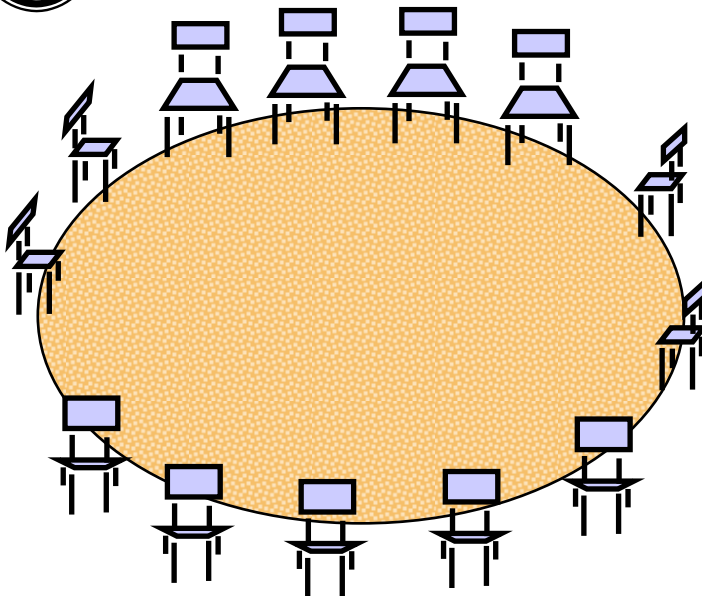# Tools for Opening Space
A Collection of
Open Space Technology Resources

The
Law of
Two
Feet

The Four Principles

Whoever comes is the right people. Whatever happens is the only thing that could have. Whenever it starts is the right time. When it is over it is over.

Brought to you by:

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Table of Contents

Before the Event
Checklist

Pre-event Planning with Sponsor (See notes on Sponsor Decisions)
➢ Determine whether OS is a good fit
➢ Name the theme
➢ Determine who to invite, estimate how many attending
➢ Set date
➢ Select space (see notes on OS Spaces)
➢ Decide what, if anything, to do about assessing the outcomes
➢ Plan strategy for getting support from the people who can impact the event
➢ Send invitation

Logistics
➢ Work with "space" staff on set-up
  o Provide an article or book on OST
➢ Room set-up
  o Confirm how main circle will be set
  o Identify breakout spaces
  o Get list of breakout room names, maps to rooms, if needed
  o Any signage required to identify spaces?
➢ Plan meals (ideally buffet; food that can be out for several hours)
  o Arrange details with caterer (breakfast, lunch, dinner, breaks)
  o Arrange for any special food needs
➢ Arrange for wireless microphone, plus spare battery
➢ Proceedings plans
  o Done by hand? By computer? By e-mail?
  o If by computer, arrange for computers (about 1 per breakout space)
    o 1 printer
    o Adequate power, tables for computers, software (e.g., Word)
  o Internet site arrangements?
  o Cover design?
  o Introductory remarks?
  o Participant list (contact information)
  o Arrange for copying proceedings or for upload to internet/intranet site
➢ Prep sponsor for doing opening and their role (participate!)
➢ Any legal issues to consider?
➢ Any union issues to consider?
➢ Set date for debrief

Supplies

Main Circle
- Paper for Issues (quartered chart paper)
- Magic Markers (lots, create a feeling of abundance)
- Post-its (1 pack of 3x5 to make time-space grid)
- Tape on agenda wall

Breakout Spaces
- Masking tape (1 roll per breakout space)
- Magic markers (2-3 per breakout room)
- Flip charts (1 per breakout room)
- Convener responsibility sheet to help with note taking

Registration
- Registration list
- Name tags, pens for writing names if not pre-printed
- Any welcome materials (logistics information, journal, pen)

Day of event set up
- Suggest sponsor write proceedings introduction sometime during the event
- Set up registration table (sign, name tags, pens, list: names, phone #s, addresses)
- Set up message area, registration table, signage, computers, microphone
- Make signs (law, principles, surprise, news room, theme, time/space matrix, breakout space labels)
- Make circle, put blank paper for issues and markers in center
- Put supplies in break out rooms

Post Event
- Hold debrief
- Copy and distribute proceedings and/or put on internet site
- Write thank you's
- Any assessment activities?

Before the Event
Sponsor Decision Areas

Theme & Intent

Stakeholder Invitation

Process & Timeframe

Context

What is perceived to not be open for change? (Strategy, policy, legal, structural, process, financial)

Open Space

Expectations for Outcomes

How will results be used? What degrees of freedom for action does the group have?

Strategy for Sustaining the Results

What forms of communication, management will support people and their work?

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Adapted from Larry Peterson,
*Larry Peterson & Associates in Transformation, 416-653-4829*

Before the Event
Choosing a Space

- Seating capacity for the circle (Room capacity is stated assuming theatre style seating. For a circle, rule of thumb is to take half of the stated capacity).
  For example, if 60 are expected, look for a seating capacity of 120

- Unobstructed wall space large enough to hold the agenda, with room for the news room.
  Estimate of 15-20 feet for 20 sessions.

- Sufficient break-out space
  Figure 1/3 of the people will post sessions, so 60 people with time for 2 sessions will require about 10 spaces that will hold about 6-10 people each) The calculation: 60 people/3 = 20 sessions; 20/2 = 10 per time period

- Permission to use tape on the walls

- If computers will be used for notes, adequate access to electricity

- Setting conducive to good conversation

Nice to have:

- Natural light

- Convenient rest room locations

- The more square-shaped the room, the better

- Adequate space for registration table, food

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Before the Event
Determining How Much Time
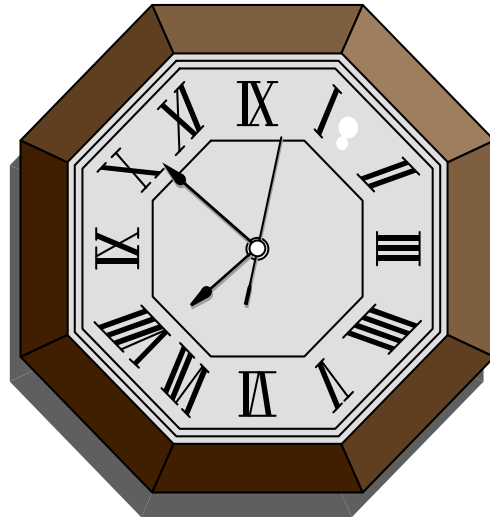
- Half day = uncover what's on the top of people's minds

- One Day = Meaningful, productive discussion

- Two Day = Deep exploration of the theme and a set of proceedings

- Two and a Half Day = Deep exploration of theme, set of proceedings and action plans

Before the Event
Budget Template

	Unit Price	Quantity	Budget	Actual
SPACE				
Main Room			$0.00	
Break out rooms				
Small			$0.00	
Medium			$0.00	
Large			$0.00	
Space Sub-total			$0.00	
FOOD				
Monday dinner			$0.00	
Tuesday				
Breakfast			$0.00	
Morning break			$0.00	
Lunch			$0.00	
Afternoon break			$0.00	
Wednesday				
Breakfast			$0.00	
Morning break			$0.00	
Lunch			$0.00	
Afternoon break			$0.00	
Food Sub-total			$0.00	
AUDIO-VISUAL				
Microphones				
Audio-Visual Sub-total			$0.00	
SUPPLIES				
Break out rooms				
Markers		0		
Masking Tape		0		
Flip Charts		0		
Break Out Rooms Sub-total			$0.00	
Main Room				
Flip chart paper				
Post-its (1 pack)				
Main Room Sub-total			$0.00	
Welcome Packets		0		
Journal			$0.00	
Felt tips			$0.00	
Hotel Materials			$0.00	
Name tag holders			$0.00	
Name tags			$0.00	
Welcome Packets Sub-total			$0.00	$0.00
Supplies Sub-total			$0.00	$0.00

