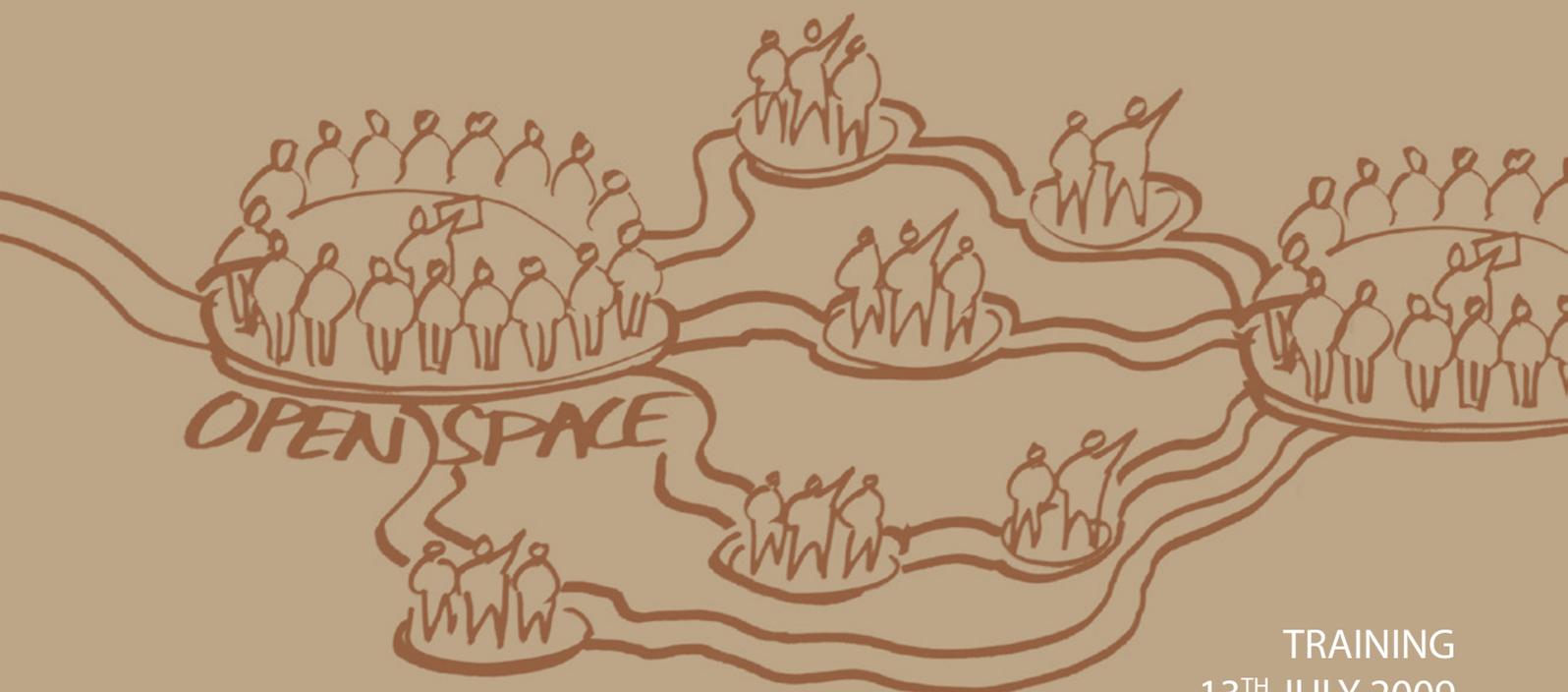


Linda Mitchell
Liz Martins

Facilitating meaningful conversation in the voluntary sector

How can participatory approaches
to learning and change help
the voluntary sector to achieve
real impact and sustainable results
for the benefits of stakeholders?



TRAINING
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This guide is intended to focus and deepen your learning. It will support you following the training, as you engage with the practices of participatory engagement.

Most of the key writers and practitioners in this field take an 'open source' approach to their material. They freely share and make their learning available to all. Much of the material in this guide has been sourced from these practitioners and we thank them. In particular,

Chris Corrigan (including for his work 'The Tao of Opening Space')

Michael Herman

Toke Mueller, Maria Scordialos, Sarah Whiteley and the Art of Hosting Community

Lisa Heft

Bliss Brown

Peggy Holman

Sam Kaner

Harrison Owen

Most of these practitioners have websites – details are in the references and resources section.

This guide is also 'open source' – feel free to share it as you need to, in order to support your work.

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There is no greater power than a community discovering what it cares about.

Ask "What's possible?" not "What's wrong?" Keep asking.

Notice what you care about.

Assume that many others share your dreams.

Be brave enough to start a conversation that matters.

Talk to people you know.

Talk to people you don't know.

Talk to people you never talk to.

Be intrigued by the differences you hear.

Expect to be surprised.

Treasure curiosity more than certainty.

Invite in everybody who cares to work on what's possible.

Acknowledge that everyone is an expert in something.

Know that creative solutions come from new connections.

Remember, you don't fear people whose story you know.

Real listening always brings people closer together.

Trust that meaningful conversations change your world.

Rely on human goodness. Stay together.

Margaret Wheatley



Key differences between standard meetings and events and participatory meetings and events

Participatory groups and meetings	Conventional groups and meetings
Everyone participates not just the vocal few	The fastest and most articulate speakers get more air time
People give each other room to think and get their thoughts out of the way	People interrupt each other on a regular basis
Opposing views are allowed to co exist in the room	Differences of opinion are treated as conflict that must be stifled or solved
People draw each other out with supportive questions – is this what you mean?	Questions are often perceived as challenges, as if the person being questioned has done something wrong
Each member makes the effort to pay attention to the person speaking	Unless the speaker captivates their attention people space out, doodle or check the clock
People listen to each others ideas because they know they will be heard	People have difficulty listening to each other because they are busy rehearsing what they will say
Each member speaks up on matters of controversy, everyone knows where everyone stands	Some members remain quiet on matters of controversy, No one really knows where everyone else stands
People refrain from talking behind each others backs	Because there is no permission to be direct during the meetings, lots of water cooler conversations
Even in the face of opposition from the person in charge, people are encouraged to stand up for their beliefs	People with discordant minority perspectives are discouraged from speaking out
A problem is not considered solved until everyone who will be affected but the solution at least understand the reasoning	A problem is solved as soon as the fastest thinkers have reached an answer. Everyone is then expected to get on board whether or not they understand the logic of the decision
When agreement is made, it is assumed that it still reflects a wide range of perspectives	When people make a decisions it is assumed that are all thinking the same thing

Some quotes

Community and partnerships are built by focusing on the gifts and strengths of the people, rather than focussing on the deficiencies. If we want to make partnerships stronger we should study assets, resources and talents.

