

Leith's Guide to Open Space

An **Open Space meeting** is a one, two or three day meeting in which 50, 100, 500 or more people discuss issues of heartfelt concern, share their ideas, pool their knowledge and work together to find new ways forward.

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What is an Open Space meeting?

An Open Space meeting enables participants to create their own programme of self-managed sessions (such as discussion groups, experiential workshops, ideas sessions and planning meetings) related to a central theme, such as: *What are the issues and opportunities facing the XYZ Corporation?*

Open Space allows diverse and often very large groups of people to get together, discuss issues of heartfelt concern, pool their knowledge and develop plans for collaborative action.

The participant group can be of any size, from twelve people to a thousand or more, and the meeting is usually held over one, two or three days.

There are no invited speakers, and just one facilitator to explain the procedure and facilitate the plenary sessions.

Open Space meetings are typically held to create a new vision, figure out how to implement a strategy, plan a significant change, solve a complex or intractable problem, invent a new product, or prepare for community action. They are also increasingly used by organisations as an alternative or adjunct to their annual conference.

Since 1985, Open Space meetings have been used in different parts of the world by a wide range of companies and non-profit organisations including Cabinet Office, Guinness, Home Office, ICI, McCain Foods, National Health Service, Pricewaterhouse Coopers, Robert Bosch and Shell.

The Open Space approach is particularly effective when complex or conflict-ridden issues must be resolved quickly, and when participation, collaboration, alignment and ownership are desired outcomes.

Harrison Owen, originator of Open Space, says: *“At the very least, Open Space (or, to give it its full title, Open Space Technology) is a fast, cheap, and simple way to better, more productive meetings. At a deeper level, it enables people to experience a very different quality of organisation in which self-managed work groups are the norm, leadership is a constantly shared phenomenon, diversity becomes a resource to be used instead of a problem to be overcome, and personal empowerment is a shared experience. It is also fun. In a word, conditions are set for fundamental organisational change.”*

As Harrison Owen says, Open Space is more than a powerful methodology for creating productive meetings. It has the potential to form the basis of a new kind of organisation in which collaborating and co-creating are a way of life.

Co-creating

In *The Fifth Discipline Fieldbook*, Bryan Smith describes five different ways to create a vision: Tell, Sell, Test, Consult and Co-create.

(These are also ways to develop a strategy for realising the vision, and ways to create an implementation plan.)

Here is a brief description of each of the five ways.

Tell

What the leaders do: *Demand compliance*

“This is the plan; everyone has got to adhere to it without deviation, or there will be trouble”

Telling is generally the least effective approach.

Sell

What the leaders do: *Seek buy-in*

“This is the plan, the benefits of which are as follows ...”

Test

What the leaders do: *Invite response*

“This is the plan ... tell us what you think about it and we will consider incorporating your ideas”

Consult

What the leaders do: *Request input*

“We are developing a plan and would like to solicit your ideas and opinions before putting pen to paper”

Co-create

What the leaders do: *Collaborate*

“We’ve got a blank sheet of paper ... let’s sit down and create the plan together”

Co-creating is about people working together as equals to bring something new into being, or to bring about a mutually-desired change.

Examples include cross-functional collaboration and inter-agency working.

This approach is generally the most effective when you want to create visions, strategies and implementation plans that lead to breakthrough results and sustainable change.

Open Space is one of the most powerful tools you can use whenever you want to co-create a rapid shift from Now (the current state of affairs) to New (the desired state of affairs).

What an Open Space meeting is not

We need to make it very clear that an Open Space meeting is not:

- a brainstorming session (people discuss their *heartfelt* concerns)
- a glorified suggestions session (the emphasis is on taking personal responsibility)
- a bitching session (ditto)
- a 'jolly' (an Open Space meeting involves high play, but also high learning)
- total anarchy (there is appropriate structure and appropriate control)

What an Open Space meeting typically delivers

These are some of the results that are often delivered by an Open Space meeting:

- People's deeply-felt concerns are known.
- Hearts and minds are fully engaged.
- Productive working relationships are created.
- Cross-functional communication links are established.
- New behavioural norms emerge.
- A strong sense of community arises.
- Participants' genuine concerns are identified and discussed.
- Creative and relevant ideas are developed.
- There are concrete plans for collaborative action that people really own
- Self-managed project teams are in place.

The most tangible output from an Open Space meeting is set of written reports, one for each session, usually with action points.

An action planning process can be run after the Open Space meeting to create a prioritised list of actions and projects and to establish self-managing teams to undertake these projects.