COMPUTERS
  PC's
  Printer(s)
  Tables/Other

Computers Sub-total	$0.00	$0.00

WEB SITE

Web site Sub-total	$0.00	$0.00

COPYING THE PROCEEDINGS
  Cover Page
  Copying Costs
  Mailing Costs

Copying Sub-total	$0.00	$0.00
TOTAL	$0.00	$0.00

CONSULTING FEES

Consulting Sub-total	$0.00	$0.00
GRAND TOTAL	$0.00	$0.00

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Before the Event
Sample Invitations

N

MOBILIZING THE QUALITY COMMUNITY
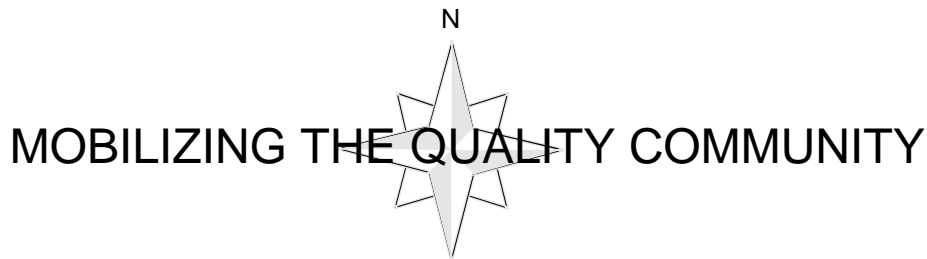
THE TIME: February 27, 4:00 p.m. to March 1, 5:00 p.m.

THE PLACE: [place name]

THE PURPOSE: To mobilize the quality community and build teamwork around its purpose;

Consider:
- ☞ The urgency and issues facing the business: service, growth, costs
- ☞ How the quality community serves its customers in serving [company name]'s customers
- ☞ Moving towards [company name]'s vision through applying the Guiding Principles

SOME OUTCOMES: Specific actions for addressing the needs the participants believe are vital to the business

A stronger network of people for getting things done

THE HOSTS: Total Quality Services

THE INVITEES: Total Quality Services
The Quality Network
Entity Coaches
Quality Network members: invite up to 2 key contributors to your quality effort from your entity

THE APPROACH: On Monday evening, we will involve everyone in establishing common ground. On Tuesday and Wednesday, we will use a method that enables groups of all sizes to effectively deal with complex issues in short time periods. Expect to work hard and to have fun. And expect the unexpected.

TO REGISTER: Contact [name] by [date] 10 at [phone number]

LOGISTICS: Dress is casual.

Food is on us.
Travel and lodging are on you.

FOR MORE INFORMATION, CONTACT:
[name1] [phone] [e-mail address]
[name2] [phone] [e-mail address]
etc.

See you there!

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YOU ARE INVITED TO JOIN US!
Tuesday, March 11th 2003

A Quantum Leap in Customer Service

Why Attend?
We are already a high performing team! This is a chance to talk with your colleagues about what makes us great and what can make us even better. Whatever you care about -- from the practical to the philosophical -- is welcome.

We've got challenging goals around personal excellence and performance. This is a day to build on our strengths, uncover ways of implementing best practices across teams; even impact the whole organization. We are coming together because every one of us has something important to offer to make this happen. So, come prepared to work hard and have fun as we take a leap forward.

8:30 – 9:00 Coffee, Tea, and Breakfast goodies will be served
9:00 Morning Session
Lunches available from noon - 1:30 (Boxed Lunches will be provided)
1:30 Afternoon Session (afternoon snack provided around 2:30)
4:00 Adjourn

Location: Cedar River Watershed Education Center

http://www.cedarriver.org

Please RSVP to [name] with any lunch preferences [e-mail address]

Day of Event
Setup Checklist
These pages enable you to turn tasks over to others who have come to help with setup.

SIGNAGE
Principles
Law
Theme
Be prepared to be surprised
Meeting room/Meeting time grid
        News Room
Arrows, as needed
Space Labels, as needed

TABLES
Registration (with registration list, name tags, welcome materials)
Coffee, tea, food
Resources to share
News Room (topic list, with computers, 1 printer, copy of registration list)

MICROPHONES

ROOMS
Main circle: session paper, markers
Break out rooms: chart paper, markers, tape, convener responsibilities sheet
Tape on the agenda wall

BRING
1. Bells to call people to Evening News and Morning Announcements
2. Electronic copy of: Topic List, Open Space Report Template, Computer Instructions, Convener Responsibility Sheet, OS checklist, OS opening, closing
3. Computer media to copy reports to computer connected to the printer and collect the full proceedings
4. Hard copy of the documents listed in #3, with sufficient numbers of the Convener Responsibility Sheet
5. Sample proceeding introductions
6. Talking Stick
7. Name tags
8. Digital camera
9. Business cards
10. Schedule for the day(s)

PRINCIPLES

1. Whoever comes are the right people.

2. Whatever happens is the only thing that could have.

3. When it starts is the right time.

4. When it's over, it's over.

The Law of Two Feet

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		Tuesday, AM		Tuesday, PM			Wednesday, AM			Wednesday, PM		
8:30-9:30	**9:30**	**11:00**	**12:30**	**1:30**	**3:00**	**4:30-5:00**	**8:30-9:00**	**9:00**	**10:30**	**12:00**	**1:00**	**2:30**	**4:00-5:00**
Opening Circle	Room A	Room A 9:00	Room A 10:30	Lunch	Room A 1:30	Room A 3:00	Evening News	Morning Announcements	Room A 9:00	Room A 10:30	Lunch	Room A 1:30	Room A 3:00	Evening News
	Room B	Room B 9:00	Room B 10:30		Room B 1:30	Room B 3:00			Room B 9:00	Room B 10:30		Room B 1:30	Room B 3:00	
	Room C	Room C 9:00	Room C 10:30		Room C 1:30	Room C 3:00			Room C 9:00	Room C 10:30		Room C 1:30	Room C 3:00	
	Room D	Room D 9:00	Room D 10:30		Room D 1:30	Room D 3:00			Room D 9:00	Room D 10:30		Room D 1:30	Room D 3:00	
	Room E	Room E 9:00	Room E 10:30		Room E 1:30	Room E 3:00			Room E 9:00	Room E 10:30		Room E 1:30	Room E 3:00	

Generic Room Layout

Breakout Spaces

Main Circle

Newsroom (Computers & Reports)

Breakout Space
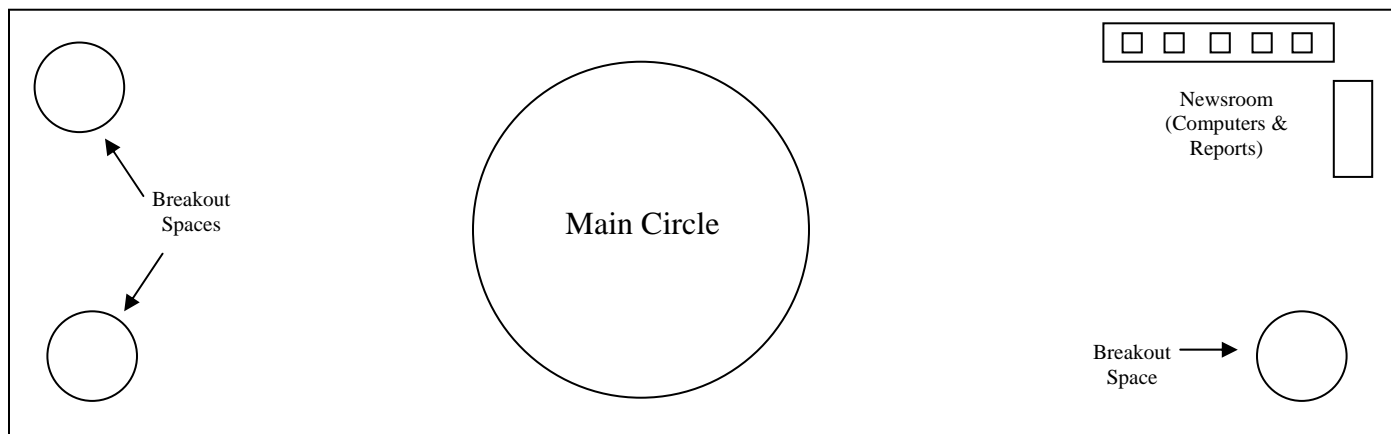
Day of Event
Convener Responsibilities Worksheet

Convener's Responsibilities

- Identify a scribe (you may do it yourself or ask for a volunteer)
- Record the name of the session and the convener's name below
- Start the discussion
- List participants below.
- Capture the discussion from your session (see the notes at the bottom of the page)
- Enter your notes in a computer at the "News Room". They will be posted immediately and included in the proceedings.
  -- or if you, as facilitator, choose e-mail rather than a newsroom --
  E-mail your notes to [NAME] at [E-MAIL] by [DATE].

