OPEN SPACE TECHNOLOGY

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Open Space Technology was developed in 1985 by Harrison Owen to address complex issues. Open Space is a democratic process for groups as small as five and as large as 2000. It engages all voices in an organization in one to three days. One day results in intense, worthwhile engagement. Two days produce a report of the proceedings. Three days generate an action plan.

Open Space will not work in organizations that assume elites at the top of the food chain know far more than the peasants. Senior management will be too threatened, while subordinates will not speak their minds. Open Space's strength is full enrollment in both process and results.

Like in a World Café, meeting room setup for an Open Space event is atypical. Upon arriving, participants see a room with one, two, or three large circles of chairs. Various signs are posted on the walls; including a schedule, the principles of Open Space, and a strategic question to be addressed. The most disconcerting feature is that there is no agenda. That will come later.

Participants fashion the agenda during the event. Every agenda item in the minds of the participants related to the strategic question is fair game. The more ideas and greater diversity, the better. The second essential ingredient is that everyone needs to care. People who don't care should stay home. Everyone should have a stake in the future of the group. Participants need passion and a willingness to take responsibility. Because participants shape the agenda, energy and engagement replace low ownership.

An Open Space event begins with a simple invitation. While most meeting invitations include an agenda, Open Space Technology does not. The group prepares the agenda at the beginning of the meeting. Open Space invitations convey the usual items about location, times, and food arrangements. As far as the meeting contents go, they say something like the following: "We will discuss the question [fill in with an innovative, challenging question]. Every issue important to you and the [organization] will be explored. All voices will be heard. We will be energized. Priorities will be set. A full report will be issued. If you bring passion to [organization] and a profound sense of responsibility, we need you to attend. Everyone else stay home."

The room layout must permit one, two or three concentric circles of chairs (depending on the number of participants), plus breakout space for small groups. The circle must be large and open—hence the name "Open Space." Breakout spaces can be in the same room, nearby in separate rooms or some combination. The definition of room is flexible. Breakout spaces could be outside in a park, alongside a swimming pool in a hotel, or in a coffee bar. You will need five to six breakout spaces for every one hundred participants. A long blank wall adjacent to the large circle suitable for affixing signs and agendas completes the picture. A bank of computers and printers can be made available at one end of the room if you decide to record proceedings and generate reports in real time.

Meeting planners need to figure out meals, refreshments, and breaks. Supplies include nametags, masking or artist's tape, brightly colored markers, flip charts, and lots of large post-it notes. If the group numbers more than 7seventy-five a microphone and speakers will help.

The role of the facilitator is to create a welcoming, open space. She or he should arrive early, make sure everything is set, supplies available, signs posted, and refreshments set out. Then relax. There should be no rushing around when participants arrive.

Next, prepare and post signs. These provide the minimal structure of Open Space Technology. They include:

- Theme, Behavior, and Expectations

- Daily Schedule and Space/Time Matrix for the Wall

- Report Production

One sign gives the theme of the event. Carefully frame the purpose of the event in a question with as few words as possible. It must reflect a central issue or aspiration of the group. Generic questions will not work. The question must be specific and evoke deep passion and thought.

- How shall we embrace technological change with seniors?

- How shall we become the safest work site in our company?

- How shall we eliminate homelessness in three years?

- How shall we erase the tragedy of gun violence from our nation?

Questions must be big and bold. Your group must not already know the answer. Easy questions with easy answers are out. Evocative, inspiring, open-ended questions that elicit new thought and intense conversation are what you want.

Three additional signs are required. One sign lists the following four guidelines:

- Whoever comes is the right people.

- Whatever happens is the only thing that could happen.

- Whenever it starts is the right time.

- When it's over, it's over.

The second sign says:

- Be Prepared to Be Surprised.

The third sign says:

- The Law of Two Feet – If, during the gathering, people discover they are neither learning nor contributing, they must use their feet and go to a more productive place.

Post a large sheet of paper with a time/space matrix. The time/space matrix specifies times across the top row. The left column lists meeting locations.

The blank wall is used to post topics. This wall becomes the agenda. The meeting starts with nothing on the wall with one exception: a barebones meeting schedule. The schedule provides starting and ending times, lunch, and the times for 90-minute sessions spread over one, two, or three days.

For detailed instructions for room setup and meeting preparations, consult chapters 5 and 6 of Harrison Owens book, *Open Space Technology: A User's Guide*.

Here's how it works.

The circle or circles are set. The space in the middle is open, save for a collection of brightly colored markers, tape, and lots of sheets of small flip chart paper. The task for the first 90 minutes, no more, is to set the stage, focus the group, state the theme, and describe the process.

Open Space Technology meetings launch with a brief welcome. "Good morning, I'm glad you are here. You've all read the invitation and know why we are here." Then the leader restates the question that will drive the Open Space meeting. Something like, "We are here to explore the question, 'How might we make a difference in stopping gun violence?'" or "Our driving question today is 'How shall we strengthen our commitment to equity and inclusion?'"

Next, the leader welcomes the facilitator. Be brief. "It's my pleasure to welcome Mark Smutny, our facilitator. He is an author, professional facilitator, owner of Civic Reinventions, and today's host. Let's welcome Mark."

The facilitator takes the floor. "Good morning. I'm Mark. Welcome to our Open Space. Today we are in for an exciting, productive day. Let's begin." Keep it brief. No flourishes or speeches. No icebreakers or the like.

After the welcome, invite the group to look around and see who is present. As the facilitator, your calm presence is essential for this step. Inviting people to look at each other in these opening moments is a way to create safe, inviting space. Quiet respect is the goal.

