

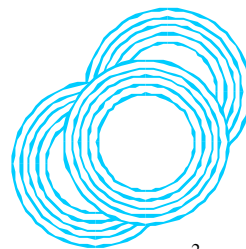
Open Space Technology



Basic Level Training

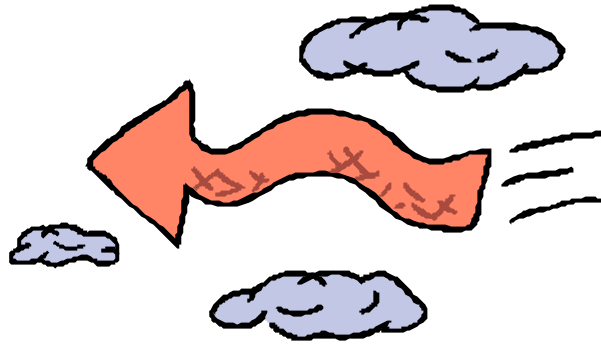
Course Outline

- Day 1
 - Background of Open Space Technology
 - Preparing for the meeting
 - Getting the meeting Started
- Day 2
 - During the meeting
 - Convergence
 - Closing the Space
 - Meeting Follow Up



2

Background of Open Space Technology



3

Coffee Breaks – Inspiration for a new Meeting Technology



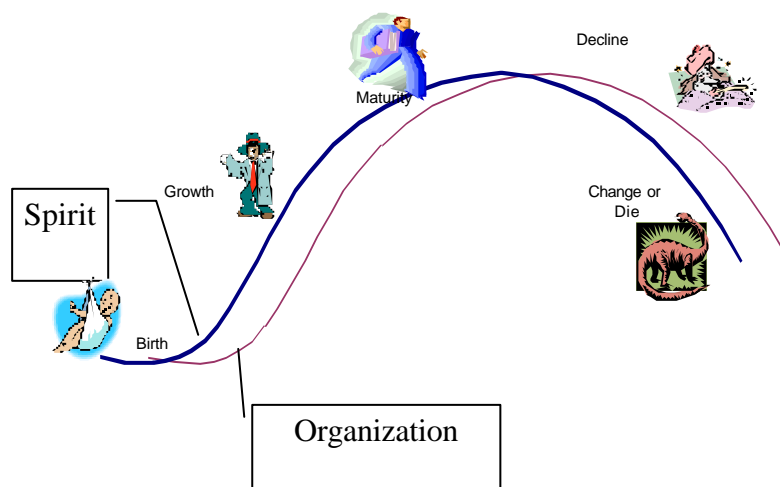
4

What OST Provides

- Cost efficient method for engaging medium to large sized groups in collective transformation.
- Unleashes pent up passion.
- Enough structure to release creativity and freedom.
- An opportunity for revival of organization's spirit

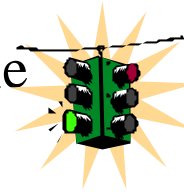
5

The Spirit/Organization Life-Cycle



6

When Open Space is Suitable



- Open Space Technology is appropriate where a diverse group of people must deal with complex and potentially conflicting material.
- Nobody knows the answer.
- Ongoing participation is required for success.
- Senior management wants to engage the whole system in finding the answer.
- Response time is “yesterday.”

7

When Open Space is NOT Suitable

- The answer is already known.
- Sponsors thinks they know the answer.
- Sponsors feels the need to be in charge and control, control, control.



8

The Role of the Facilitator in Open Space

- Work with Sponsors on creating Theme and Givens.
- Keep the space as “open” as possible.
- Stay out of the way of the participants.
- Focus the participants on the Theme.
- Follow up with Sponsors on results of the meeting.

9

Be Open to Outcome



10

Preparing the Event



11

Working with the Sponsor

- Determine if OS is really the best choice.
- Explain Open Space and ensure high level buy-in for this kind of meeting
- How much time
- Location and space
- How to invite attendees
- Theme
- Givens (assumptions)

12

Explaining Open Space

- Can't explain too much, as if you haven't experienced it, won't make sense.
- Go over the guidelines for appropriateness of OS, and make sure the sponsors agree this is the best way to go.
- Tell your experience in Open Space

13

Time Considerations



- Half day = quick brainstorming
- One Day = Deep discussion with some next steps
- Two Day = Deep exploration of the theme with some action plans and a full book of proceedings
- Two and a Half Day = Complete exploration of theme with action plans, book of proceedings and deeper buy in by participants.