Topic:

Convener:

Participants List

<u>Name</u>

Some thoughts about your notes:
- Capture the discussion and recommendations for action in way that can be understood by someone who wasn't there
- Use whatever media works best for you: flip charts, notebook notes, and/or visual images.

Day of Event
Topic Log

TOPIC NAME	AUTHOR	LOCATION
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		
11.		
12.		
13.		
14.		
15.		
16.		
17.		
18.		
19.		

Day of Event
Computer Report Template

TOPIC

TOPIC NAME:

CONVENER:

PARTICIPANTS:

DISCUSSION/SUMMARY

Day of Event
Opening Outline

While it comes out differently every time I open a space, here's my starting point. I still read through this at least once as part of my preparation.

I. Welcome; Create space
  A. [Brief introduction by sponsor]
  B.Introduce myself, honored to be here
  C.[speak slowly, calmly] Sit back, take a deep breath, if you like close your eyes and think about a time when [theme] made a difference in your life (e.g., when work-life balance…). What was happening? Who was involved? What made it so powerful? How has it affected the way you relate to the [theme] today?
  D.Ask people to open their eyes, look around the circle as I begin walking the circle
  E.Look around and know there are many powerful stories about the [theme] in this room. And the skills, ability, knowledge,...caring are in this room to truly make a difference

II. State the theme
  A. State it clearly, succinctly and provocatively (e.g., work-life balance: what's next?)
  B. Expectations for outcome (e.g., get as specific as you can so that you can leave here and act)
  C. Constraints and commitments (e.g., Rich [the sponsor] will support you in anything you come up with within his span of control; he will work with you to make happen anything that involves contractual, budget or crosses department lines in service to customers)

III. How does this work?
  A. Point to the blank wall; here's your agenda, promise in next 30 minutes you'll wonder how we'll do it all
  B. Pick some useful examples to express the potential for magic (e.g., designing airplane doors at Boeing, planning the future of Rotary Clubs in Siberia)
  C. OS is based on the belief that organizations run on passion and responsibility – they work when people take responsibility for what they care about
    1. Write issue, name, announce, post – explain how time/space matrix works
    2. When everyone who cares to has done so, sign up for as many as you are interested in
    3. Not brainstorming – about passion because there's responsibilities: responsibility: to convene group, document session – provide details how this will be done, when they'll see the reports, and how it will be used; if posting breaking news, let them know
    4. Will create a book with all the sessions; explain how proceedings will be handled

D. Housekeeping
   1. Food, breaks logistics
   2. Evening News, Morning Announcements
   3. Bells for gathering everyone together

IV. Principles
  A. Whoever comes are the right people
    1. Don't need the CEO, or hundreds of people; just who cares
    2. Only one? When was the last time you had quiet time to think and write about something you really cared about? Go for it!
  B. Whatever happens is the only thing that could have
    This principle serves as an important and useful reminder about *letting go.* As soon as we enact our choices, they become what happened, and accepting them as fully as possible and letting go is a very useful practice."
    1. The attention is on Now, enjoy the moment
    2. About letting go of expectations: coulds, shoulds; whatever is, is; work with it
  C. When it starts...
    1. The last 2 principles are about our relationship with time. Rather than letting the clock rule, use it as information and follow your own energy
    2. Thus, a reminder that creativity does not happen according to a schedule but starts when it starts
  D. When it's over, it's over
    1. And things don't end by the clock but by noticing your energy.
    2. Done in 10 minutes? Great! Move on.
    Corollary: when it's not over, keep going until you're done
  E. Law of 2 Feet (the Law of Mobility, What moves you)
    1. Do a quick check to see that everyone has two feet. If not, frame it as the Law of Personal Responsibility
    2. Define it: there is a foot of passion and a foot of responsibility. When you are neither learning nor contributing use your two feet and move somewhere else; also about standing up for what you believe
    3. Fundamentally about personal responsibility: its up to you to take a stand get your own needs met ("If it's to be, it's up to me")
    4. Two animals
      a) Bumblebees
        (1) Cross-pollinate ideas
        (2) That's why you can sign up for things at the same time; it's possible to be in multiple places at once
      b) Butterflies: they look very delicate and they're deceptive in their impact
        (1) May never attend a session; they stay at the edges, perhaps by the food or a quiet corner
        (2) You sit down and have a quiet, reflective talk with one of them; a chance remark may impact you're thinking and you take it back into the larger group and it affects others

(3) So, if you're irritated by people who never go to the sessions, know they do serve a useful purpose; if you're one of them, you don't need to feel guilty about it – in open space you're valued.

    5. Death to egotists: moderates their behavior knowing that people can leave if they hog air time

F. Be prepared to be surprised

    1. Never before, never again will this group be together

    2. If you walk out with just what you expected, you've blown it -- be open for the unexpected and it will show up

    3. Proust quote: "The voyage of discovery consists not in finding new lands but in seeing with new eyes"

V. Do it

A. Its time, remember, if your issue or pet peeve is not addressed, look to yourself

B. My hope for you, that you reach your goals...that magic happens

C. So, I invite you now to come into the circle, write down your topic, your name, announce it and we're underway

D. For safety purposes, particularly with larger groups, ask them to move the chairs near the agenda wall out of the way

E. Some useful things to mention while people are writing

    1. Encourage them to keep sessions separate even if similar; if there are a lot of people, everyone gets more air time if the groups are smaller

    2. Handling conflicts and combinations: negotiation is find; the final decision is owned by the convener(s)

    3. If there are more sessions than time/space post-its, remind them that space is infinitely expandable. Write in a time and place.

    4. Write your names on the sessions you want to attend; you're not locked in and it gives the conveners a feel for how many are interested in coming

Day of Event
Reflection Circles (Evening News)

At the end of the day and the end of a gathering, there is always a reflection circle. It is part of the rhythm of Open Space: come together to begin, follow what has heart and meaning through the day, come together to end, disperse for the evening, and the next morning, begin again.

The role of reflection is to deepen the learning and strengthen the connections, individually and collectively. It can be the most powerful aspect of an Open Space event because people are respectfully witnessed as they speak of their experience.

I always begin reflection with silence. With a group not very comfortable with silence, I offer this as a time to collect their thoughts after what was no doubt a very verbal day. For groups that are comfortable with silence, it is a time to connect with spirit, a time to listen to their own inner voice and sense their connection to each other and the whole.

Closing an Open Space happens in many ways. It is largely dependent on the purpose of the gathering. When there is a need to converge, then whole other activities can be involved. Always keep in the style and spirit of the gathering.

There are two basic areas in which people can reflect:

- What content related things came out for them (What did they notice? What were their ahas?);
- What did they learn about the principles in action (How does this process apply back in the real world?)

Basic order

Make any announcements

Deal with any remaining logistics about the proceedings, both getting in materials and getting them distributed

Acknowledge them and what they've accomplished

Then it's time for silence and reflection

When there's lot's of time
Pose a question that invites people to tap into a heartfelt place around their experience. I usually develop the question on the last day.

Remind them of the committed time for the close and to pace themselves accordingly. Left on their own, with no request around time, I find people will average 5 minutes each.

Explain the use of a talking object (as a gift from Native Americans – whoever has the stick talks, everyone else listens. There are responsibilities for both the talker to speak with respect, listen with respect -- and to respect the time available. If the group wants to continue after The End Time -- so be it -- but everybody else is free to use the Law of Two Feet.)