Common uses of Open Space meetings

Annual conferences
Change management
Collaboration
Community building
Community participation

Conflict resolution
Continuous improvement
Corporate reinvention
Customer service
Employee participation
Innovation
Knowledge management
Market research
New product development
Organisation-brand alignment
Organisational learning
Problem solving (complex or intractable problems)
Project planning (complex projects)
Public participation
Quality management
Strategic alliances
Strategic planning
Strategy implementation

Do not use Open Space meetings when:

- The topic is too broad or too specific
- The Open Space meeting is viewed as a one-off event rather than part of a larger set of value-creating activities taking place over time
- The plans have already been formulated
- There is a desire to control the process
- The achievement of a specific outcome is essential
- The sponsor has a hidden agenda
- There is little or no commitment from management to support the projects that emerge

Question the use Open Space meetings when:

- Full attendance is a prerequisite (participation in an Open Space meeting is normally voluntary)
- Time is tight
- The desired outcome is a set of recommendations rather than a portfolio of self-managed projects
- The venue is unsuitable or a venue inspection is not an option
- One or more members of the leadership team will not be present



Overview of an Open Space meeting

- 1. Briefing** Participants gather for the opening plenary. They sit in a circle, to indicate that everyone is equally a leader. The facilitator states the theme of the forum, describes the principles that underpin Open Space and explains what is going to happen.
- 2. Creating the agenda** Anyone who feels so inspired can offer one or more sessions (such as a presentation, workshop, discussion group or task force) by creating a simple poster showing the title of the session and his or her name, making a brief announcement to the whole group, and choosing a room and a timeslot.
- 3. Sign up** The posters are fixed to the wall and participants sign up for the sessions that they wish to attend. Much negotiating usually occurs at this point: convenors offering sessions on similar topics may decide to join forces, and people may ask for sessions to be retimed to make their participation possible.
- 4. Sessions** Participants then self-organise and pursue what interests them, attending sessions or being a bumblebee (moving from session to session) or a butterfly (having spontaneous conversations).
- 5. Session reports** Someone at each session volunteers to make notes and prepare a handwritten or computer-generated report, which is displayed under a sign saying 'Session Reports'. The large group reconvenes at certain points and at the end of the forum to make announcements and share information.
- 6. Action planning** The Open Space meeting often includes an action planning session during which the participants prioritise action points and form self-managing action teams to implement high priority projects. Projects emerging from the forum are monitored and co-ordinated by the co-ordination team, composed of the co-ordinator of each project team, plus a member of the formal leadership team, which keeps all interested parties updated on the progress of the projects.
- 7. Reflection** The forum ends with a plenary session in which people reflect on the meeting. Each participant leaves with a complete set of session reports.

Who has used Open Space meetings?

Open Space meetings have been used by organisations and communities throughout the world, in many different countries including France, Germany, Ireland, the Netherlands, Oman, Slovenia, South Africa, UK, USA and Venezuela.

Martin Leith has helped many organisations in Europe and the Middle East to use Open Space, for a wide range of purposes.

These organisations include:

Central Sussex Partnership (two NHS trusts and two health authorities)

Exploring how the services provided by two hospitals might be integrated to the satisfaction of all parties

Cabinet Office

Part of the UK government modernisation programme

Department of Health

Workshops within a national conference on human resources management

The Engineering Council

Annual conference

Guinness Ireland Group (now Diageo Ireland)

Connecting with customers

Home Office - National Police Training

Strategic conference on the future of police training (a catalyst for the reinvention of Bramshill Police Staff College as CENTREX)

ICI Melinex

Cross-functional collaboration

Nederlandse Spoorwegen

(Dutch Railways)

Strategic planning and complex problem solving

Petroleum Development Oman

Working collaboratively to solve a complex technical problem

PricewaterhouseCoopers

Strategic planning

Prudential UK

Creating a community of practice

Rank Hovis McDougall

Cross-business exploration of the concept of brand stewardship

Shell Technology

- Creating a joint research programme
- Exploring Shell's business principles
- Agreeing new ways of working

Some testimonials

Open Space enabled a large cross-functional group from Guinness Ireland (now Diageo Ireland) connect with Dublin beer drinkers and uncover new insights about what makes a great beer and great brands. Its strength is that people spend time working on the things that matter to them, rather than the organisers.

Peter Nash, Head of Development - External Affairs, Diageo Ireland

Thank you ... for your effort, organisation and inspiration ... the Open Space exercise has been a great success in both generating ideas and starting to shift the company culture and perception of idea/product development. Many thanks for your valuable input. I look forward to working on ideas together in the future.

Jo Warnock-Horn, former Marketing Manager, McCain Foods (GB)

As part of our plans to determine a new direction to meet the changing needs of a major multinational company, we made it a priority to engage everyone in developing a five year strategy and building support for a major relocation. Open Space played a vital part in this engagement process and provided an opportunity for managers and staff to voice their concerns, helping me to understand the needs of the organisation and enabling staff to express their needs and contribute their ideas.