14



Location and Space

- My preference is a BIG space with informal alternatives (lobby, out door space, etc.).
- Be careful when making reservations, if you say you are having a meeting for 30 people, the space will be too small.
30
- If possible, visit the space before hand.
 - Where will you put the Bulliten Board, Newsroom, etc.
 - Test the walls for tape
 - Prepare “all day” coffee breaks

15



Location and Space

- Copying Reports
 - 2 day meetings usually have a book of proceedings given out before convergence.
 - Need access to a high speed copy machine with sorting ability.
 - Hotel’s are extremely expensive, so if you use a hotel, make sure that you figure this into your budget.

16

Theme



- “For Open Space to work, it must focus on a real business issue that is of passionate concern to those who will be involved.”

Harrison Owen

- Short and to the point.
- Focus the group on the direction that they should be heading.
- Take your time on this...there is no going back.

17

One Way → Givens



- There are three main types of “Givens.”
 1. Fence Posts – boundaries that sponsors are not willing to discuss at this time.
 2. Sign Posts – areas that sponsors believe are of great importance for the participants to consider while discussing the theme.
 3. What Next? – What will be done with your work? How will proposals be approved?

18

Givens

- Should be expressed in the invitation.
- When determining the givens, try to talk the head of the organization.
- Be prepared to use other facilitative methods with sponsors when determining givens.
- Getting to the Givens is sometimes the most difficult task in Opening Space.

19

What are questions that would be good to help the sponsor develop
“The Givens?”

20

Inviting Attendees

- Open Space works best when the invitation is “open.”
- Our experience in our company has been that people don’t know how to handle an “open” invitation.
- Sample invitations in the Appendix
- Invitation should come from the Sponsor (with your help)

21

Preparing the Space



22

Before you Leave...

....

- Check the Open Space Equipment Checklist.
- Double confirm with the location for morning coffee breaks and room set up.
- Double confirm computers and printers.

23

Setting the Room

- Arrive at least one hour before the meeting.
- Chairs in a circle
- Air Conditioner is on.
- Put Theme and Givens on each chair.
- Check Microphones
- Make Posters
- Put A3 paper and plenty of markers in center of circle for creating the topics for the Community Bulletin Board.

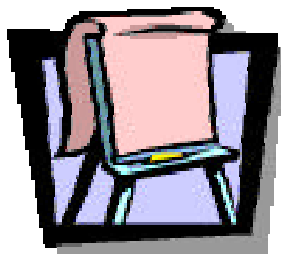
A3

24

Theme

- Make two to three posters with the Theme and place them prominently.

2 3



25



The Four Principles

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

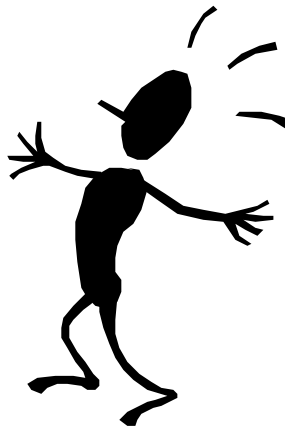
26

The Law of Two Feet



27

Be Prepared to be Surprised!



28

Sample Schedule Day 1

Day 1 Schedule	
9:00 – 10:00	Start and Agenda-Setting
10:00 – 11:15	Session 1
11:15 – 12:30	Session 2
12:30 – 1:30	Lunch
1:30 – 2:45	Session 3
2:45 – 4:00	Session 4
4:00 – 5:00	Evening News

31

Sample Schedule 1 ½ Hours

Day 1 Schedule	
9:00 – 10:30	Morning News
10:30 – 12:00	Session 1
12:00 – 1:30	Lunch
1:30 – 3:00	Session 2
3:00 – 4:30	Session 3
4:30 – 5:00	Evening News

32

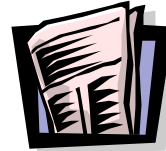
News Room

- One computer (with floppy drive) for every 8 to 10 people.
8 – 10
- One 6 foot table for every two computers.
- One floppy disk with a blank report labeled and saved as the topic number.
- One printer (with a printer switch).
- News Wall
- Print a test print.