Generally, I'll look for something in the room that would be meaningful to the group to use as the talking object.

I put the stick in the center, suggest some silence and when someone is ready, they can get the stick, bring it to their seat, speak and then pass it to the person next to them.

When you need to be fast
Pose a question that invites people to tap into a heartfelt place around their experience. I usually develop the question on the last day.

Remind them of the committed time for the close.

Ask people to think of a word, a phrase a sentence that responds to the question. Sometimes I'll ask them to write down something that they think would be useful to remember: a task, a commitment, an idea and put it above their desk or someplace where they can reference it later.

The talking stick is passed as above, with people speaking (or reading) their word, phrase or sentence. I've used this in a group of 230 and we were finished in 25 minutes.

Reflective Questions
I have been collecting questions for a while. Here are some of my favorites.

How do we get this spirit out of the room? – Chris Corrigan, chris@chriscorrigan.com

As a result of this session, I... – Chris Corrigan, chris@chriscorrigan.com

Based upon your view of all of the possibilities discussed and explored, how do you personally wan to use your energy, your two feet to further what's happened?

In light of what you've read and experienced, how do you personally want to use your time and energy to actualize what you want?

This is a time for learning and reflection. Learning is about noticing distinctions. What did you notice?

What is necessary to support this spirit, action, work, project, whatever, going forward?
Michael Herman, mherman@globalchicago.net

What is possible now?
Open Space on Open Space, Toronto, 1997

What surprised you?
What inspired you?
What challenged you?
What touched you?
From Angeles Arrien's Four Fold Way

Other Useful Items
Introductions to Open Space

Open Space Technology: An Executive Summary
by Michael Herman, mherman@globalchicago.net

What is Open Space Technology?

Open Space Technology is one way to enable all kinds of people, in any kind of organization, to create inspired meetings and events. Over the last 15 years, it has also become clear that opening space, as an intentional leadership practice, can create inspired organizations, where ordinary people work together to create extraordinary results with regularity.

In Open Space meetings, events and organizations, participants create and manage their own agenda of parallel working sessions around a central theme of strategic importance, such as: What is the strategy, group, organization or community that all stakeholders can support and work together to create?

With groups of 5 to 1000 -- working in one-day workshops, three-day conferences, or the regular weekly staff meeting -- the common result is a powerful, effective connecting and strengthening of what's already happening in the organization: planning and action, learning and doing, passion and responsibility, participation and performance.

When and Why?

Open Space works best when the work to be done is complex, the people and ideas involved are diverse, the passion for resolution (and potential for conflict) are high, and the time to get it done was yesterday. It's been called passion bounded by responsibility, the energy of a good coffee break, intentional self-organization, spirit at work, chaos and creativity, evolution in organization, and a simple, powerful way to get people and organizations moving -- when and where it's needed most.

And, while Open Space is known for its apparent lack of structure and welcoming of surprises, it turns out that the Open Space meeting or organization is actually very structured -- but that structure is so perfectly fit to the people and the work at hand, that it goes unnoticed in its proper role of supporting (not blocking) best work. In fact, the stories and work plans woven in Open Space are generally more complex, more robust, more durable -- and can move a great deal faster than expert- or management-driven designs.

What will happen?

We never know exactly what will happen when we open the space for people to do their most important work, but we can guarantee these results when any group gets into Open Space...

1. All of the issues that are MOST important to the participants will be raised.
2. All of the issues raised will be addressed by those participants most qualified and capable of getting something done on each of them.
3. In a time as short as one or two days, all of the most important ideas, discussion, data, recommendations, conclusions, questions for further study, and plans for immediate action will be documented in one comprehensive report -- finished, printed and in the hands of participants when they leave.
4. When appropriate, and when time is allowed for it, the total contents of this report document can be focused and prioritized in a matter of a few hours, even with very large groups (100's).
5. After an event, all of these results can be made available to an entire organization or community within days of the event, so the conversation can invite every stakeholder into implementation -- right now.
6. AND... results like these can be planned and implemented faster than any other kind of so-called "large-group intervention." It is literally possible to accomplish in days and weeks what some other approaches take months and years to do.

The good news, and the bad news, is that it works. Good news because it gets people and work moving, bad news because that may mean lots of things are going to be different than before. Wanted things can appear, unwanted things disappear, and sometime vice versa -- but that's how life is.

In short, then, Open Space brings life back to organization and organizations back to life.

Michael Herman and Michael Herman Associates, www.michaelherman.com, specializes in Open Space Technology and inviting movement in organizations. To learn more about Open Space Technology, mailto:mherman@globalchicago.net, or phone at (312) 280-7838.

Michael also created Worldwide Open Space, the website of the Open Space Institute USA which serves as a portal and gathering point for Open Space friends and practitioners from everywhere. www.openspaceworld.org

Other Useful Items
Introductions to Open Space

What is Open Space Technology?

Here's how Harrison Owen, hhowen@comcast.net, creator of Open Space Technology, answers the question:

At the very least, Open Space is a fast, cheap, and simple way to better, more productive meetings. At a deeper level, it enables people to experience a very different quality of organization in which self managed work groups are the norm, leadership a constantly shared phenomenon, diversity becomes a resource to be used instead of a problem to be overcome, and personal empowerment a shared experience. It is also fun. In a word, the conditions are set for fundamental organizational change, indeed that change may already have occurred. By the end, groups face an interesting choice. They can do it again, they can do it better, or they can go back to their prior mode of behavior.

Open Space is appropriate in situations where a major issue must be resolved, characterized by high levels of complexity, high levels of diversity (in terms of the people involved), the presence of potential or actual conflict, and with a decision time of yesterday.

Open Space runs on two fundamentals: passion and responsibility. Passion engages the people in the room. Responsibility ensures things get done. A focusing theme or question provides the framework for the event. The art of the question lies in saying just enough to evoke attention, while leaving sufficient open space for the imagination to run wild.

The principles of Open Space
- *Whoever comes is the right people.*
- *Whatever happens is the only thing that could have.*
- *When it starts is the right time.*
- *When it's over, it's over.*

These principles are simple statements of the way things work. While they may appear counter-intuitive to some, they are my observations of what always happens when people interact.

The Law of Two Feet says to stand up for what you believe and if you feel you are neither contributing nor learning where you are, use your two feet and go somewhere else. The law is fundamentally about personal responsibility. It makes it clear that the only person responsible for your experience is you.

From Owen, Harrison, (1999), Open Space Technology. In (Holman, P. & T. Devane (Eds.), <u>The Change</u>
<u>Handbook: Group Methods for Shaping the Future</u> (pp. 235-237). San Francisco: Berrett-Koehler
Publishers.

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Other Useful Items
Two Page Primer

DOING AN OPEN SPACE: A TWO PAGE PRIMER

WHAT IS OPEN SPACE?
It is a self-organizing practice of inner discipline and collective activity which releases the inherent creativity and leadership in people. By inviting people to take responsibility for what they care about, Open Space establishes a marketplace of inquiry, reflection and learning, bringing out the best in both individuals and the whole.

WHEN TO USE IT:
- Where conflict is holding back the ability to change
- Where the situation is complex
- Where there is a high degree of diversity
- Where there is an urgent need to make speedy decisions
- Where all stakeholders are needed for good decisions to be made
- Where you have no preconceived notion of what the outcomes should be

PROBABLE OUTCOMES:
- Builds energy, commitment and shared leadership
- Participants accept responsibility for what does or doesn't happen
- Action plans and recommendations emerge from discussions as appropriate
- You create a record of the entire proceedings as you go along

HOW IT WORKS:
The Law of Two Feet means you take responsibility for what you care about -- standing up for that and using your own two feet to move to whatever place you can best contribute and/or learn.

Four principles apply to how you navigate in open space:
Whoever comes is the right people
Whoever is attracted to the same conversation are the people who can contribute most to that conversation—because they care. So they are exactly the ones—for the whole group-- who are capable of initiating action.
Whatever happens is the only thing that could've
We are all limited by our own pasts and expectations. This principle acknowledges we'll all do our best to focus on NOW-- the present time and place-- and not get bogged down in what could've or should've happened.
When it starts is the right time

The creative spirit has its own time, and our task is to make our best contribution and enter the flow of creativity when it starts.