Adam Lomas, Head of Global Learning, Shell International

Open Space is the only way I know of having delegates decide what it is that they want to talk about, as opposed to having an organiser decide in advance what's going to happen.

Jeffrey Hyman, Chairman, Food & Drink Innovation Network

Case study Rockport Company

On the morning of Thursday 21st October 1993, the Rockport Company, a subsidiary of Reebok International, closed for two days.

No orders were processed, no shoes were shipped, scheduled meetings were cancelled.

The head office was locked.

Except for a skeleton crew left behind to answer the phones, all 350 members of Rockport's workforce, including John Thorbeck, the company's president, and his senior executives, gathered in a cavernous warehouse for a two day meeting which had no agenda.

Harrison Owen stepped into the centre of the loosely-formed circle of intrigued participants to make his opening introduction.

Half an hour later his briefing was complete, and it was time for people to make their offerings it took a little while for things to get moving, but eventually one Rockport employee stepped forward, then another.

Within an hour, an energised group had posted dozens of issues on the wall: distribution, on-time delivery, customer service, excess raw materials.

Some topics had never before been acknowledged as issues of concern, such as women's perceptions of the Rockport environment, eliminating political games, overcoming "we vs they" thinking, getting rid of paperwork.

By the end of day two, 66 different sessions had taken place, with the number of participants ranging from five to 150 or more on the hot topics.

At one point during the event a security guard (who wasn't even a Rockport employee) happened to mention that he spent a lot of time on his feet and would love to wear the kind of comfortable shoes that Rockport made.

But his company would never buy them as they didn't go with the security company's uniform.

Why couldn't Rockport redesign the uppers to match the uniform? And so a new product range was born. Even if it were nothing more than an average performer in the market, sales would be around \$20 million per year.

At the planning stage of the Open Space meeting, Anthony Tiberii, Rockport's senior vice president and chief financial officer, had been one of its most vocal opponents he felt that the company could not afford to lose two whole shipping days.

After the meeting he changed his mind, and was easily able to justify the investment.

How to address people's concerns about Open Space meetings

it is natural and inevitable that people will have concerns and reservations when you suggest holding an Open Space meeting.

Open Space is relatively new, it appears to be unstructured (although this is not the case) and the results are unpredictable.

We have heard most of the concerns and objections hundreds of times and know how to answer them in a way that helps people feel sufficiently comfortable with Open Space to give it a try.

Here are some of the most frequently-asked questions and concerns, together with a brief answer.

Open space may have worked elsewhere, but we're different because we're [fill in the blank: accountants, german, marketing managers, middle aged people, disabled people, whatever]

This was recently described as the 'every raisin is different' syndrome.

Most of the organisations we have worked with have said something along those lines when we first suggested using Open Space, and in every case the Open Space meeting was a success.

The only time Open Space doesn't work is when the topic is too broad or too specific, the plans have already been formulated, there is desire to control the process, the achievement of a specific outcome is essential, the sponsor has a hidden agenda, or there is no commitment from management to support the projects that emerge.

And we have even known Open Space to work when some of those conditions have been present.

How can I make sure that certain topics get discussed?

The only way to do this is to get someone to agree to propose the topic beforehand.

There are two dangers here.

First, the person may decide to propose a different topic, or may prefer to take part in the sessions that other people have offered.

And second, the person may propose the topic as agreed, only to find that no one signs up for it.

So you really only have two options: either let go of your expectations or don't hold an Open Space meeting.

Many of the participants will have no experience of facilitating meetings will this be a problem?

It is rarely a make-or-break issue session conveners will almost always rise to the challenge and do a good job, regardless of their level of facilitation experience.

What if no one steps forward to offer a session?

In the entire history of Open Space this has never happened, and there's little likelihood of it ever occurring in the future.

What if people propose sessions that are unrelated to the theme?

Trust the process. People will only attend any session if they think it is a worthwhile use of their time.

What if someone proposes a session that's outrageous or taboo?

Most organisations have family secrets and undiscussible issues.

Open Space provides a safe space for these to be brought into the open and discussed in a mature way.

If a 'space invader' should try to hijack the proceedings the facilitator will gently intervene.

Sometimes the unexpressed fear is that one of the participants will stand up and announce something along the lines of: "I think that the chief executive should resign all those in agreement, please meet me in room 3 at 1130."

Yes, this is a possibility and the sponsors should be prepared for it.

But it is unlikely to happen and, if it does, people must be trusted to behave responsibly.

How will we ensure that the ideas are implemented?

This is one of the main challenges when using any large group intervention method.

We have designed an action planning process that works in the following manner.

Following the final round of Open Space sessions the large group meets to summarise and prioritise action points.