33

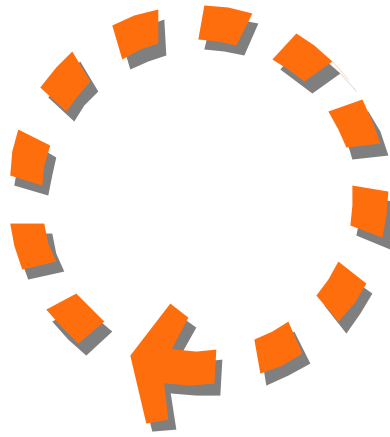
Report Sample



- Near the News Room create a sample report poster.
 - Topic
 - Topic Number
 - Initiator
 - Participants (including Bumble Bees and Butterflies)
 - Notes

34

Opening the Space



35

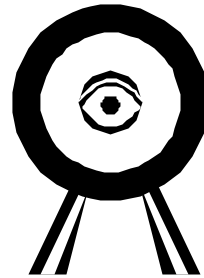
Welcome

- The first person to speak is the sponsor.
 - Welcome the group
 - Restate the Theme



36

Focus the Group



- Ringing Bells and Breathing
- Walk the circle and invite the participants to follow you and look at the other participants to see who is there.

37



Theme and Givens

One Way

- State the Theme
- Carry the importance of the theme to the group.
- Read through the givens with the group and give them some time to digest the meaning.

38

The Four Principles

- These guide our behavior in Open Space.
 - Whoever comes is the right people.
 - Whenever it starts is the right time.
 - Whatever happens is the only thing that could have.
 - When it's over, it's over.

39



Whoever Comes is the Right People

- This is very empowering.
- Give some time for people to look around the room at each other.
- We are the ones empowered to find the answer to our theme.
- It doesn't matter what level you are at, if you are here, you are the right person, and you can make a difference!

40

Whenever it Starts is the Right Time

- Usually we are already late. But it is the right time.
- You will find that the schedule (if there is one) is more of a recommendation than a schedule.
- If you are initiating a topic, you decide when it is right to begin that discussion.

41

Whatever Happens is the Only Thing that Could Have

- This is not to say that you have no control over what happens, quite the opposite.
- That which will happen in this meeting is the only thing that this group, in this space, at this time could do.
- This frees us from regrets...”I wish I had...”

...

....

42

When it's over, it's over.

- You'll know when you have completed talking about a topic.
- It might be “early” and it might be “late.”
- The important thing is for you to know that it is over.
- When it's not over, it's not over.

43



The Law of Two Feet (The Law of Mobility)

- You are responsible for how you use your time. If you are not contributing or learning in a group, you should use your two feet and move somewhere you can learn or contribute.
- If you are in a group, and your boss is talking, and you are not learning or contributing, you should obey the law!

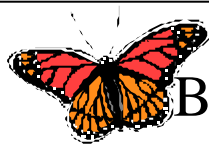
44

Bumble Bees



- In nature Bumble Bees go from flower to flower, pollinating flowers.
- In Open Space, Bumble Bees go from meeting to meeting.
- Important to pollinate our meeting with information from other groups.
- They are not being rude.

45



Butterflies



- Butterflies are harder to understand because they just fly around.
- Butterflies may spend a lot of time by the coffee table or the News Room.
- Sometimes butterflies are people who have “full brains.” Sometimes they are the “hosts” of Open Space.
- Butterflies are not being lazy.

46

Giraffes



- Giraffes have long necks and will look before they walk.
- In Open Space Giraffes are people who want to use their two feet, but are afraid of being seen as rude.
- We would like to suggest that you not be a giraffe in this meeting.

47

Open Space Runs on Passion and Responsibility

- Passion
 - Gets you here
 - Motivates you to propose a topic
 - Moves you through the process
- Responsibility
 - Gets things done
 - Moves things forward



48

Setting up the Community Bulletin Board

- If you have a topic that is vital to answering the theme, passion is what will get you out of your seat to put the topic on the wall.
- Remember, you are the “right” people.
- At the end of the day, there is no reason to say, “Why didn’t we talk about...” The things we talk about are based on your passion, and willingness to take responsibility.

...

49

This is
a sample
Jimbo

Propose a Sample Topic

- Write topic and name.
- Pick up microphone and state the topic and your name.
- Go to the Space/Time Matrix and put a post it on the paper.
- Hang the sample on the Community Bulletin Board.
- Return and think if there is another topic.

50

Responsibilities of the Initiator

- Start the meeting by taking the poster off the board, and announcing to everyone that this topic will start now, and the location.
- Ensure that everyone that comes has a chance to speak.
- Make sure that notes are taken and input into a computer (if using computers) by someone (not necessarily the initiator).