When it's over, it's over

Creativity has its own rhythm. So do groups. Just a reminder to pay attention to the flow of creativity -- not the clock. When you think it is over, ask: *Is it over?* And if it is, go on to the next thing you have passion for. If it's not, make plans for continuing the conversation.

HOW OPEN SPACE WORKS WHEN THERE IS CONFLICT:

The Law of Two Feet gives participants freedom to move at any time to a discussion they care about. Caring creates common ground, and helps to remind participants of higher purpose.

GROUP SIZE:

To date, we know that Open Space accommodates groups from 5 to 1500 people. It can be run for a couple of hours to 3 or more days; consecutively or over time; at one site or at multiple sites connected by computer and/or phone and video. The longer the space is open, the more transformative the outcomes.

THE STEPS IN BRIEF:

1. Select a focusing statement or question for your gathering. It should frame the higher purpose and widest context for your discussion in a positive way.
2. Invite the circle of people: all stakeholders or all the people you'd like to have in the room. Include the theme, date, place and time of gathering in the invitation.
3. Create the circle: Set up chairs in a circle or in concentric circles, leaving space in the center. Choose a blank wall for the Agenda Wall and label it AGENDA: AM, PM across the top. Set up a table for computers near a wall you label NEWS. Put blank sheets of news print (about quarter size of a flip chart page) and colored felt pens in the center of the circle. Near the Agenda Wall and the News Wall put masking tape for people to post papers on the walls.
4. To begin the gathering: Facilitator explains: the theme, the simple process the group will follow to organize and create a record, where to put things up and find out what is happening, the Law of Two Feet, and the Principles of Open Space. Then, facilitator invites people to silently meditate on what has heart and meaning for each of them.
5. Opening the marketplace: the Facilitator invites anyone who cares about an issue to step into the middle of the circle and write the topic, their name, a time and place for meeting, announce it and post the offering on the Agenda Wall -- one sheet per topic—as many topics as he/she wants. They will be conveners who have responsibility for facilitating their session(s) and seeing to it that a report is made and shared on the News Wall.

6. When ALL offerings are concluded, the Facilitator invites people to sign up for what they are interested in and take responsibility for their schedules, using the Law of Two Feet.
7. People participate in discussions. The Facilitator takes care of the space. Reporters enter discussion reports in the computers and printouts are posted on the News Wall.
8. Closing Circle: all reconvene an hour before closing to share highlights, "ahas" and key learnings in a Dialogue format: simply listening to whatever people have to offer without discussion, or you can pass a "talking stick" for each person to hold as he/she is talking, or to pass along if the person doesn't want to contribute anything.
9. Mail out whatever record is created and an address list to all who came.
10. If it is a several day gathering, do steps 3 through 8 daily.

From: Anne Stadler, annestad@nwlink.com

Other Useful Items
The Role of the Open Space Facilitator
By Michael Herman, mherman@globalchicago.net

The **ideal** open space facilitator, so the story goes, is fully present and totally invisible. In the meantime, the open space facilitator may be seen doing the things listed below.

- Support planning meetings and other preparatory conversations to address whole range of pre-event issues:
    o Strategic issue(s) or purpose for the meeting/event
    o Identification of the non-negotiable "givens" within which participants will be invited to work
    o Drafting of the invitation document and method of distribution
    o Development of the invitation list and process of registration
    o Determination of event location and timing
    o Answer emergent questions about design, process, outcomes, logistics
    o Clarify assumptions and expectations about what we know and do not know about what will happen during our time together in open space
    o Coach sponsors of event on how to answer questions from invited participants

- Review the invitation, once it has been produced as a draft by the sponsoring organization(s) and/or planning committee. Write an "agenda" for the event, if required.

- Visit the space proposed for the OS, meet site staff, and confirm availability of essential needs, tape-able wall space, open space for circle, breakout spaces.

- Supply a detailed list of required materials and equipment and supporting their acquisition as necessary.

- Set-up the facility before the event, including conversation with hotel/site staff to help them understand and work most easily with the open space environment.

- Prepare a single sponsor/leader to open the space, introduction and 3-minute story of how we got to this moment of opening.

- Facilitate the event, including opening agenda-making session, morning and evening news sessions, voting and prioritization of issues, next steps planning, and closing circle. This is usually the most visible and least time-consuming part of the facilitator's work.

- Coordinate the production of a proceedings document for all participants
    o Create proceedings document with cover, invitation, ballot, notes, participant list

- o Coordinate gathering and compilation of notes from workings sessions
  - o Deliver finished document for overnight copying, pickup and distribute copies
  - o Add "next steps" action-planning session notes to main document
  - o Enable ongoing open space via website, email list and/or .PDF documents

- Debrief with planners/leaders at the end of each day, as needed.

- Facilitate a 3- to 4-hour follow-up meeting, 6 to 8 weeks later, with leaders, conveners and/or others, to see what has happened with "next steps" and determine what, if any additional steps should be undertaken. Better yet... hold a 2-day training and practice workshop and teach a bunch of people to facilitate the immediate next steps and next meetings to follow the first big event.

Michael Herman and Michael Herman Associates, www.michaelherman.com, specializes in Open Space Technology and inviting movement in organizations. To learn more about Open Space Technology, mailto:mherman@globalchicago.net, or phone at (312) 280-7838.

Thanks to Michael M Pannwitz, whose email message provided inspiration and the beginning content for this page.

http://www.globalchicago.net/wiki/wiki.cgi?OpenSpaceTech/RoleOfTheFacilitator

Other Useful Items
Convergence Approaches

This excerpt from a paper created by Lisa Heft, lisaheft@openingspace.net, provides a range of ideas on focusing the energy for action following an Open Space event.

converge - 1691, from L.L. *convergere* "to incline together" from *com-* "together" + *vergere* "to bend"

from Online Etymology Dictionary by Douglas Harper
http://www.etymonline.com/

To Converge Or Not To Converge?

An Open Space event brings out divergent thinking -- and because participants jump from the cognitive to the intuitive, I call it emergent thinking. Each Open Space is designed with the client/sponsor and participants in mind. Do they need to converge thinking to identify key issues and priorities and/or work on action plans? Perhaps they do; perhaps they do not. Rather than automatically design convergence into your event, you may wish to think about what is essential for the time participants share together.

In some instances, highlighting key issues and forming action plans and work groups can come *after* the event in a way that is natural for the organization's system of communicating and meeting -- the event itself can close with participants reflecting upon the experience they shared - which is also a kind of convergence. At other times you may feel it is best to include some sort of convergence in the event itself.

In other situations, you may wish to design a closing activity that helps people reflect on their experience - another kind of convergence, but not one which prioritizes anything. And if you feel it may be useful to them you can design something that helps them identify a personal passion, issue or commitment that they would like to bring home into their own work and lives.

Or you may feel that the participants' and clients' goals will be best achieved by opening things up and expanding thoughts outward at the end of your event in sort of a "non-convergence" - a re-opening of space.

Usually the notes from their discussions throughout the previous day(s) are either posted on the walls throughout the event or presented to them in a Book of Proceedings on the last day (or both). Depending on the amount of session notes, participants can be given from 30 minutes to 1.5 hours to review the notes before they are asked to converge.

If you do decide that highlighting or prioritizing key issues is important for the design of your event, there are various ways to accomplish it. The following are different facilitators' approaches and their thoughts on convergence -- or non-convergence…

One important note: As you can read below many of us use different convergence and closing approaches to fit different organizations, organizational or community cultures -- and depending on what best serves the individuals and the collective group for its work after the Open Space event. Most of the facilitators who share their approaches below indeed use several convergence or non-convergence methods - not just the ones that they have written about here. As a community of practitioners we share and learn different tools from each other and put them to use as may best fit each situation.