John Mcknight

I believe we can change the world if we start listening to one another again. Simple, honest, human conversation. Not mediation, negotiation, problem-solving, debating, or public meetings. Simple, truthful conversation where we can each have a chance to speak, Where we each feel we are heard, and we each listen well.

Margaret Wheatley

Problem focused and analytical methodologies are based on a deficit discourse. Over time they fill the organisation with stories, understandings and rich vocabulary of why things fail. Compulsive concern with what's not working, why things go wrong and who didn't do their job properly demoralises the members of the organisation, reduces speed of learning and undermines relationships and forward movement.

David Cooperrider

All the greatest and most important problems in life are fundamentally insoluble... They cannot be solved, only outgrown. This 'outgrowing' proves on further investigation to require a new level of consciousness. Through a higher or wider broader outlook, the insoluble problem loses its urgency. It was not solved logically in its own terms but faded when confronted by a stronger and new life urge.

Carl Jung

The key to creating or transforming community then, is to see the power in the small but important elements of being with others. The shift we seek needs to be embodied in each invitation we make, each relationship we encounter, and each meeting we attend. For at the most operational and practical level, after all the thinking about policy, strategy, mission and milestones, it gets down to this: How are we going to be when we gather together?

Peter Block

Conversation is not just about conveying information or sharing emotions, nor just a way of putting ideas into people's heads.....conversation is a meeting of minds with different memories and habits. When minds meet they don't just exchange facts: they transform them, reshape them, draw different implications from them, engage in new trains of thought. Conversation doesn't just reshuffle the cards: it creates new cards.

Theodore Zeldin

Living Systems Methodologies and practices

Here is an overview of some of the processes and practices that take a participatory, living systems approach

Appreciative Inquiry: this focuses on generating and applying knowledge that comes from inquiry into moments of excellence, periods of exceptional competence and performance – times when people felt most alive and energised. It emphasises collaboration and participation of all voices in the system, approaching change as a journey rather than an event. Learning from what works and gives life is more effective and sustainable than learning from problems and pathologies.

World Café: an innovative yet simple methodology for hosting conversations about questions that matter. These conversations link and build on each other as people move between groups, cross-pollinate ideas, and discover new insights into the questions or issues that are most important in their life, work, or community. As a process, the World Café can evoke and make visible the collective intelligence of any group, thus increasing people's capacity for effective action in pursuit of common aims.

Open Space Technology: in which participants create and manage their own agenda of parallel working sessions around a central theme of importance to them. It is firmly based on the principles of self-organisation, and with groups of any size creates powerful connections that strengthen learning, responsibility and participation. 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) is high, and the time to get it done was yesterday.

Circle Practice: The circle, or council, is an ancient form of meeting that has gathered human beings into respectful conversation for thousands of years. The circle has served as the foundation for many cultures. What transforms a meeting into a circle is the willingness of people to shift from informal socialising or opinionated discussion into a receptive attitude of thoughtful speaking and deep listening and to embody and practise particular structures.

Future Search: A task-focused planning methodology that helps large numbers of people to transform their capability for action very quickly. It brings people from all walks of life into the same conversation – those with resources, expertise, formal authority and need. The conditions for success are – getting the 'whole system' involved; exploring the 'whole elephant' before seeking to fix any part; putting common ground and future focus at the centre, treating problems and conflicts as information; encouraging self-management and responsibility by participants before, during and after the Future Search

Harvesting: the purpose of the harvest is to serve the wider system by capturing the wisdom, creating a tangible collective memory, seeing patterns, making meaning, and making this meaning visible and accessible. Planning the harvesting process is an intrinsic part of any research project: just as the process of collecting data and information needs collective ownership, so does the harvesting.

Mind Map: a mind map is a pictorial diagram used to represent words and ideas that are linked to, and arranged around, a central word or question. Mind maps are used to create, visualise, group and classify ideas. The elements are arranged in themes in a tree-like structure coming out from the centre, with branches coming off from each theme. Mind mapping in groups encourages one person's idea to trigger another freely without the implicit prioritisation that comes from hierarchies or sequential arrangement

Principles for good convening

Bliss Brown. Imagine Chicago www.imaginechicago.org

Value Local Context

- Listen and incorporate local language, cultural traditions, resources, practices, current questions.
- Understand what processes are already in motion for which this can serve as a next step. Refer to and build upon these.

Expand Participation

- Demonstrate inclusion, in thoughts, words and deeds, to overcome the mindset and practice of division (by race, religion, age, education, etc.).
- Expand who is included and mix them up in unlikely combinations.
- Encourage the participation and leadership of multiple generations, so a vision of the future is present and highly visible.

Create Space for Belonging and Hope

- Shape the physical space to nurture participation. Notice the size, conditions, flexibility and range of space, and orient it in ways that cultivate connections and conversations.
- Trust life, trust people. Be fully present.
- Give space to spirituality and meaning making as a resource for hope and transformation.
- Offer a confident, embodied vision of human (and life) possibilities.
- Assume people want integrity – to align their values and actions.
- Be honest, natural, vulnerable. Allow room for risk-taking and mistake making, for oneself and others.
- Actively nurture a safe and open climate.
- Have good food and time to enjoy it.

Empower Participation

- Begin with and draw from participants' questions and experiences. Make clear that everyone's participation is valued, but not prescribed.
- Ask interesting, constructive questions and listen to responses with respect, delight, interest and commitment. Positively mirror back contributions (by smiling, repeating, recording, appreciating, summarizing).
- Structure the rhythm of interaction to create safety before gradually stretching comfort zones. Move from individual reflection to pairs to small groups to large groups; allow time for large group activities to be personally appropriated. Give options with respect to assignments.
- Integrate artistic expression, to strengthen peoples' confidence and self understanding as creators.
- Create processes that are friendly to a range of learning modes and styles. Emphasize fun!

- Minimize the likelihood of dependency or control by using lateral rather than hierarchical structures, which validate the skills, knowledge and value of each individual and organization.
- Provide time to reflect on and share learning. Use closing circles to highlight and summarize what people have learned and gain support for actions for moving forward.

Re-enchanted the Culture of Citizenship

- Use language in which people are subjects and co-creators of the future (not objects in a depersonalized politics). Favor a culture of community based on commitment over a culture of professionalism and expertise.
- Elevate the language of hope and possibility, to overcome a discourse of cynicism and judgment.
- Assume problem statements are frustrated dreams. Reframe them into possibility statements.