Participants then organise themselves into action teams and hold their first project planning meeting.

During this meeting each action team appoints a co-ordinator who is accountable to the sponsor (e.g. chief executive) for good stewardship of the resources that are made available.

All action team co-ordinators become members of the action coordination team which keeps track of developments and makes regular reports to all action team members and to the sponsor.

One of the co-ordinators is appointed 'co-ordinator of the coordinators', who provides the sponsor with a single point of contact.

If possible a member of the management team joins the action coordination team – not as its leader but as an equal member.

This is done to accelerate communication and to ensure that the projects receive the necessary levels of resources and management attention.

Structure of an Open Space meeting

This section consists of three parts:

Before the meeting

The meeting itself

After the meeting

Before the meeting

The planning group:

Defines the purpose of the Open Space meeting and agrees on an answer to the question: how will we know that the meeting was a success?

Sets appropriate theme: neither too general nor too specific.

Decides who to invite and issues the invitations.

The planning group typically consists of a member of the client organisation's leadership team, the person with overall responsibility for the Open Space meeting, the facilitator (who may be an external specialist), the person responsible for logistics, and two or three other people from the client organisation.

The aim is to get as much diversity into the planning group as possible.

The meeting itself

Participants gather for the opening plenary they sit in a circle, because everyone is equally a leader.

The facilitator states the theme of the event, describes the principles that underpin the Open Space meeting and explains what is going to happen.

Principles

Whoever comes are the right people.
(Participation is voluntary)

Whenever it starts is the right time.
(Inspiration doesn't recognise timetables)

Whatever happens is the only thing that could happen. (Let go of your expectations)

When it's over, it's over. (If there's no more to say, move on)

The law of two feet (or the law of mobility)

If you find yourself in a situation where you are neither learning nor contributing, it is your responsibility to use *The Law of*

Two Feet and go someplace else to use your time more productively.

Anyone who feels so inspired can offer one or more sessions (such as a presentation, workshop, discussion group or task force) by creating a simple poster showing the title of the session and his or her name, making a brief announcement to the whole group and choosing a time and place to hold the session.

The posters are fixed to the wall and participants sign up for the sessions that they wish to attend.

Much negotiating usually occurs at this point: conveyors offering sessions on similar topics may decide to join forces, and people may ask certain conveyors to retime their sessions to make participation possible.

Participants then self-organise and pursue what interests them, attending sessions or being a bumblebee (moving from session to session) or a butterfly (hosting spontaneous conversations).

Someone at each session volunteers to make notes and prepare a computer-generated report which is displayed under a sign saying "Session Reports".

The large group reconvenes at certain points and at the end of the event to make announcements and share information

At the end of the event everyone receives a set of reports from all the sessions, which often include action points.

There is sometimes an action planning session (see below) during which the participants prioritise issues and form self-managing action teams to implement selected projects.

The matrix of meeting times and places

The matrix, similar to the one below but much larger, is taped to the wall in a prominent position:

| | Mars | Saturn | Jupiter | Mercury | Venus | Pluto |
|------------------|------|--------|---------|---------|-------|-------|
| 10 ⁰⁰ | | | | | | |
| 11 ³⁰ | | | | | | |
| 14 ⁰⁰ | | | | | | |

Each cell contains a Post-it Note:



When a participant posts a session, he or she chooses a time and a place, removes the relevant Post-it from the matrix and attaches it to his or her announcement poster. This procedure not only lets people know where and when the session is being held; it also indicates that the room is taken for this time slot.

After the meeting

Projects and actions emerging from the meeting must be monitored and coordinated, and their current status communicated to all interested parties.

A strategy must be in place for maintaining momentum.

What happens after an Open Space meeting

Martin Leith has designed a seven step **action teams method** that he regularly uses after the final round of Open Space sessions to ensure that the projects emerging from the Open Space meeting have the best possible chance of success.

The action teams method gets the projects onto the formal business agenda, creates a direct link with the organisation's resource allocation process and ensures that the projects receive ongoing management attention.

The action teams method consists of seven steps and two handouts:

- Step 1: Summarise actions
- Step 2: Prioritise actions
- Step 3: Formation of action teams
- Step 4: Inaugural meeting of action teams
- Step 5: Presentation of action team decisions
- Step 6: Inaugural meeting of action co-ordination team

Step 7: Closing circle

The two handouts are:

Handout 1: Agenda for inaugural meeting of action team

Handout 2: Agenda for inaugural meeting of action co-ordination team

Step 1: Summarise actions

The large group sits in a circle and a volunteer from each Open Space session announces the actions and projects that emerged from the session.

The facilitator lists them on flip chart paper.

A management representative, who has participated fully in the Open Space meeting, points out any projects that are clearly 'no hopers' so that the group can consider withdrawing them.

