have used a wide variety of tools during the Nova Helvetia journey, which are mentioned sporadically in the guidebook itself. This is why we decided to add a brief introduction to the most important of them here, with links to:

- [Elinga, platform](#), email, drive, slack,
- [Guidelines for working groups](#)
- Harvesting templates ([open mind](#), [open heart](#), [open will & root causes](#))
- [Reflection paper template](#)
- [Worksheet "From Insight to Prototyping"](#)
- Prototype template
- [Theory U process](#)
- [Cynefin](#)
- Theory of change
- Cobudgeting
- [Dialogue](#)

Reference Materials

Websites, books, papers etc

- <https://www.presencing.org/gaia>
- <https://www.presencing.org/>
- Dave Snowden: How leaders change culture
- <https://medium.com/@brixen/dave-snowden-how-leaders-change-culture-though-small-actions-766cd2bf5128>
- Otto Scharmer: Theory U: Leading from the Future as It Emerges
- Nora Bateson: Small Arcs of Large Circles
- David Bohm: On Dialogue
- Martin Show: Snowy Tower
- Bayo Akomolafe texts <https://bayoakomolafe.net/>
- Gregory Bateson: Towards an ecology of the mind

Toolbox entries

- [From project funding to core funding: a smart move?](#)
- [Small but practical changes towards more inclusion at workplaces](#)
- [Citizen Assemblies](#)
- [FlowConnection](#)
- [Agility and perseverance to Fund the Future](#)
- [Funding the future: the crucial role of foundations](#)
- [Swiss Forum: Schweizerinnen und Schweizer über ihre Visionen für eine Post-Corona-Schweiz](#)

BIG THANK YOU TO OUR SUPPORTERS



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