Build Community Identity and Accountability

- Invite storytelling. Exalt the lived experience of community members. Create ways for them to explore and value each other's experiences.
- Encourage group work and group learning, the sharing of gifts, hopes and commitments.
- Jointly brainstorm possible action steps and ways to support and sustain the network that emerges.
- Leave responsibility for action to the participants gathered. Use processes to distill what has most energy and commitment and ask for leadership around these priorities.
- Get feedback on what worked, had value, lessons learned and ways it will be applied. Where practical, provide organizers that will provide a simple framework for reflection and comment.
- Share lessons learned with whoever might benefit from your experience.
- Build in opportunities for celebration!

Say THANK YOU Early and Often



Open space

Spirit of emptiness

The middle of the space is empty. It is itself, the space of invitation, a space of possibility, a space that gives rise to any potential, any direction, any result.

Open Space is a way of navigating everything and nothing. Holding space is the art of being completely present and totally invisible.

Chris Corrigan

1 WHAT IS OPEN SPACE?

Open Space, or Open Space Technology to give it its full title, was developed by Harrison Owen, a USA based consultant who was searching for a way to create better meetings after hearing that the best parts of a conference he organized were the coffee breaks. Harrison wrote "the book" on Open Space Technology, called "Open Space Technology: A User's Guide" which serves as an important articulation of the mechanics and meaning of the process.

The goal of an Open Space meeting is to create time and space for people to engage deeply and creatively around issues of concern to them. It has been described as the most effective process for organisations and communities to identify critical issues, voice their passions and concerns, learn from each other, and, when appropriate, take collective responsibility for finding solutions.

definitions

Open Space is:

"based in the belief that organizations and communities run on passion and responsibility. It allows groups of any size to self-organize around what they really care about to get things done."

"a natural communication process that recognizes that people take responsibility to pursue what they are passionate about, and it ensures that what is important to each participant will be discussed."

"a way of facilitation where original concepts from African meeting traditions have been adapted to an innovative, widely accepted and productive manner of working with groups".

"centred around self-organising and self-managing groups of people that within a minimal methodological framework of procedures develop their own way of working, based on the knowledge, skills, values and attitudes that already exist within the group"

"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"

"the most powerful leadership and meeting approach for the 21st century"

Open Space meetings begin with all the participants sitting in a circle, and no items on the agenda. The meeting opens with an agenda setting exercise following which the group self-organizes into smaller discussion groups. Discussion group conveners are responsible for providing a report of the discussions. This can be made into a 'book of proceedings' which can be shared at the conclusion of the meeting or afterwards.

Open Space meetings operate on four principles and one law. The principles are:

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

And the law is known as The Law of Two Feet (sometimes referred to as "The Law of Mobility"). It states that "If you find yourself in a situation where you are neither learning or contributing, go somewhere where you can."

The four principles and the law work to create a powerful event motivated by the passion and bounded by the responsibility of the participants. As a result, Open Space Technology meetings are characterized by self-organisation and high degrees of freedom for participants. Open Space is an extremely cost-effective way of getting people, information, and spirit moving in an organisation, alliance or partnership.

2 WHEN TO USE OPEN SPACE?

- When there is a real issue of concern
- When there is passion (conflict is an element of passion)
- When the situation is complex
- When there is a high degree of diversity
- When there is a need to make speedy decisions
- When all stakeholders are needed for good decisions to be made
- When you have no preconceived notion of what outcomes should be
- When the aim is to network and learn deeply from each other.

Ideal for community planning, strategic direction setting, envisioning the future, conflict resolution, morale building, consultation with stakeholders. Has been used from 5-1000 people, from a few hours to 4 or more days.

I cannot say what you will experience with Open Space, but I can say what you will not – you will not be experiencing a management fad. [It] is too simple, too obvious, too long-lasting and too applicable to the whole of life to be a management fad.

An Australian CEO

Emptiness

It is called 'Open Space'. The centre is empty apart from a few tools. These tools are all that is needed to completely fill the space.

Blank sheets of paper are open to any possibility. Entirely new worlds can be created out of this emptiness. Great quantities of unknown energy can coalesce around the invitation to step into the full emptiness and give birth to the new.

Chris Corrigan

3 WHAT ARE THE LIKELY BENEFITS OF USING OPEN SPACE?

- Experiential, breakthrough learning
- Open communication and a genuine sense of community
- High play, high creativity, high efficiency, high productivity
- Shared leadership and personal responsibility
- Inspired performance and growth from within
- Elimination of barriers to quickness, excellence and pride

Open Space benefits can evaporate when:

- Leader(s) believe they already know the answer(s) and are looking for ways to sell or impose those ideas
- Leader(s) believe that they are the only ones responsible for, or really necessary for, the organization to do its best work
- Leader(s) are seeking the appearance of participation, but are unwilling or unable to deal openly and directly with high passion or concern, increasing complexity, real diversity of people or opinions, and/or the urgent need to make decisions and take action.

Using Open Space any organisation or group can:

- *Engage everyone who really cares about the question, theme or situation*
- *Identify all of the most important issues and opportunities related to the question, theme or situation*
- *Create working groups to address all of the issues and opportunities identified as essential to success*
- *Practice effective leadership, planning, teamwork, and implementation behaviors without lectures, manipulation, or other external motivation*
- *Do everything that can be done right now or immediately following the meeting, in the normal course of business*
- *Make plans for those issues and opportunities that will require additional study and review before implementation*
- *Refocus attention on those issues and opportunities that require long-term or ongoing monitoring, assessment and/or activity*
- *Document the discussion, ideas, plans, commitments and other progress made on every issue and opportunity identified*
- *Prioritize all of the issues and opportunities raised, based on the best judgment of the entire group*
- *Associate secondary issues and opportunities with top priority items, so nothing important gets lost in the shuffle*
- *Determine immediate next steps in each high-priority area*
- *Distribute the entire proceedings, priorities and action steps to every participant before the end of the meeting and online, just days after the meeting ends*
- *Raise the level of awareness, conversation, learning and activity around every aspect of the organisation's most important business or community interests*
- *Begin to raise the level of learning and contribution, organisation-wide*

Michael Herman

After looking closely at 18 approaches to changing human systems for The Change Handbook.....I believe the amount of structure required is a reflection of the beliefs of the practitioner doing the work. When there is a perception that people need to be led, then they will prove that out. If the perception is that participants will figure things out for themselves, they somehow do. So, how much "help" you think people need will guide how much help they turn out to need.

My untested theory is the factors involved in success include sponsor beliefs (particularly around their passion for and audaciousness of the desired future, sense of invitation to

participate, generosity of spirit), facilitator beliefs (particularly around people's capacity to act wisely for the good of the whole as well as themselves), and method.