To further inform your design regarding convergence, see also the paper Convergence: A Conversation, which illustrates different facilitators' experiences, choices and reasons for preferences of one method over the other when deciding to include convergence and / or action planning.

The approaches people use for convergence generally fit into 3 categories:

- **Voting and prioritizing**
  Using marks or adhesive dots or voting software to highlight a few "hot" items out of the many that emerged in discussions – to give a "snapshot" of what are the emerging issues, for shifting into action planning or for reflection on what the group as a whole can or should focus on for its next steps

- **Synthesis**
  A variety of methods to help a group see a common and often new pattern for action or reflection

- **Re-opening space (also known as 'non-convergence')**
  An invitation to take responsibility for what you care about and work with those interested in joining you

This paper will also include facilitators' further thoughts on action planning approaches and on closure after convergence.

Voting and Prioritizing

I like to invite people as they read the discussion reports or reflect on the day to identify what they feel "with passion" are the top 3 or 5 top issues for themselves and the organization. A quick way of getting that picture is the old sticky dot or check mark on the topic issues on the wall. If new issues or different formulation of issues need to be added, participants post themes to the wall at that time.

There is rarely a bottleneck of people voting at the wall since everyone does it at their own rhythm during the reading period. Then a quick glance usually tells you what the top

ones are and if desired, a quick count of dots on those gives you more precisely their hierarchy of importance.

Then, to action plan on collective issues and on people's personal passion … people can regroup under the top 5 - or more - issues or any other if they care to, so they can note related issues, share their thoughts on next steps, and communicate their individual commitments. Consistent with OS principles, people can go to more than one issue group if they so wish.

I always enjoy exchanges on convergence because I always discover new options on how to converge while being flexible with the group's energy and needs.

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Synthesis: Another Way of Seeing Patterns

Before I took the leap into doing convergence by re-opening the space, I experimented with synthesis. Here one version of the process I use.

I.   Brief discussion of synthesis
    A. Define: when we have looked at the parts of something and put them back together in a different way -- this leads to thinking about something differently.
    B. When we think about things differently, it leads to different actions, which lead to different results.
    C. We've all been trained in analysis -- breaking things into their component parts. Through reflecting collectively on what is most important to us personally, synthesis leads us to focus on what is most important to us as a community.
    D. Human beings have a marvelous capacity for synthesis. We are actually using our intuition. This is an alternative to setting priorities from a list. It keeps the results much more personal for us as individuals and as a community.

II. Restate the theme

III.   Reading and reflection time with proceedings
    A. Ask people to think about the following question as they read and reflect: In light of what they've read and experienced, how do they personally want to use their time and energy to actualize what they want?
    B. Depending on size of proceedings, plan for 30 - 60 minutes
    C. Encourage them to do some writing if they are so inclined

IV.   If the group is more than about 40, ask people to self select into groups of about 6-8 people
    A. Discuss their answers to the above question with each other; listen for common threads
    B. Write down no more than three themes (one per sheet); less is more -- so if they come to just one, that's just fine
    C. Allow for a wild card. Innovation begins at the margins. Open Space works in part because it allows for all voices to be heard. If someone has something that they have a burning desire to select but no support, they can post it as a "wild card."
    D. Plan about 45 minutes.

V.   Bring the groups back together to share their chosen themes
    A. Have them post the themes on a wall
    B. If someone has already posted something similar, then put them together.
    C. Discuss any observations, implications, reflections on what's on the wall
    D. Convene into planning groups around the topics now on the wall, and document, as with any OS breakout session.

VI.   Do closing circle
    A. Most important insight, idea they are taking from the conference (what the conference has meant to them)
    B. Any commitments they want to make
    C. Any feedback on the conference itself

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I had the wonderful opportunity of co-facilitating the Open Space meeting with Kay Vogt. Kay, having done many OS gatherings before, provided a terrific model, and what happened with the group was phenomenal, making me a real believer in the power of OS. So here I am, thanks to Kay and to that experience!

Kay, evidently like many OS practitioners, isn't fond of the "prioritize and vote for 10 topics" way of converging, and suggested we do something different. Fortunately for us,

it wasn't expected that the group would emerge with action plans, but it was important that we provide a meaningful closure and synthesis.

Kay was intrigued with how, at a corporate retreat I'd led a few weeks before, I had used skits instead of reports, as a way of bringing to life the initiatives that emerged. She wondered if we might do something similar with this group.

Late afternoon of the first day, after the OS sessions had completed and reports had been entered on the computers, we gathered the whole group together. Using a silent "affinity" process (all 25 topics on the wall on post-its, the group forms around and begins to move the post-its until they form into distinct groups - an amazing process, and fun to watch!), they generated four groupings.

Then, we had them self-select into four sub-groups to do the presenting, each group retreating to one of the break-out rooms, using the last hour of the Open Space day to prepare for the next morning's presentation. Not all 90 participated in creating presentations (which was OK, of course), and each group had 8-12 people presenting.

Their instructions (as summarized on a flip-chart that afternoon) for the skits were:

- 7 MINUTES TOTAL (we were going to be short of time, having been told by the conference coordinator that our two hour closing for Open Space the next day was cut to 45 minutes(!!). We told the presenters that the entire group would break out into wild and appreciative applause at exactly 7 minutes, no matter where they were in the presentation, even if they were mid-sentence. They received this news with enthusiasm and it only increased the excitement and challenge.)

- CONVEY: essence, meaning, feeling, direction, impact,...

- BE CREATIVE (around this bullet, in different colors was: "dramatic", "theater", "TV or game show", "action", "mime", "voice/music", "role-play", "mime", "news cast", "body movement")

- INVOLVE as many people as possible

- Have FUN! Be OUTRAGEOUS!

- NO talking heads (i.e., nobody reading listed items or a summary for the group)

It was incredible! There were four presentations, each of them were done without energy-draining introductions (e.g., "this is what we decided to do, blah, blah, blah"), and one was done completely in mime. Even with no, or very few, introductory words, it was powerfully clear what the essence of each was. One group, without asking or even

gesturing to invite the larger group (simply by modeling it themselves at the end of their 7 minutes), had all 90 people standing, singing, moving, and clapping along with them with revival energy and spirit. All four presentations were electrifying.

After the presentations, in the final closure, we asked all 90 participants to think of a single word that would describe their experience, and then for them to stand, one by one, saying that word aloud, until all 90 were standing. After all were standing, they were to come to the middle of the circle and take one of the 90 sets of proceedings that were stacked there, and that would end the session. They popped up randomly and with great energy, it was like a popcorn-Spartacus happening!

There was great excitement and energy that morning, and they made memorable, moving, and creative presentations whose life, meaning, and healing will live with the group (and me) for a very long time.

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Re-Opening the Space (also known as "non-convergence")

I'm thinking of this as follows:

> 1. Opening and then sessions.

> 2. Objective review by individuals (book, gallery, preferably not 'report-
>   outs').

This is what we already do. We tell the story of what's just happened. We make posters and stroll through the gallery. We pass out copies of 'the book.' Our participants mill around, asking clarifying questions, saying good morning, and beginning to sift out what's most important for themselves and the colleagues (old and new) who they expect to work with on issues raised.

> 3. Reflective review by community (closing circle sort of thing)

This too, is familiar enough... it's the closing circle. And, yes, I know I didn't say anything about voting yet. This little plan is beyond voting, though you might still toss it in. The idea here, though, is that after the NEWS is out, we invite participants back to the now... as everyone is wondering if any good will *really* come of this event. And

so, it's the closing circle... it's 'How do you feel now?' It's 'What has this time meant to you?' 'What is new and different?'

> 4. 'Now what do we do?' re-opening … The facilitator simply asks the new question: 'What do we do now?' and invites the community to post their answers.

It's the re-opening of the space... for action. It's the posting of sessions that can meet sometime in the next X-Y weeks or months, or perhaps will be convened online in addition or instead. This is where you might choose to vote anyway, but where my preference in future events will be to let the computing of importance be done inside the hearts of those in the circle, having heard the news, noticed the now, and finally looking ahead to next incarnations of these sessions. They can be combined as those most passionate and responsible see fit, and they can be as numerous as the passion of the people will support. There are no losing issues. Things that were finished can slide off the table gracefully. Things that are not finished can be restarted in true open space style. Depending on the setting, this may require some extra work on clarifying 'givens'.