Time required: 15 to 30 minutes.

Step 2: Prioritise actions

Participants use sticky dots or Metaplan or Neuland sticky hearts (five to ten per person) to indicate the tasks and projects for which they have the most energy for following through.

The purpose of this activity is to identify a small number of hot projects to which everyone, management included, is able to give their full support.

Time required: 15 to 30 minutes.

Step 3: Formation of action teams

Following the prioritisation session participants organise themselves into action teams.

Each action team appoints a co-ordinator who, on behalf of the team, is accountable to management for good stewardship of any resources that may be made available.

Time required: 10 minutes.

Step 4: Inaugural meeting of action teams

(See Handout 1 for briefing notes)

The action teams meet to decide the following:

The goal of the project and the target completion date.

Roles and responsibilities.

The key challenges the team faces in achieving the goal.

The critical resources required to achieve the goal.

The main steps, including the next step (by whom and by when).

Time required: 20 to 45 minutes.

Step 5: Presentation of action team decisions

This is a plenary session in which each action team presents its decisions.

The management representative says how any resourcing issues will be addressed.

Time required: 2 to 5 minutes per action team.

Step 6: Inaugural meeting of action co-ordination team

(See Handout 2 for briefing notes)

All action team co-ordinators become members of the action co-ordination team. The purpose of this team is to monitor progress and keep everyone informed of what's happening (and what's not happening).

At this first meeting, which takes place in a 'goldfish bowl' format, the co-ordinators decide:

Which of them will be lead co-ordinator (acts as focal point and 'chief whip').

How and when they will communicate with each other.

How they will keep everyone informed of overall progress (everyone = action team members and the rest of the organisation, including management).

'Goldfish bowl' format:

Everyone except the action co-ordination team sits in a circle, in total silence.

The action co-ordination team holds its meeting in the centre of the circle, witnessed by the members of the silent circle.

There are two reasons for using this format:

1. It saves a lot of time.
2. It has symbolic significance – the co-ordination team is openly voicing its commitment to keeping everything moving forward.

A member of the management team is invited to join the action co-ordination team as an equal member (not its leader).

Time required: 15 minutes.

Step 7: Closing circle

Participants sit in a circle and share their reflections on the day.

A talking stick may be used if this is considered appropriate.

Time required: 30 to 60 minutes.

These are the two handouts that Martin Leith uses:

Handout 1: Agenda for inaugural meeting of action team

1. Appoint a timekeeper.

Time available for this meeting: 45 minutes.

2. Appoint a co-ordinator.

Co-ordinator's main responsibilities:

Co-ordinate the activities of the action team.

Make regular reports to the lead co-ordinator (this role will be explained later) about the project's progress .

On behalf of the team, be accountable to management for good stewardship of any resources that may be made available.

3. Agree the following:

The goal of the project and the target completion date.

Roles and responsibilities.

The key challenges the team faces in achieving the goal.

The critical resources required to achieve the goal.

The main steps, including the next step (by whom and by when).

4. Get ready to make a brief presentation of your decisions.

This will be made by the co-ordinator and will take no more than two minutes.

Handout 2: Agenda for inaugural meeting of action co-ordination team

All action team co-ordinators become members of the action co-ordination team.

The purpose of the action co-ordination team is to monitor progress and keep everyone informed of what's happening (and what's not happening).

Agenda

Appoint a lead co-ordinator. The role of the lead co-ordinator is:

To ensure that reports of progress across all action team projects are distributed regularly to all interested parties (including management and those who did not take part in the Open Space meeting).

To act as a central point of contact.

Agree how and when you will communicate with each other.

Decide how you will keep everyone informed of progress across all action team projects.

Invite a member of the management team to join the action co-ordination team as an equal member (not its leader).

Your first communication task is to inform everyone of your decisions.

Time available: 15 minutes.

How to create an Open Space meeting

Getting started

Before organising the logistics of the Open Space meeting you will need:

A planning group which:

- Defines the purpose of the Open Space meeting and answers the question: how will we know that the meeting was a success?

- Sets appropriate theme: neither too general nor too specific.

- Decides who to invite and issues the invitations.

The planning group typically consists of a member of the client organisation's leadership team, the person with overall responsibility for the Open Space meeting, the facilitator (who may be an external specialist), the person responsible for logistics, and two or three other people from the client organisation.

The aim is to get as much diversity into the planning group as possible.

A clear purpose ('Why are we holding this Open Space meeting?') and an answer to the question: 'How will we know that the event has been successful?'

An inspiring title – neither too general nor too specific.

Potential participants (conduct a stakeholder analysis).

A suitable venue that includes:

- A large room with plenty of blank wallspace that will accommodate participants seated in a circle; ideally it will have windows and daylight.