By the way, the reason Open Space is so core to my own practice is it makes it so visible that people have the capacity to create what they want. I have seen other methods get people there but there's something so elegant in OS's simplicity in enabling people to live this experience. And at a practical level, there's something that Harrison mentions a lot. If I can accomplish the same thing with a lot less work, doesn't that make sense to do?

Peggy Holman,
author of The Change Handbook

4 THE ROLE OF THE FACILITATOR IN OPEN SPACE

- Support planning meetings and other preparatory conversations to address whole range of pre-event issues:
 - Strategic issue(s) or purpose for the meeting/event
 - Identification of the non-negotiable "givens" within which participants will be invited to work
 - Drafting of the invitation document and method of distribution
 - Development of the invitation list and process of registration
 - Determination of event location and timing
 - Answer emergent questions about design, process, outcomes, logistics
 - Clarify assumptions and expectations
 - Coach sponsors of event on how to answer questions from invited participants
- 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 support their acquisition as necessary.
- Set-up the facility before the event, including conversation with 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.
- Coordinate the production of a record (proceedings document) for all participants
- Debrief with sponsors/convenors as needed, to reflect on what has happened and determine what, if any next steps should be undertaken.

5 PLANNING AND PREPARATION

Planning an Open Space meeting is pretty straightforward, and much simpler than preparing for a traditional conference, although it still takes work.

Key elements

- Agreeing purpose, process and people with sponsors
- Designing the invitation
- Sorting out the logistics

Agreeing purpose, process and people with sponsors

What is the story so far?
What is the context to this event?
What do we need to be conscious of?
What is the real need of the people we serve?
What is the long term intent?
What is the purpose of the conversation?
What needs to be harvested out of it?
How will we harvest?

(Toke Mueller)

Is Open Space right for this event or meeting? Harrison Owen talks about conditions of diversity, complexity, passion and decisions needed yesterday. Sponsors need to understand that once it starts, it has to run and they must play by the rules along with everyone else – don't use it if they can't live with the uncertainty and the consequences.

What is the theme?

Open Space meetings are held around themes bounded by givens.

The theme is the statement or question that you will use to harness the passion of your group. Take time to get this right. Usually the theme is best focused in the form of a 'wicked question', one that challenges and inspires.

The givens are those things that are essentially non-negotiable. Some Open Space events will deliberately not put in the givens, but encourage participants to dream.

Before you set up the chairs and bulletin board, before you send out the invitation, you'll probably have to explain Open Space to somebody. This isn't always easy. There are a lot of things it IS NOT, but helping other people see what it IS can be quite a challenge. Mostly, I think, this is because it just doesn't matter. Open Space works, period. If, that is, your purpose is important and your people are willing to take some responsibility for addressing it. So the best way to talk about Open Space is to not talk about it. Talk about the purpose. Talk about the people, the resources and the deadlines. The meeting places, the dates, the time available. Talk about the results you want to achieve. Even if you really just want to try out the process itself, find a really juicy purpose or question first.

That saidthe following list of story seeds is what I sometimes use to guide the conversation about Open Space as a method, which is different from (and quite secondary to) the conversation about the results that want/need to happen inside of the organization.

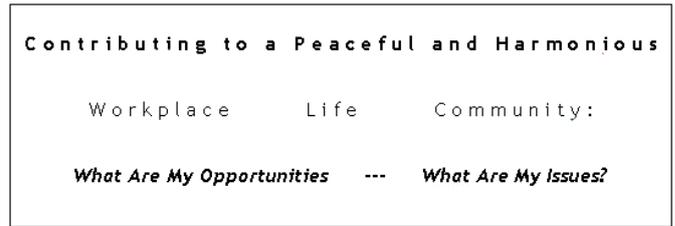
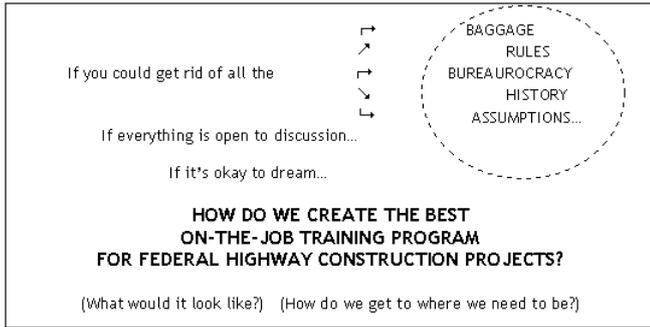
- *ost gets people and info moving*
- *the energy of a good coffee break*
- *growing more of what's working (here, already)*
- *complexity, diversity, conflict, deadlines*
- *passion bounded by responsibility*
- *invite everybody, require nobody, accept anybody*
- *you get what you ask for*
- *one more thing to NOT do (for people)*
- *circle, bulletin board, marketplace, breathing*
- *appropriate structure and control*
- *the four principles: be prepared to be surprised*
- *the law of two feet: learning and contribution*
- *action, buy-in, and other illusions*
- *how inviting is your organization?*
- *fully present and totally invisible*
- *letting go... into movement*
- *promises we can keep*

Michael Herman

For more detail see

www.michaelherman.com under *Essential Elements*

Some examples:



Who should be invited?

The broader the diversity, the greater the potential for innovation and learning.

Time needed? – it is said that Open Space will achieve:

- Half a day – uncover what's at 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 – as for two day, and also action plans

However, Open Space is adaptable and flexible. For example, a small group of 12 having two conversations of 20 minutes each will still get an opportunity to meet and learn around issues that matter to them.

Designing the Invitation

Include

- something that clarifies this is an invitation (there is choice about attending)
- the purpose and desired outcome
- the host
- some information about the approach (25 words or less on OS)
- time, start and end times
- registration
- logistics
- location and how to get there
- food
- how to register
- if numbers limited
- idea that people should come to whole event, no 'drop-ins'
- contact for more information

Peggy Holman

Lots of examples of invitations on OS sites (see reference pages)

The invitation

The invitation itself was very simple, probably just a page or two, maybe a short email or postcard, or even something posted on a bulletin board. It spoke plainly about what's working, what's possible, and/or what's needed now in some area of real importance. It was clearly not an invitation to complain or even "solve problems," but rather to co-create some dimension of the organization, the community, or the world that we all really want to be a part of. This doesn't mean that it denied or in any way minimized the importance of existing problems, only that it really focused attention on our strengths and assets – and invited people to work together to create more of them.

If circumstances allowed, you received this invitation well in advance of the gathering date(s), so that you could plan your schedule around it. A late invitation just isn't as open, credible and welcoming as one sent in advance, whatever "in advance" means in your organization. Alternatively, this gathering could be an urgent call to respond to some new situation or opportunity that's popped up. Either way, the invitation announced the theme (purpose or intention) for this gathering and provided a brief explanation (or reminder) about its importance or connection to your life. Perhaps it also invited you to spread the word, to other people you know who are interested in this work.