Note: I like to think of these next postings as meetings that are being scheduled for the next days, weeks or months, rather than sessions scheduled for next hour. That leaves the next hour to plan for the next meeting... but I suppose it's all the same at this point and/or would depend on size of group and how long the whole event was.

> 5. Then we take another session to work out as much as we can on each of the new issues posted... what needs doing by next meeting, when next meeting is, who should be invited, how documented, etc... all the usual plan/do things.

First, nuts and bolts. Immediate next steps. The stuff that must be done between now and the next meeting(s) just scheduled in the re-opening.   Second, when appropriate, is which other nuts need to be invited into the craziness of this meeting we've been running in open space for the last two days. This is where we turn everybody loose for another 1-1.5 or whatever hours, normally after voting or clustering or otherwise crunching our news document(s) into next nutty steps. The focus of this session is still immediate next steps, what needs to happen before the next meeting, with a couple of key differences. The meeting was convened in Open Space, the day 3 morning agenda can be proposed as the agenda for those next meetings (see below), and then the working sessions we have can focus more clearly on the work of preparation, invitation, invitation list, logistics, research and documentation for those next meetings. In other words, these sessions can be explicit planning meetings for the next round of OS meetings.

> 6. Again, depending on the size of the group and space, could come back together again to review, reflect.

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When I started to think about better ways of setting priorities, I found myself guided by two underlying ideas.

 The first: when people listen to their own internal dialogue, they have a remarkable capacity to synthesize vast amounts of information and feelings. As a matter of fact, I believe that the act of looking inside or using intuition is an act of connecting with spirit.

The second: the personal is universal.

So, armed with these thoughts, I started experimenting with re-opening space for convergence. What changed is the sort of question I use when re-opening the space. Rather than an expansive question, I ask a very personal, reflective question: "Based upon your view of all of the possibilities discussed and explored, how do you personally want to use your energy, your two feet to further what's happened?" I let them know that if someone posts something similar, to work with them. So, rather than encouraging divergence, at this stage, I ask people to look for common threads.

What I find happens is people come forward with practical ways to live out what they have been discussing. Usually, relatively few items come up. Yet, what surfaces are consistently areas with universal appeal. It seems that when people focus on the personal what generally comes out are a handful of items that resonate with others. I think this is the essential magic of emergence. Of course, like any open space, there's also room for the action that's out in the margin.

During the 1997 Toronto Open Space on Open Space, we had a discussion on "Day 3" a short-hand name for converging after an OS. Someone had a wonderful quote:

"When we dream alone, it is only a dream
When we dream together, it's the begining of reality."

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More on Action Planning

How important is it for action groups to report back to the circle? What are the pros and cons of such reporting compared to simply a Talking Circle closing?

I had a couple of less than thrilling experiences with the report back process I was using (the group standing in front of the circle, reading out their report, and then answering questions) and came up with another way that seemed much more productive.

Basically, after finishing their action plans, the champions put them up on the wall around the circle. They are then free to either look around at the other Action Plans, or better yet, bumblebee their way into another group or two.

Before we do the closing circle we ask each of the champions to stand next to the action plan of their group with a marker pen. Others mill about and ask questions, make suggestions, offer support, etc. This goes on for as long as it takes, but so far it has always taken a little less than half an hour. Once that process is finished the Champions come one by one and place their plan in the center of the circle, and those that have been or are willing to be a part of the process to ensure this plans success are invited to stand.

Once all of the plans are in the middle of the circle, we begin the closing circle.

This has worked well when we have a good half day for Action Planning.

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After Convergence: Celebration

The first time I "Opened Space" we had two "endings."

The first was in the room, and the second was at the restaurant that night.

We were staying at the Ritz Carlton in Maui, and had one last night together after the program ended.

The "first" closing touched me deeply. I had been preparing for this meeting for a couple of months (including a quick trip to Toronto to have an intimate little training with Birgitt and two others). I had just been put in charge of running meetings within our company, and this was the "biggest" meeting I had done, with the CEO, President and others from the five different countries we do business in. In some ways, I had wagered my future on Open Space working (much because of the postings I had read on this list serve) and had never really been through an OS event. The group had started with much

conflict and tension, and the faces that greeted me on the first day were skeptical, and weary...weather torn comes to mind, though they all work indoors.

The final day there was a lightness to the group, and in particular to a couple of the people that had impressed me as "complainers" at first. The CEO had been diagnosed with cancer about a year and a half prior to this meeting. As our closing circle merged to a small standing circle of people holding and supporting each other (we don't use words like "group hug" in our company) the CEO said, "I have grown to realize that every day I have on this earth is a gift, and today seeing you all working together in harmony has made today one of the greatest of my life."

Then the "second" closing happened that night. We had the entire restaurant to ourselves, and ended up staying past closing (the Ritz just put a guy in the corner to watch us and make sure we didn't break anything, and closed the place down).

We ended up making a circle, randomly grabbed two other people's hand, and made a human pretzel. The goal was to "un-pretzel" ourselves without letting go. After about 15 minutes that staff from the Ritz came over and started to give us suggestions. In the end we had to "cheat" a couple of times and ended up in a circle of hand holding, giggling, smirking adults.

As we left, we thought, "Should we give this guy a tip?" Instead, we sang the "Thank You Song" from our children's product. It literally brought a tear to the guy's eye.

Now when I do programs with people that work in our children's division, we often close with the Thank You song, with them inserting people's names as they look at their eyes...

For those that are interested, here are the lyrics:

"T-H-A-N-K-Y-O-U
Are the letters that spell Thank You

T-H-A-N-K-Y-O-U
Spell the magic word that I sing to you

Thank you mother (replaced with someone's name from the group)
Thank you father
Thank you mother
Thank you very much.

Thank you mother
Thank you father
Thank you mother
Thank you very much."

With respect from Afar,

Jimbo Clark
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Compiled by Lisa Heft

Where did I hear all these reports?
Most of them came from individual facilitators sharing stories of
Open Space events on OSLIST, the electronic conversation of the
global Open Space learning community of Open Space facilitators and enthusiasts.
You can join this list and/or look through its archives, at:
http://listserv.boisestate.edu/archives/oslist.html

*A complete description of the method and the theory behind it can be found by reading
Harrison Owen's book,
"Open Space Technology: A User's Guide" -- Berrett-Koehler, publishers, San
Francisco.
This book can be ordered through the Open Space Institute of the USA at a slight
discount off the retail price.
Contact them at:
http://www.openspaceworld.org/wiki/wiki/wiki.cgi?OpenSpaceBooksAndVideos

For more information on Open Space
take a look around this website: www.openingspace.net
or contact any of the facilitators in this article.

Stories
Open Space at Work: Designing an Olympic Pavilion in Record Time
Harrison Owen

AT&T had an interesting problem. The design team they had assembled to create their pavilion for the '96 Olympics had lived up to all expectations. The design, in fact, was so good that AT&T was invited to move its pavilion from the edge of the Olympic Village to dead center. Since exposure was the name of the game, and $200,000,000 was riding on the project, making the move was an easy decision. There was, however one small problem. At the edge of the Global Village, 5000 visitors per day could be expected. At the center that number moved up dramatically: 75,000 people at the gate. Talk about exposure, but clearly a structure designed for 5000 would not accommodate 75,000. To make matters worse, the original design had taken 10 months to complete, and it was now December with the Olympics a bare six months away.

The 23 member design team was a dispirited group when they assembled to meet the challenge. They knew they were good, and given the time, could easily rise to the occasion. But the time was not there. As they sat in a circle, preparing to engage in what they perceived to be a very doubtful enterprise called Open Space Technology, one of their number was heard to comment, "I think we are about ready to turn a disaster into a catastrophe."