- A number of smaller meeting spaces (100 participants will need about 10 areas for people to meet).

- A space to use as the news room (could be

- part of the large room).

Well-designed and suitably-worded invitations.

An experienced Open Space practitioner to guide you through the preparations and lead the event (normal facilitation skills are not sufficient here).

A way of monitoring and co-ordinating the projects and actions that emerge from the Open Space meeting, and a way of communicating progress to all concerned.

The commitment of top management to holding the Open Space meeting and supporting the actions that will emerge from it.

Logistics

Here's a detailed checklist for planning an Open Space meeting.

1. Before the meeting

Check the venue: is plenary room suitable?

Is there plenty of blank wallspace in plenary room?

Is it OK to attach papers to wall of plenary room?

Will a PA (amplification) system be needed?

Are there any restrictions, such as no music, dancing, etc?

Is it OK to have background music in the plenary room?

Are the breakout rooms suitable? Do they have names? Is there a diagram showing their location?

- What other spaces can be used (eg lounge, bar, jacuzzi, etc)?

- If the rooms do not have names, you will need to name them. You could name them after planets (Saturn, Venus etc) or exotic-sounding cities (such as Amsterdam, Tokyo, Madrid).

If computers are to be used, where will they be sited?

Think about the registration process.

Check power supplies.

Is it OK with the venue to put up signs in the corridors, on doors and so on?

The venue

Brief the venue: make sure they know what's going to happen, get their support and tell them how you want the rooms set up:

- Plenary room to have a circle of chairs –

concentric circles if necessary (note: circle, not a horseshoe).

Overhead projector (OHP) or data projector and screen to be available but hidden from view.

A few tables placed next to the walls (for resources, etc).

Flipchart stand in each breakout room – plus, if appropriate, in other areas mentioned above (any constraints?).

How many flipchart stands can venue provide?

Tea, coffee, hot water, soft drinks – either constantly available, or very flexible arrangement.

Confirm arrangements for meals (maximum flexibility for lunch).

Photocopying facilities (make sure you know the procedure).

Fruit to be available all day, including bananas if possible.

Make arrangements for delivery of equipment.

Who will be your main point of contact on the day?

Equipment

Flip chart stands – one per meeting space (including group room)

Overhead projector and screen (if required)

CD player

Computers

Computer printer

Filing tray for session reports

Electrical cable with sockets

Talking stick or similar

Matrix of rooms and timeslots, with prepared Post-it Note coupons that people will put on their posters

Flipchart sheet with four principles of Open Space:

Whoever comes are the right people

Whenever it starts is the right time

Whatever happens is the only thing that could happen

When it's over, it's over

Flipchart sheet: *Remember to use the law of two feet*

'Convenors please note' sheets (one for each meeting space), text as follows:

As convenor it is your responsibility to ensure that:

The session happens, or people are told that it has been withdrawn.

The session has a facilitator (probably you)

There is a sign on the door showing the title of the session

Someone writes a report of the session and places it in the designated location

Sign saying 'Session reports' – A3 or A4 size

Hole punch

Scissors

Cutting tool (scalpel, Stanley Knife or similar)

Long ruler for preparing matrix

Stapler

CDs / audio cassettes

Camera

Vase of flowers to put in centre of circle (optional)

Consumables

Floppy disks

Flip chart pads – one per meeting space, plus at least two spares

White paper, A3 and A4

Flip chart pens (not whiteboard markers), various colours, 50 – 100 depending on number of participants

Ordinary pens

Box of OHP (overhead projector) film

OHP pens

Personal programme sheets

Session report forms (if applicable)

Report binders (if applicable)

Sellotape (Scotch Tape / Durex)

Masking tape (wide, if possible)

Pritt or similar glue

Blu Tack (= sticky blue stuff for attaching papers to walls)

Packs of coloured pens, many different colours in each pack, the type that children use

Post-it Notes (square if possible)

Roll of white paper, 15 metres wide (e.g. Fabriano Accademia 120 gm2)

Staples

Badge making materials (if applicable):

Coloured card

Safety pins

Other (eg decorations such as stars)

Film for camera.

Sticky dots, one pack (usually 200 dots per pack) of each of the following colours: red, blue, green, orange.

Metaplan / Neuland sticky hearts and flashes (if required).

2. On the day

Plug in the CD player and have some inspiring music playing as you set up the room

Arrange chairs in a circle, or in concentric circles; leave a few gaps so that people can move to the centre of the circle

Attach posters to walls

Attach matrix of times and places to wall

Allocate some wall space to session reports

Set up public address system (if necessary)

Flowers in centre of circle (if appropriate)

Quantity of white paper (A3 or A4) in centre of circle

Large quantity of marker pens in centre of circle

Prepare each breakout room:

Sign on door showing name of room

Flipchart stand and pad

Several sheets of white A4 paper (for door signs)

Blob of Blu-Tack (see above) or length of masking tape

Blank session reports one for each session plus one spare

Marker pens

'Convenors please note' sign (see above)

Set up the news room computer(s), printer, tray for session reports

Set up the registration table and/or the badgemaking table

Jug of water and glass for the facilitator

And that's it - you are now ready to lead people into Open Space.