We should note here that Open Space can only fail for two reasons: if people show up with no passion and/or if somebody tries to control the process in order to achieve some sort of pre-determined outcome(s). And, the commitment to openness, passion and responsible self-organization begins with the invitation process itself.

The theme or purpose on which we've been invited to work was open, broad, and demands a creative, collective response. The invitation was extended to a diverse group of stakeholders and clearly stated the parameters for our work here. And, to the greatest extent possible, everyone here is participating voluntarily, because they have discovered that they have something to learn or contribute to the work we need to do.

The simple, clear, broad and open invitation process assures that the people who show up have real passion for the issue AND signals to them that the best outcomes are theirs to create. A good invitation lets everyone know, even those who can't or won't actually attend, that this meeting is intended to go beyond suggestions, beyond recommendations, beyond rubber-stamping, beyond past expectations. This meeting is for real responsibility, real learning, real action on the issue(s) at hand. Even if the number of attendees had to be limited, for financial or other concerns, this could and should have been done in ways that don't limit the passion and possibility of the work.

Michael Herman

Logistics

For Open Space you will need a room that holds double your attendance, theatre style. If you are expecting 50 people, then you will need a room that sits 100, 'theatre style', at a minimum.

The bigger the better. If you can't get this, then make sure there is a variety of breakout spaces available.

Ideally the room should be square (helps to form a circle within), have natural light, high ceilings. The room will need a blank wall that you can fix posters to and for people to post their agenda items.

Set out chairs in a circle. One ring is ideal but concentric rings can be used if space is tight but avoid more than two rings of chairs. Make sure there is plenty of space to get through to the middle.

Breakout rooms should also have a circle of chairs set out. The location of particular conversations should be clear to participants.

No tables, apart from a couple for food, if serving this, and computers, if you are using these.

You will need lots of flipchart pens, flipchart paper, several pads of 3x5 post-it notes, masking tape, scissors, simple forms for recording discussions, talking stick. You may want to add additional pens and papers, nametags etc.

You may need to have a sound system (two 'roving' microphones) and laptops/printers etc if you are planning to develop a record as you go.

You will need posters of the theme, principles and law.

Generally in Open Space meetings and events food would be buffet style, help-yourself to coffee etc so that people can work and talk as they choose.

A sample checklist for on-site preparations is contained in Appendix 1.

The room has importance beyond its functionality. Every room we occupy serves as a metaphor for the larger community we want to create...If the future we desire does not exist in this room, today, then it will never occur tomorrow...rearrange the room to meet our intention to build relatedness, accountability and commitment.

- *Arrange the room as the shape of things to come (circle for community)*
- *Pick a room with a view*
- *Welcome nature into the room*
- *Amplify the whole room*
- *Choose chairs that swivel and have low backs (movement and connection)*
- *Level the playing field (no podiums)*
- *Bring in art and the aesthetic*
- *Put life on the wall*

Peter Block

Of course, all it really takes is an issue that matters, written up in a simple invitation, distributed to a list of those you think do or should share your passion for this issue, a space and time to gather, and some way to capture the story so it can be shared beyond your initial meeting. It really can be that simple, almost anywhere, especially if we remember that we this first event need not be a 300-person, company-wide, strategic-direction-setting sort of event.

Michael Herman

6 OPENING AND HOLDING SPACE

No acclaim

We begin with people in a circle. There are no names, no titles, no ranks or descriptions. Just a circle of people, being a circle together.

It is not your job at this point to say you have credentials. It is not your job to seek approval from them. You simply walk the circle, inviting eyes to connect, inviting hearts to meet in the empty space you are about to hold.

Chris Corrigan

The role of the facilitator is twofold. Firstly to open the meeting by explaining the process and inviting people to come forward to post their items for the agenda. Once the meeting is running, the facilitator 'holds the space'. What this means in practice is ensuring that the space that has been opened is safe and open for creativity and interaction. It means getting out of the way of the group and allowing people to do things for themselves. This is crucial to the success of an Open Space meeting.

Four principles apply to how you navigate in open space:

Whoever comes is the right people

Whoever is attracted to the same discussion are the people who can contribute most to that discussion because they really care.

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, in the present time and place, and not worry about 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.

The Law of Mobility 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.

Opening space

An important aspect for a facilitator of Open Space is to prepare yourself so that you are able to be fully present, grounded and open to whatever happens.

Often the sponsor will start with a welcome and introduction to the event. This should be for no more than a few minutes and could include:

- Thanks for coming
- The purpose of the event
- Who is here
- Their commitment to the group: what they personally will do with whatever comes out the other side, acknowledge any constraints
- Their hopes and expectations for the group and what it can become

The facilitator then 'opens space'.

Elements that needs to be covered include

- State the theme
- State any expectations for outcome, constraints or commitments
- How it works – will invite posts to put up on wall etc
- Anyone can post, no one must – coming from passion and responsibility
- Role of hosts – to convene, ensure a record of session
- 4 principles
- One law – personal responsibility
- Bumblebees and butterflies
- Logistics – locations, breaks etc
- Invite people to post.

Facilitators develop their own style. Some facilitators will walk round the circle as they speak; some may tell a bit of the story of how Harrison Owen developed Open Space; some may invite a few minutes of quiet reflection before opening up for people to post. What's important is that participants have understood the process and have the message that this is about taking personal responsibility.

Most facilitators will have put up posters round the room with the theme, the 4 principles and 1 law, and drawings of a butterfly and a bumble bee. They will point these out as they talk.

Post-its and marker pens need to be in the centre of the circle. Access to the bulletin board needs to be possible.

There are sample scripts in the appendices. U Tube has video clips of people, including Harrison Owen, opening space.

Opening the space

The facilitator begins with an invitation to do what you've already been doing, looking around the room, seeing who's here, signaling good morning to the people you know and taking notice of any faces new to you. The theme is restated and briefly explained, perhaps a short story of how we got here, with the reminder that everyone you now see in the circle is here because they care about some aspect of this theme -- and have chosen to be here, to learn from and contribute to the work at hand. The facilitator also explains that the big empty wall is, in fact, our agenda. He acknowledges that it is a giant empty space, but reassures us that it will, within the hour, be filled with discussion topics related to the theme. He makes it very clear that all of these breakout session topics will be proposed by us, the people now sitting in the circle. The logistics of this are equally clear.