Two days later, the atmosphere was rather different. A totally new design had been created down to the level of working drawings, and everybody agreed that aesthetically it was much better than the earlier one. In terms of implementation, they were actually further along with the new design than they had been with the old one, for as they planned they were also ordering up materials for delivery. Perhaps most importantly, everybody was still talking to each other, and some even described the undertaking as "fun," complaining only that they should have used Open Space the first time.

This story is from the Open Space Technology chapter of <u>The Change Handbook: Group Methods for Shaping the Future</u> Peggy Holman and Tom Devane, editors, San Francisco, Berrett-Koehler Publishers, 1999.

Stories
Washington State Arts Commission's Strategic Plan:
A Conversation about the Arts

The Governor's Call for Action

In 1997, recognizing the value of arts to citizens, tourism, business, education and communities, Governor Gary Locke launched an initiative to strengthen arts funding in Washington State. He appointed a Blue Ribbon Arts Task Force to review State support of the arts and recommend ways "to ensure that our cultural life remains strong."

…After a one-year review Governor Locke's Arts Task Force called for strengthening WSAC's role and developing a "thoughtful plan for increased funding."

With strong statewide support for those recommendations, the 1999 Legislature approved a $750,000 increase to WSAC's budget – the first budget increase the agency had received in a decade. The funding increase came with the requirement that WSAC submit a strategic plan to Governor Locke and key State leaders by June 30, 2000. This plan is the result of that charge, and the outcome of a planning process that stretched across the state.

Planning on the Arts: Voices of the People

From the early states of this planning process, WSAC envisioned a *statewide conversation about the arts* that would strengthen the State's arts resources and expand the impact and effectiveness of the arts for all residents of the state.   Through two statewide meetings, 18 community meetings, several meetings of the Washington State Arts Commission, an online forum and a dedicated phone line, WSAC recorded the views, concerns, ideas and dreams from people across the State. More than 1000 people have been involved directly in the development of this plan; their testimony, stories, deliberation and reflection are the foundation for this strategic plan.

In the statewide and community meetings, the format used was Open Space Technology, a process to enable large groups of people to explore complex issues. Participants at each session recorded the discussion in a summary format that could be understood readily by someone who wasn't there. True to the spirit of Open Space Technology, the discussions were driven by passion for the arts and responsibility for the issues and opportunities faced individually and collectively.

Excerpt from "Planning On The Arts: Washington State Arts Commission's Strategic Plan"

Reflections on the process

When WSAC first contacted me, their biggest concern with an open, "conversational" meeting format was that community divisions would drown out any possibility of a cohesive plan. East vs. west, big organization vs. small organization, rural vs. urban; participants would focus on their own agenda and fight over a small financial pie. In fact, just the opposite happened. People came together and focused on their common hopes and aspirations for strengthening the arts throughout the state. The plan became an occasion for an unprecedented commitment to inclusion of many perspectives. As a result, when sent out for comment, the plan was enthusiastically received; everyone found their voice reflected. Ironically, the fear of conflict was released so completely, that the significance of its absence was barely noted.

Behind the scenes: Supporting the meetings

To support the 20+ meetings held by WSAC, a call was issued for skilled Open Space practitioners in Washington State. More than 20 people agreed to participate. They were convened for a train-the-trainer session that introduced them to WSAC, the process, engaged them in finalizing the meeting design, and provided them the logistical information they needed.

Meetings ranged in size from 5 to 100. Depending on the anticipated size, some practitioners worked in pairs, others alone. They took their work seriously – every commitment to participate was honored by these practitioners. In addition, at the train-the-trainer, we agreed to share experiences via e-mail as the events took place. The unanticipated result was a rich conversation among practitioners that enabled each meeting to build on the learnings from the ones that came before.

Resources

www.openspaceworld.org
The unofficial home of the Open Space community world wide.

Open Space Listserv
Online Open Space community email list and library for stories, learning, and friendly global support, 24 hours a day, 7 days a week. OSLIST archived since 1996. To subscribe, visit http://listserv.boisestate.edu/archives/oslist.html.

Web sites of respected Open Space Practitioners
A characteristic of the Open Space community is a spirit of generosity. There are many, many valuable Open Space resources on these sites.

- Chris Corrigan   www.chriscorrigan.com
- Lisa Heft   www.openingspace.net
- Michael Herman   www.michaelherman.com
- Peggy Holman   www.opencirclecompany.com
- Harrison Owen   www.openspaceworld.com
- Michael M Pannwitz   www.michaelmpannwitz.de
- Larry Peterson   www.spiritedorg.com

Open Space World Map
www.openspaceworldmap.org
See where Open Space has been used, find a practitioner in different parts of the world

Bibliography

Owen, Harrison, **Open Space Technology: A User's Guide** - All you ever wanted to know about facilitating an Open Space event. Included are the specifics about time, place, logistics, invitation and follow-up. Special attention is devoted to the preparation of the facilitator. (Berrett-Koehler, 1997), paperback, 200 pages.

_____, **Expanding Our Now: The Story of Open Space** - OST creator Owen offers numerous examples to illustrate the evolution of OST. He explores what it is, how it developed and how and why it works all over the world, for groups of all sizes dealing with a vast range of issues. Owen shows how OST can move organizations to higher levels of performance, without elaborate training or professional facilitators. (Berrett-Koehler, 1997), 200 pages.

_____, **The Spirit of Leadership: Liberating the Leader in Each of Us** - Everybody says there is a crisis in leadership. Some would even say that all the leaders have gone. Actually, there is plenty of leadership and it resides in all of us. When nobody is in control we all are. The Spirit of Leadership describes, in very practical terms, the rights, duties, obligations, and opportunities of the new leadership, which is us. (Berrett-Koehler, 1999), paperback, 180 pages.

_____, **The Power of Spirit: How Organizations Transform** - Harrison Owen offers his reflections that real transformation does not result from corporate mandate but from the expression of the spirit and passion of the people in the organization. He suggests ways to release this spirit and dissipate the "Soul Pollution"- apathy, stress, and exhaustion-that plagues today's workforce. (Berrett-Koehler, 2000), paperback, 260 pages.

_____, **The Practice of Peace, 2nd Edition** - Harrison Owen's latest book. Could it be that when Peace in our lives is threatened, a first and critical step might just be -- Open Space? Not just doing an Open Space Event, but also applying what might be called the open space principles in our broader activities? How and why could this possibly work? And what would we do anyhow? (Human Systems Dynamics Institute, 2004), paperback, 211 pages.

Holman, Peggy and Tom Devane, eds., **The Change Handbook: Group Methods for Shaping the Future** - the most comprehensive guide available to methods of organization and community change. It's designed for quick and easy access to information about high leverage change from today's foremost practitioners. (Berrett-Koehler, 1999), paperback, 400 pages.

Understanding Open Space: Stories by Harrison Owen, 5 audio CD set. Hear the thinking behind Open Space from its creator, Harrison Owen. This recording was made during the July, 1999 Open Space Technology Facilitation Workshop in Seattle, Washington. These stories, which Harrison tells when introducing Open Space to new facilitators, take OS out of the realm of better meetings and into a different way of being. (Open Space Institute (US), 1999)

U S WEST Open Space Video. This 16 minute video is a great tool for helping people get a picture of what an OS event looks like. It contains interviews of people before, throughout and after an OS event. Harrison Owen, originator of Open Space Technology, provides an explanation of Open Space principles woven throughout the video. (Open Space Institute (US), 1995, VHS, PAL, or DVD format)

Herman, Michael and Chris Corrigan, eds., **Open Space Technology: A Non-User's Guide.** Like Open Space itself, this community-authored companion to OST: A User's Guide by Harrison Owen was discovered and compiled by Michael Herman and Chris Corrigan. Its 37 unwitting authors are a small slice of the hundreds whose email writing and community learning fills the OSLIST online archive, which itself holds but half of more than 10 years of dialogue. Which is to say that this is only the tiniest excerpt of what has been going on, around the world, online and elsewhere, for a very long time. (Online at http://www.globalchicago.net/wiki/wiki.cgi?OpenSpaceTech/UsersNonGuide, 2002.)