51

Explain Space/Time Matrix

- The number represents the session.
- The letter represents a “space.”
 - If you are using set break out rooms, the letter represents a room.
 - If you are not using break out rooms, the letter represents the space that you choose to hold the meeting, and is useful for report writing.

52

Invite Participants to Initiate Topics

- There should be plenty of A3 paper and markers on the floor in the center of the circle.
A3
- Give them plenty of time.
- Make sure there is always plenty of Open Space on the Space/Time Matrix (make more if you have to).
- Don't help TOO much. This is about empowering them to find their way.

53

FAQ's During Community Bulletin Board Creation

- There is another topic that looks the same, can we combine them?
 - Sometimes having two topics that look similar is desirable. While the topic may look the same, the view of the initiator may be different. Why don't we leave them both up there, and if later you feel that it has been talked about enough, we can take one of them down. Sometimes if a topic is proposed more than once it means it will need more time to discuss. If the topic is going to be combined, both initiators should agree.

54

FAQ's During Community Bulletin Board Creation

- I want to attend more than one topic during the session, can we move the cards?
 - We find that using the Law of Two Feet usually handles that problem. If you are initiating a topic and would like to change your topic to another session that is fine.

55

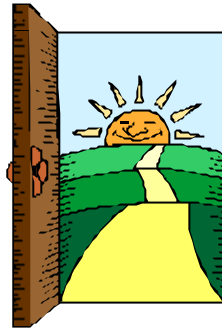
Set them Loose



- Make whatever logistical announcements you feel are necessary (lunch time, etc.).
...
- Invite the initiators of the first sessions topics to take their paper off the wall and move it to their space.
- Disappear.

56

Keeping the Space Open



57

Holding the Space

- Picking up coffee cups.
- Begin keying in reports.
- Read the newspaper.
- Take a nap.
- Working around the Newsroom.



58

Space Invaders



- People who feel uncomfortable enough with the process that they feel it necessary to control or alter it. People who start to make decisions for the group, “We need to do this...”

.....

59

Space Invaders



- Don't Panic!
- Acknowledge the validity of the idea and suggest they put a topic on the Community Bulletin Board, the others can follow the Law of Two Feet and attend or not.
- If they persist, it might be time for you to walk out of the room. Either the group will follow, or they won't. Either way, it is the group's decision.

60



News Room and News Wall

- As the meeting progresses, people should start coming to the News Room to type in their reports.
- Print out as completed and place on the News Wall.

61



Evening News

- If more than a one day event, at the end of the day participants return to the circle for “Evening News.”
- The microphone is placed in the center of the circle, and participants are encouraged to use this “talking stick” to express what they have experienced that day.
- If there is a time limit, make sure participants know.

62



Morning News

- At the beginning of the second or third day, the participants gather in a circle.
- Any changes to the schedule or other announcements are made.
- The microphone is placed in the center of the circle and the invitation is open for people to share what they would like to.
- Participants are offered another chance to add topics to the Community Bulletin Board.
- Initiators are invited to start the morning's topics.

63

Convergence



64

Convergence

- At the end of most Open Space Technology meetings some form of convergence will need to be done.
- This is particularly true in any meeting that is more than one day in length.

65

Convergence Sample

- Print out all reports.
- Enlarge to A3 and put two or three sets of the report on the wall.
A3
- Under one set, place an empty A4 paper under the report and write the number of that report on the paper.
A4
- Pass out stickers (4 to 8 per person).
4 8

66

Convergence Sample

- Present the reports to the group, and honor the hard work and wisdom that they represent.
- Ask people to wander the room, reading the reports.
- Of these topics, which ones are most vital to answering our Theme.
- Place your stickers on those topics you have passion for and you think are essential to move forward on.
- You have half an hour.

67

Convergence Sample

- Once the voting is finished, take one set of reports off the wall and the A4 with the stickers and place them in a circle in the middle of the room.

A4

- Those with more votes are areas that the group is suggesting that we focus our energy first. Other ideas are still possible, but these are the urgent important topics.

68

Convergence Sample

- Nothing happens without passion and responsibility. We are looking for people who have passion for this topic, and are willing to take the following responsibilities.
 - Convene the meeting.
 - Make sure that everyone has a chance to speak.
 - Fill out the action planning form.
 - Be the squeaky wheel going forward.