While the reality of this responsibility sinks in, the Four Principles are explained. What seemed strange when you read the posters earlier, now seems to make a lot of sense. "Whoever comes is the right people" acknowledges that the only people really qualified or able to do great work on any issue are those who really care, and freely choose to be involved. "Whenever it starts is the right time" recognizes that spirit and creativity don't run on the clock, so while we're here, we'll all keep a vigilant watch for great ideas and new insights, which can happen at anytime. "Whatever happens is the only thing that could have" allows everyone to let go of the could haves, would haves and should haves, so that we can give our full attention to the reality of what is happening, is working, and is possible right now. And finally, "When it's over, it's over" acknowledges that you never know just how long it'll take to deal with a given issue, and reminds us that getting the work done is more important than sticking to an arbitrary schedule. Taken together, these principles say "work hard, pay attention, but be prepared to be surprised!"

The one law is The Law of Two Feet. It says simply that you, and only you, know where you can learn and contribute the most to the work that must take place today. It demands that you use your two feet to go where you need to go and do what you need to do. If at any time today, you find that you are not learning or contributing, you have the right and the responsibility to move... find another breakout session, visit the food table, take a walk in the sunshine, make a phone call -- but DO NOT waste time.

This simple rule makes everyone fully responsible for the quality of their own work and work experience. It creates bumblebees who buzz from session to session, cross-pollinating and connecting pieces of the work. It creates butterflies who may not join any formal sessions, choosing instead to float at the edges. They create the space for everyone to appreciate the energies and synergies unfolding in the work of the conference. Sometimes the most amazing solutions seem to come out of nowhere -- so that's where butterflies tend to look for them.

After a quick logistical review, the facilitator invites anyone who's ready to come to the center of the circle, grab a marker and a sheet of paper, and write down their burning question, passionate issue, or great idea. To the surprise of many, a number of people spring from their chairs and are quickly on all fours in the center of the circle, scribbling their offerings. As each one finishes, they read their issue(s) out loud. These aren't speeches; just simple announcements. "My name is _____, my issue is _____," and we're on to the next one, while they tape their sheet to the wall and assign it a place and a time (from a pre-arranged set of space/time choices). This is how even very large groups can create two or three days of agenda in just one hour. As the wall fills, those who were at first surprised, find words for their issue and grab a marker. And then, as fast as it started, it's done.

Michael Herman

Common questions and suggested responses

People want to go to more than one session happening at the same time and ask if things can be changed round.

It's up to the convenors if they wish to change, may mean that someone else is then put in the same position. Participants can be in several places at the same time, by being a bumblebee.

What if I post a session and no one comes?

It shows that for other people here, at this time, other issues have more priority, it doesn't mean that it's not important. Choice to take down the session from the board and do something else, or use the golden opportunity to take some time to reflect on an issue that matters to you.

Two sessions look the same and it's suggested that they are combined.

This is up to the two convenors. However, it may be that the two sessions will approach the issue from slightly different angles, have different people in conversation, and come up with different conclusions. So maybe better to have both.

What if we want to continue the conversation when the time is up?

That's fine, remember the principles. Just need to ensure that not in someone else's space. If it is 'booked' move or negotiate that they meet somewhere different (and put it on the bulletin board).

Holding space

Once the meeting is up and running, the role is to 'hold the space'.

This means attending to the room, and the process, but staying out of the way. Sometimes this means doing little more than picking up the coffee cups and re-taping agenda items that have become unglued. This is a powerful symbol of the leader's concern for the common space.

It means walking about to see how things are going. When difficulty is encountered, it is important not to take charge, but rather to throw responsibility back on those who need to hold it. Open Space requires real freedom and real responsibility.

Leadership in Open Space requires that one set the direction, define and honour the space, and let go.

Simplicity

Open Space is a simple yet elegant thing. Don't burden it with wit and savvy and expertise. Simply walk to the centre of the circle, explain the process and get out of the way.

This is opening space.

Chris Corrigan



Stay focused

Your job is not to do the work of the group. Your job is not to involve yourself in the small distractions of the day. Your job is not to feel anxious for all the people who are struggling with their learning.

Stay focused on your job: holding space. Remain at peace in the chaos, remain detached in the emerging swirl of attachment. People will be shedding stories and assumptions all around you. Avoid catching them.

Chris Corrigan

7 CONVERGENCE AND CLOSING

Embody impossibility

*Open Space should not work.
It should be impossible to put people
together in a room with no agenda
and have them create powerful
and transformative conversations.
That's the hard part. Rest in that and
the impossible becomes possible
everywhere else.*

Chris Corrigan

Convergence and closing can be seen as two complementary but different levels of closure to the exploration created by Open Space.

Sometimes at the end all that is needed is a closing circle after the conversations have ended. This may be the case when the focus has been on exploration. However, it is usually good to have at least some form of minimal convergence, even at an individual basis, for example, people writing an interest/commitment for themselves.

Sometimes, a greater level of convergence will need to be designed into the event. This is so particularly when it is important to give participants or an advisory or decision-making group a 'snapshot' of the key issues that

have emerged, or to highlight next steps or action items. Convergence gives a stepping stone for the future. Simple convergence sheets can be given to the convenors so that a record of the key points of each conversation is harvested – see Appendix 5 for an example.

It may be that the goals will be best achieved by opening things up and expanding outwards at the end of the event in a sort of 'non-convergence'. One way is to close the space, then to reopen it for action planning and further work.

Many facilitators feel it is important not to finish a session in a way that loses the spirit of Open Space by closing things down in a reductionist way.

Approaches

Tend to fit into 3 categories

- Voting and prioritizing – using marks or adhesive 'red dots' or voting software to highlight the 'hot items' out of the many that emerged in discussion – to give a 'snapshot' of what are emerging issues, for shifting to action planning or for reflection about what the group as a whole can or should focus on for the next steps.
- Synthesis – a variety of methods to help a group see a common and often new pattern for action or reflection. For example, mind-maps, devising and presenting a skit, reflecting individually, posting themes and clustering these.
- Reopening space (also known as non-convergence) – an invitation to take responsibility for what you care about and work with those interested in joining you.

Helpful questions

How do we get this spirit out of the room?

As a result of this session, I...

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

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

What did you notice? What surprised you? What's emerged for you?

What is necessary to support this spirit, action, work, project, whatever is going forward?

What is possible now?

What surprised you? What inspired you? What challenged you? What touched you?

(from Angeles Arrian's Four Fold Way)

Closing Outline

- I. Are there stories anyone wants to tell?
Perhaps new insights into their work or experiences with the principles or the law?
- II. What common ideas emerged?
Try doing a quick “around the circle” question:
Name the most important priority that emerged for you.
- III. Consider asking 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.
- IV. Do a talking stick closing: talk about what this experience meant to you.
- V. Acknowledge their accomplishments: They’ve just blown their cover: you have demonstrated that you can work together; give examples from the session; now you have a choice.
- VI. Make my request of them: be the change they want in the world: bring this way of working together back to the work place and share it with others.
- VII. Say thank you...it’s been an honor to be with you.