Open Space resources

Websites

Harrison Owen: <http://ho-image.com>

Open Space general information:
www.openspaceworld.org

Open Space training information:
www.openspaceworld.com

Open Space UK: www.openspaceuk.com

Open Space Institutes

In the summer of 1996, Harrison Owen, originator of Open Space Technology took a trip across North America. During that trip, he discussed with several groups of colleagues the idea of an Open Space Institute. He told them that he saw an opportunity to experiment with creating an organisation based on the spirit of Open Space.

People in Toronto and Seattle took him up on the idea.

Two Open Space Institutes were born – one in Canada and one in the United States.

More recently, institutes have been established in Austria and Australia.

The Open Space Institutes are involved in the following activities:

- Disseminating information about Open Space Technology through a website (www.openspaceworld.org).
- Publishing an online newsletter .
- Providing information about Open Space training programmes.
- Organising and promoting the annual Open Space on Open Space meeting.
- Acting as a clearing house for stories about how organisations and communities have used Open Space Technology to good effect.
- Providing opportunities for mentoring.
- Serving as a focal point for the Open Space community in the respective countries.

The following Open Space Institutes are among those that are currently active:

- Open Space Institute of Austria
- Open Space Institute of Australia
- Open Space Institute of Canada
- Open Space Institute, United States
- Open Space UK (not an institute as such; www.openspaceuk.com)

Open Space email list

There is a very active and extremely useful email list that you can **subscribe** to by sending the message *subscribe oslist yourfirstname yourlastname* to listserv@listserv.boisestate.edu

The instructions are also available at <http://cispom.boisestate.edu/murli/openspace>

Postings to the list are **archived** at <http://listserv.boisestate.edu/archives/oslist.html>

In order to access the archive you will need to follow a simple procedure to get a password.

Books

Expanding Our Now – the Story of Open Space Technology. Author: Harrison H Owen. (1997 – San Francisco: Berrett-Koehler Publishers.)

Large Group Interventions – Engaging the Whole System for Rapid Change. Authors: Barbara Benedict Bunker and Billie T Alban. (1997 – Jossey Bass.) Alban and Bunker have been studying the field of large group intervention methods since the early 1990s and have compressed a large chunk of their knowledge into this excellent book.

Open Space Technology – a User's Guide

Author: Harrison H Owen. (1997 – San Francisco: Berrett-Koehler Publishers.) Detailed instructions for organising and facilitating an Open Space meeting.

The Power of Spirit

Author: Harrison H Owen. (San Francisco: Berrett-Koehler Publishers.)

The Spirit of Leadership

Author: Harrison H Owen. (San Francisco: Berrett-Koehler Publishers.)

Tales From Open Space (out of print)

Editor: Harrison H Owen. (1995 – Cabin John, MD: Abbott Publishing.) People who have organised Open Space meetings tell their stories. Contains 16 chapters, each covering a different Open Space case study.

How Harrison Owen came to 'invent' Open Space Technology

Back in 1982 a number of consultants taking part in an organisation development conference in the USA discovered that they were all using the phrase 'organisation transformation' to describe their work.

They decided to hold the first international symposium on organisation transformation the following year. Harrison Owen was a member of the organising team. 250 people from across the US turned up for the event, which was a major success.

The team had invited great speakers, arranged great workshops, booked a great venue and run a tight ship. But afterwards people said that what they had found most useful were the coffee breaks – the only parts of the symposium the team had not actually organised.

The symposium became known as OT1, and the following year a different group of people organised OT2, using a similar approach and achieving similar results.

Responsibility for OT3 was taken up by Harrison Owen. He remembered that OT1 had taken a full year to organise and was determined to find a better way of organising an event of this size and complexity. And he wanted to combine the self-organising nature of the coffee breaks with the kind of productivity that people experience in really effective meetings.

Open Space Technology was the result, and has formed the basis of OT conferences ever since.

Thanks to Harrison Owen's pioneering work, the method is now being used by an ever-growing number of organisations throughout the world.

Harrison Owen, originator of Open Space Technology

Harrison Owen is president of H H Owen and Company and the originator of Open Space Technology.

His academic studies focused on the nature and function of myth, ritual and culture.