69

Convergence Sample

- Champions come forward, pick up a topic (and those that relate to it) and speak out to the group the area they will be convening.
- Remind that the “who” on the action plan form can only be people who are in the room and agree to the action. If the decision maker or “doer” is not in the room, then someone else needs to take responsibility for asking that person.
- Once all the topics that are going to be selected are picked up, groups convene and fill out their Action Plan Forms.

70

Convergence Sample

Topic Name		Champion
Participants		
Action	Who	When

71

Convergence Sample

- Participants return to the circle.
- Champions place their Action Plans on the wall and stand next to them.
- Others follow the Law of Two Feet looking at the Action Plans, making suggestions and offering support.

72

Closing Circle

- Ring the bells.
- Re-introduce the talking stick.
- This time, the stick will be passed around the circle and each person has a chance to speak (or not).
- If there is a time limitation, let the group be aware of this.



73



Final Book of Proceedings

- After the meeting is finished, the Action Plans need to be keyed in and all the reports put into one file.
- That file should be sent to the sponsor and all participants.
- Keep a file for yourself as two years later someone may come to you for it!

74

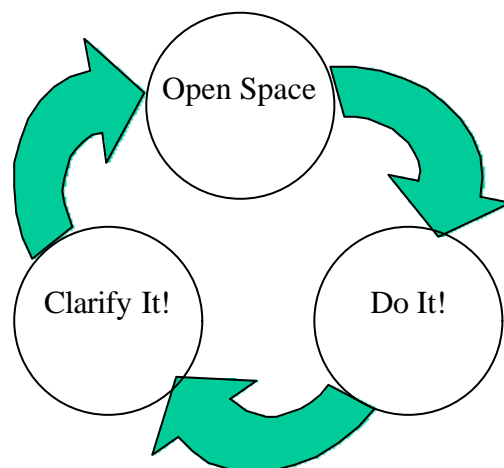


What to do Next?

- Meet with the Sponsors within one week to follow up on the meeting report.
- Usually you will want to have a follow up meeting in two to six months to check on progress.
 - If you use Open Space for the follow up meeting, start by passing out the last book of proceedings before putting up new topics.

75

Cycle of Change



76

Appendix

77

Key Questions or Perceptions in developing the Givens.

- 11) Is there anything that is non-negotiable (authority etc)?
- 22) What is off limits?
- 33) What is a waste of their time right now?
- 44) What recent decisions will affect the work of the group?
- 55) What is coming up that will make a difference/ people need to know?
- 66) What are parameters that need to be stated?
- 77) Any major events in the past 6 months or next six months?
- 88) What is now being done in this arena in the company?
- 99) What is your greatest anxiety that you would like to see addressed?
- 110) Is there information on competitors or the market that would be helpful?
- 111) Who is going to be invited? Who needs to be invited? What do they need to understand at the start?
- 12) What is the greatest anxiety that you do not want to see addressed?
- 113) What are the skeletons in the closet? What has been tried that failed?
- 114) If you are working with one department how can you protect yourself from the rest of the company? Do you need to guard yourself?
- 115) Anything else I should know?
- W16) Why did you call me?

Developed in the Open Space Basic Training held last year.

78

Open Space Equipment **Checklist:**

Things to bring:

PLENTY of Flipchart Paper (or A3 if the room is small)
PLENTY of marker pens (1 per expected participant)
PLENTY of tape (4 rolls per 50 expected participants)
Post-its (multi-colored)
Some Pens and Pencils (1 per expected participant)
Two reams of A4 paper (per 100 people, more if you are doing copying with own paper)
Handwritten Report Forms (1 per participant – per day)
Copies of Themes and Givens (1.1 per participant)
Bells
Talking Stick
Stickers for convergence (10 per participant)
Printer (1 per 100 people)
Extra Printer Cartridge
Ruler
2 pairs of scissors
extension cord (1 per computer)
Computers with floppy (one for 10 to 15 people)
*Digital Camera
*Digital Recorder
Floppy Disks (one per session)
Action Planning Forms (1 per participant)
Letters for break out areas (1 per break out)
Posters:
 The Law of Two Feet
 The Four Principles
 The Theme
 News Wall

The Night Before:

Create the Space/Time Matrix

Before Participants Arrive:

Make circle of chairs
 Flip Chart (or A3) in center of circle with markers
Put up posters
Set up Computers and Printers
Set up Break Out rooms:
 Label each room
 Paper
 Pens
 Chairs

79

For More Information

- www.openspacetechnology.com
- www.openspaceworld.org
- “Open Space Technology – A User’s Guide” by Harrison Owen

80