Next, restate the central question of the meeting. They've heard it before but say it in a way that brings focus. "We are here today, tomorrow, and the next day to generate a detailed report highlighting the steps and resources needed to change our neighborhood from a high crime, low investment disaster into an economically-thriving and culturally-diverse engine of commerce, culture, and community. By closing time on Wednesday, we will have produced a detailed work plan."

Avoid long speeches and cute icebreakers. Skip last year's strategic planning results. Forget naming the longest serving employees and giving them plaques and gift cards. Cut to the chase.

Review the signs on the walls. Read each one out loud. Stay upbeat. Convey a can-do attitude and a spirit of optimism.

Next, describe the process. Mention that Open Space Technology has been around since the 1980s and has been used all over the world. Paint a picture of an Open Space event. "Imagine two hundred people gathered in one room, self-organizing a conference with forty breakout groups spread over a two-day period, with a complete, one hundred page report detailing goals and objectives for the next two years. Amazing!"

Then say, "This is how it works." Quote from Harrison Owen's *Open Space Technology: A User's Guide,*

You may be wondering how we are going to do all this. It's quite simple. In just a little while, I am going to ask each of you who cares—and nobody has to—to identify some issue or opportunity related to our theme for which you have genuine passion and for which you will take real responsibility. Don't just consider good ideas that somebody else might do or be interested in. Think of powerful ideas that will really grab you to the point that you will take personal responsibility to make sure that something gets done.

If nothing occurs to you, that is okay, and if you have more than one issue or opportunity, that is fine too. Once you have your issue or opportunity in mind, come out into the center of the circle, grab a piece of paper and a marker. If you have more than one issue, take several pieces of paper. Write down a short title and sign your name. Then stand up in front of the group and say, "My issue is . . . and my name is. . . ." After you have announced your theme, take your piece of paper and tape it up on the blank wall (pg 88).

Two points need to be underscored. First, to come forward with an idea requires passion. Secondly, coming forward means you are willing to take responsibility. These twin needs enable people to come forward and then facilitate the next step.

As a skilled facilitator, you know some anxiety is good. Anxiety can improve learning and increase engagement. Capture that anxiety by saying something such as "Never been in a meeting where the agenda is a blank wall? Guess what? In one hour, you're all going to be saying, 'How will we possibly get through this entire agenda in only a day (or two or three days)?'"

The task of describing the process continues. The facilitator explains that taking responsibility means the proposer must name a time and place to meet and then convene the session. She or he must also be willing to record the proceedings on a computer. The convener also places a post-it on the time/space matrix, indicating the theme, time, and location for the meetup.

The final step before releasing people to the meetups is to review the four principles and one law. These outline the way things work in Open Space.

The first is *"Whoever comes are the right people."* In other words, if two people show up with a similar passion, that's enough.

The second principle is *"Whatever happens is the only thing that could happen."* Real learning and growth occur when diverse perspectives are shared. Greater truth and insights emerge.

The third principle is *"Whenever it starts is the right time."* When conversations get rolling, some people jump immediately to the question at hand. Others want to chat informally. Some want to share pictures of their dog, cat or child. Creativity in groups emerges through trust. My advice for the "do everything on time" participants is to remind them to breathe deeply and go with the flow.

The final principle is *"When it's over, it's over."* If the group fashions its ideas in the space of thirty minutes when the schedule says you are allotted ninety, quit when you are finished. Go somewhere else. Open Space Technology encourages flexibility. Do not waste time in a meeting that is finished by trying to figure out something else to discuss.

The one law states, *"If, during the gathering, people discover they are neither learning nor contributing, they must use their feet and go to a more productive place."* This law is a great leveler: If one person is in love with his or her voice and dominates air time, other people have permission to leave. They walk away. There is nothing like walking away to convey that a different, more respectful behavior is required. So, if the discussion becomes boring or you discover your deepest passion lies in another group, take a walk.

The facilitator needs to remind people of one last item: *"Be Prepared to Be Surprised."* The wonder of Open Space Technology, like all whole group planning methods, is that the process of creative conversations uncovers new knowledge. Greater wisdom emerges. Reminding participants to anticipate surprise prepares them for wonder and yet unimagined results.

Now, launch. Press the button and let the rocket take off. Say something like, "Now, I invite everyone who has a deep passion for an idea and is willing to take responsibility for convening a group to come forward. Grab a post-it and a marker. Record your idea. Place it on the space/time matrix and announce your topic. Say, "My issue is . . . my name is . . . "

A ten-minute circus breaks out with people posting issues. It is likely the group will generate more topics than you have slots available. Group similar items together. Once the space/time matrix is finished, invite participants to look at it, ponder their interests, and work out what group they will attend for the first round. Hit a bell and announce the convening of the first session.

The rest of the day organizes itself. Each break-out space needs flip-chart paper and markers. At the end of each ninety-minute session, ring a bell to let people know it is finished. Collect the note-filled sheets. Put them on the blank wall. Encourage conveners to type their flipchart results.

Tell people when each session starts and remind them about the *Law of Two Feet.* With these parameters, the event will basically run itself. Whether you have a one-, two-, or three-day event, make sure each day has thirty to forty minutes near the end for the whole group to reflect on the day. The focus should not be on the substance of the issues, but on the process. Ask, "What went well today? What do you suggest we improve?"

Once people get rolling, Open Space is easy to facilitate. I guarantee your organization will discover great energy and focus on an issue central to your group.

Appreciative Inquiry, World Café, and Open Space Technology are but a few of the large group planning methods that now breed like flies. Future Search, Process Mapping, and Planning Charrettes are a few of the other most commonly used methods. Each has its benefits. Each seeks in various ways to engage all parties and embrace diverse perspectives.