Peggy Holman

Keeping it going

In most situations the task is to produce an effective event, but the real goal and challenge is to keep it going. This can be helped by:

- Re-opening the space at the end for action
- Have participants identify immediate next steps and resources in the event (whole group or breakout sessions)
- Publishing the record of what happened
- Creating a gallery of photos
- Ensuring that participants have each others contact details
- Have short follow-up meetings for leaders and champions
- Set up e-mail announcement or discussion group so news can keep getting out
- Enable ongoing posting in a weblog
- Offer coaching and training to leaders

Open Space is not magic

You have opened a space and the group is at work within it. But you haven't opened a space - the sponsor has. And the sponsor hasn't opened a space - the space has always been there. What you are seeing can happen anytime.

It is something anyone can have. It is right there, bounding every act of creation, every inspiration and every idea.

It is not yours and nothing that happens within it belongs to it. The magic is not Open Space. The magic is the loosening of chains and the dissolving into what is.

Chris Corrigan

Walk away

And when the event is over, walk away and let the people embrace each other, share their comments with one another, exchange smiles and astonishment. It is their work, and you have held space for it and that is all. All that is left to do is to walk away.

Chris Corrigan

Resources and references

WEBSITES

www.openspaceworld.org
<http://listserv.boisestate.edu/archives/oslist.html>
– the Open Space community e-mail list for global support
www.artofhosting.org
www.theworldcafe.com
www.appreciativeinquiry.case.edu
www.aipractitioner.com
www.futuresearch.net
www.youtube.com/watch?v=Ux_LFjFeCvg
www.youtube.com/watch?v=V22R6_7eDNE&feature=related
www.youtube.com/watch?v=TDi0GLTO9ao&feature=related

Open Space practitioners

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

BOOKS

Baldwin, Christina. *Calling the Circle: The first and future culture*
Block Peter *Community: The Structure of Belonging*
Brown, Juanita and Isaacs, David, et. al. *The World Cafe: Shaping our Future through conversations that matter*
Herman, Michael and Corrigan, Chris (eds.) *Open Space Technology: A User's NON-Guide*
Holman, Peggy, Cady, Steve and Devane, Tom (eds). *The Change Handbook: Large group methods for shaping the future.*
Lewis, Passmore, Cantore *Appreciative Inquiry for Change Management*
Kaner, Sam et. al. *The Facilitator's Guide to Participatory Decision Making*
Owen, Harrison. *Open Space Technology: A User's Guide*
Owen, Harrison. *Expanding our Now: The story of Open Space Technology*
Scharmer, Otto. *Theory U*
Wheatley, Margaret. *Leadership and the New Science*
Whitney, Dianna and Trosten-Bloom, A. *The power of appreciative inquiry: a practical guide to positive change*

CHECKLIST FOR ON-SITE PREPARATIONS (adapted from Michael Herman)

Purpose and People

- need or opportunity clearly identified -- what are we to DO? -- their language, questions, issues, purposes, boundaries, etc... not mine
- broad, creative theme, question or statement that captures intent for gathering
- clear understanding of who is here, where they have come from, how they got here.

Meeting Site

- large room - no tables or other obstructions, clean wall
- breakout spaces - 7 per 100
- chairs in circle (2 concentric circles if necessary)
- microphones (2), confirm dead areas of room
- food plan - buffet
- computer plan - room/tables, incl. printer, 5 per 100 people
- flipcharts and easels, one per room

Supplies

- posters - theme, grid/wall labels, 4 principles, 1 law, bees/flies,
- breakout spaces labeled
- blank paper for issues posting
- markers, tape, post-its, nametags(?)
- bells/talking stick
- computers or poster boards for making summaries

Set-up

- circle of chairs, NO tables, podium, etc
- posters around room in order, starting with theme
- blank wall or grid, labelled with space/times
- markers, tape, pencils, nametags, bells
- breakout spaces labelled

Information Processing

- participants details
- sheet to record the issues
- convergence sheets – record of discussions
- 'red dots' or other methods for prioritizing issues and actions

Information Processing (if using computers in large OS)

- proceedings cover page
- participants details
- instructions for typing up notes, posted on flipchart
- sign-up sheet for assigning issue numbers
- computer room hours and deadlines poster
- proceedings reports file folder
- proceedings report template on disk (download ms-word form doc)
- copies of report template to pass out to conveners during opening
- voting software and easels for action planning session

OPEN SPACE EVENT CHECKLIST – PEGGY HOLMAN

Pre-event Planning

- Pick theme (what's the intention?)
- Determine who to invite, determine anticipated attendance
- Set date
- Select a space (large room, no obstructions, adequate wall space, tape on walls okay)
 - Circle for main room, flexible breakout room configurations (adequate space for main room = room capacity/2)
 - Accessibility okay?
 - Breakout Rooms (number)
 - Smoking area?
 - Registration area
- Decide what, if anything, to do about assessing the outcomes
- Plan strategy for getting support from the people who can impact the event
- Develop and send invitation
- Develop registration packet (e.g., pre-reading, logistics, travel support – hotel rooms, cars, maps)

Logistics

- Work with “space” staff on room set-up (circles are an unusual request; offer a book or article on OST)
 - Get list of breakout room names, maps to rooms
 - Any signage required to find spaces?
- Plan meals (ideally buffet; food that can be out for several hours)
 - Arrange details with caterer (breakfast, lunch, dinner, breaks)
 - Arrange for any special food needs
- Arrange for wireless microphone, plus spare battery
- Proceedings plans
 - Done by hand? By computer?
 - If by computer, arrange for computers (about 1 per breakout space)
 - 1 printer
 - Adequate power, tables for computers
 - Template for compiling proceedings (topic name, convenor, participants, discussion)
 - Copying arrangements? Internet site arrangements?
 - Cover design?
 - Introductory remarks?
 - Participant list (contact information)

- Any legal issues to consider?
- Any union issues to consider?
- Set date for debrief

Supplies

- Main Circle
 - Magic Markers (lots, create a feeling of abundance)
 - Post-its (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)
 - Convenor responsibility sheet to help with note taking (enough for each session, plus a few)
- Registration
 - Registration list
 - Name tags, pens for writing names if not pre-printed
 - Any welcome materials (logistics information, journal, pen)
- Other
 - Talking object
 - Bells or other attention getter
 - Business cards, flyers, other info of value to share on a resources table
 - Clip board and e-mail sign-up sheet for recording who owes reports

Day of event set up

- Prep sponsor for doing opening and their role (participate!)
- 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?

SAMPLE OPENING SCRIPT BY PEGGY HOLMAN

I. Welcome; Create space

- A. [Brief introduction by sponsor]
- B. Introduce myself, honored to be here
- C. 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 the arts made a difference...). 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., create the organization you really want to work in)
- 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 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. At the core of OS is the belief that organizations work when people take responsibility for what they care about, on behalf of themselves and the whole
 - 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
 - 4. Responsibility: to convene group, document session
 - 5. 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. When people take responsibility for what they care about, these four principles naturally emerge.
- B. Whoever comes is 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!
- C. 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
- D. When it starts is the right time.
 - 1. The last 2 principles are about our relationship with time. Rather than letting the clock rule, use them 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
- E. 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.
 - 3. 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: 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 hang out in the coffee shop, by the pool, in the bar
 - (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. It's 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 convenor(s)
 3. If there are more session 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 convenors a feel for how many are interested in coming

SAMPLE OPENING SCRIPT FOR OPEN SPACE – MICHEAL HERMAN

This script is something I first distilled from Harrison Owen's Open Space User's Guide (available at any good bookstore). Over the years I've added my own notes. It helps me remember what really needs to be said in the opening of the space, and what really does not. I don't think I've ever opened the space without a copy of this in my back pocket, but that's just me. I HIGHLY recommend getting the User's Guide and working out your own process. In the meantime, here are my notes...

Welcome/Introduction

- Look around circle/bounding the space
- What do we know about who's here? ...nobody knows, everybody cares, nobody in charge, everybody skilled

State the theme

- Summarize comments by host/sponsor/client organizer, see 'opening remarks' notes

A Little History

- OST has spread worldwide in the last 20 years, 1000's of events in 90+ countries on 5 continents, with no marketing budget or advertising department
- African villages, corporate boardrooms, all kinds of churches, the Peace Corps and the Pentagon, Banks and Techs, government and community organizations, school leaders and youth groups... with anywhere from 5 to 2000 people at a time
- The results have been outstanding – it will work here, too

Describe the Process - How this is going to work today

- Invite those who want to, and nobody has to
- Identify some issue/opportunity related to our theme
- Something you have real passion for and will take personal responsibility for starting the conversation about it
- Don't have to be an expert with answers, need to care enough to ask the question and start the conversation
- If nothing occurs to you, fine -- if more than one, post them on separate pages
- In a minute, ask to come forward, grab the paper and markers
- Write your topic and you name
- Read it out -- "my name is ... and my issue is...."
- Post it on the wall so everyone who shares your interest can find your conversation

The Four Principles

- Whoever comes are the right people don't need 100 people and the ceo to do good work...need the people who care if nobody comes, might be a bad idea, or just bad timing you might be the only one who knows enough to deal with it or see its importance take it as just another piece of information, spend time on it yourself or move on
- Whatever happens is the only thing that could have be prepared to be surprised, be very dull if everything always went as expected forget coulda, woulda and shoulda and go with the flow of what is here and now
- Whenever it starts is the right time -- spirit and creativity don't run on the clock
- When it's over it's over if you finish in ten minutes, don't rehash for another 50...move on when it's not over, it's not over...so you might have to move, but don't have to end

The Law of Two Feet

- You have the right and the responsibility to use your two feet to go wherever you need to in order to maximize your own learning and contributing today.
- When mind wanders, take your body with it... stay whole!
- If you're not learning or contributing...go someplace else -- don't waste time.
- Means if you aren't enjoying where you are, it's totally your choice to stay or move on
- Law is death to egotists and speechmakers
- Creates bumblebees who cross-pollinate and butterflies who create space to just be

Veteran Strategies

(some suggestions sometimes offered for shorter spaces, with thanks to OST veteran Giles Hopkins, sometimes I make an extra poster with most appropriate items from this list)

- Be a bumble bee, butterfly
- Ask a provocative question
- Convene a consulting group
- Save time to ask for conclusions/recommendations
- Pass a sign-up sheet to gather participant names
- Convene a sequel
- Limit attendance and do it twice
- Issue "special" invitations
- Find a co-conspirator (co-convener)
- Type the notes from butterfly conversations
- Capture notes on flipchart paper
- Convene lunch/dinner sessions
- Hold your session in whatever language works
- DO talk to strangers
- Listen for something really new
- Speak your mind
- Plan some actions
- Work, play, learn, dream, move
- (to be continued...)

Jumping In

- Can't learn to swim from the side of the pool -- time to jump in
- Identify an issue or opportunity for which you have some real passion
- Think of a short title and write it with your name
- Read it out -- my name is... my issue is..... -- no speeches required or allowed
- Post it and come back to circle

Sign-ups

- Clear a path to get to the wall
- Sign up for everything that interests you, even if more than one during the same session
- Conflicts...can combine, move or bumblebee, but conveners have final word on it
- On your own, take responsibility for your own meetings/times, bells don't ring until closing
- Go to your first session as soon as you're done signing up

=== beneath and beyond the opening briefing ===

Guiding Metaphors

- hero's journey
- treasure hunt, nobody knows
- blowing bubbles
- bubbling cauldron
- creeping ivy
- room to work

Guiding Intentions

- be with, be open, be space
- expanding our now, nobody knows
- presence invites presence
- what if it all really works?
- open invitation, unconditional offering
- room/right to make own choices
- less is more
- have fun, play

Answers to every question

- what do you want to do?
- great, why don't you take care of it?
- evening news - one word to describe how feeling, where you are

- morning news - new topics to post? other news?
- talking stick closing - how do you feel? what has this meant? what have you learned? what will you do now? what is required to sustain this movement?
- reading proceedings - pay special attention to those issues not attended and not familiar with
- voting instructions - is NOT political win/lose, IS sifting and sorting to find where the greatest energy and greatest needs are, vote for the importance of the issue not the quality of the report

Closing

- distribute proceedings -- gallery of notes, copies of handwritten notes, books of typed notes
- talking stick -- passed around, left in center, or delivered to those who raise a hand
- cycle of invitation story - invitation, topics posted, proceedings, new invitations
- medicine wheel story - leadership, vision, community, management
- prioritization - clustering, sticky dot voting, computer voting, reopening
- repeating the cycle of review, check-in/closing, opening, breakouts

SAMPLE FORMAT FOR CONVENOR - Peggy Holman

Responsibilities of the convenor

Identify a scribe (you may do it yourself or ask for a volunteer)

Record the name of the session, convenor's name, and participants below

Start the discussion

Capture the discussion from your session (see the notes at the bottom of the page)

Take notes to the newsroom (or to the facilitator)

Topic: _____

Convenor: _____

Participants List

Name

Some thoughts about your notes:

- Capture what was discussed by participants 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