In the mid 1960s he began working with a variety of organisations, including small West African villages, urban community organisations (both in the United States and in Africa), the Peace Corps, regional medical programmes, the US National Institutes of Health, and the US

Veterans Administration.

It was during this time that he discovered how to apply his knowledge of myth, ritual and culture to the development of these social systems.

In 1977 he created H H Owen and Company, a consulting firm specialising in organisational transformation.

He convened the first International Symposium on Organization Transformation in 1983 and continues to support the annual OT Conferences in the United States.

He is the author of nine books:

Expanding Our Now: the Story of Open Space Technology (Berrett-Koehler Publishing)

Leadership Is (Abbott Publishing – out of print)

The Millennium Organization (Abbott Publishing)

Riding the Tiger (Abbott Publishing – out of print)

Open Space Technology: a User's Guide (Berrett-Koehler Publishing)

The Power of Spirit (Berrett-Koehler Publishing)

Spirit: Transformation and Development in Organization (Abbott Publishing – out of print)

The Spirit of Leadership (Berrett-Koehler Publishing)

Tales From Open Space (Abbott Publishing – out of print)

Harrison Owen on 'The Ritual Practice of Open Space'

The ritual practice of Open Space is critical to optimum results.

This may be a strange notion, because for many people, ritual is a odd phenomena relegated to ancient esoteric cults, and certainly nothing to be admitted to polite, to say nothing of modern, society.

It is true, ritual has been with human kind since the beginning, and it may also be true that ritual is one of the things that marks us as being human.

Ritual is often linked with myth, as indeed it should be. And to understand ritual, we need to start with myth.

For most of us, myth is equivalent to "lie" or

untruth – as in “it’s all a myth”.

In truth, there may be precious little truth in myth – but myth lies behind truth.

It is deeper than truth.

In fact myth creates the context in which we perceive the true as true.

Myth is the story we tell to define the frame of reference in which we exist.

Religions employ ‘big’ myths (big as in many words) to establish the context of faith.

But groups of all sorts have their story of how things are around here.

And every time we enter a new group our first question is usually, “what’s the story?”

Formally put, we are asking something like, “what is the mythological framework in which we understand ourselves?”

Ritual, quite simply is acted myth.

It may be highly complex or very simple, but complex or simple, ritual sets the myth in motion.

In a word it is kinetic myth.

Or the dance of myth.

Done well, ritual is a powerful communicator.

Indeed a very simple, small motion can communicate a profundity of meaning.

For example the sign of the cross for Christians, the peace sign in the ‘60s – to name just two.

Open Space is laced with ritual.

Not by design – for no one, and certainly not me, set out to create a ritual drama, but that doesn’t not make it any the less a ritual.

The circle is a first and obvious example – and how we work in that circle, move in that circle, sit in that circle is a fundamental ritual activity characteristic of any Open Space. And when the ritual of the circle works, Open Space works – optimally.

I invite you to consider the ritual practice of Open Space.

What are the elements? How do we do it? Could we do it better?

Harrison Owen has worked with a wide range of organisations in many different countries including:

AT&T

Accor Hotel Group (France)

American Management Systems

American Society of Association Executives

American Society of Training and Development

Bank of Montreal

City University Business School (London, United Kingdom)

Congresso de Desarrollo Organizacional (Mexico)

Corporate Express

Dupont

Eastern Virginia Medical Authority

Ermetec Corporation (South Africa)

French Ministry of Telecommunications (PTT)

Gronigen University Business School (Netherlands)

IBM

Ikea (Sweden)

Jonathan Corporation

Lucent Technologies

National Educational Association

Organization Development Network

Owens / Corning Fiberglas

PepsiCola (Venezuela)

Presbyterian Church

Procter and Gamble

Rockport Company

SAS Airlines

Scott Paper

Shell (Canada)

Shell (Netherlands)

Shell Tankers (Netherlands)

Statoil (Norway)

Taj Hotel Group (India)

Telcel (Venezuela)

Toronto-Dominion Bank (Canada)

US Army

Us Forest Service

US Internal Revenue

US West

Union of International Associations (Belgium)

Young Presidents Organization

World Bank

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Related methods

Open Space meetings and the underlying methodology, Open Space Technology, are part of a group of methods with the rather cumbersome name of **large group intervention methods**

A large group intervention (LGI) is a large scale collaborative meeting or event taking place over one, two or three days. It enables members of diverse stakeholder groups to get together, often in large numbers (12 to 1000 or more participants) and with widely-differing needs and interests, to discuss issues of heartfelt concern, share ideas, pool their knowledge and develop plans for concerted action.

LGIs are typically convened to determine a shared vision of the future, craft a new strategy, decide how to implement an existing strategy, solve a complex problem, redesign an organisation or quickly develop a new product

Among the most widely-used LGI methods are:

- The Conference Model

- Future Search

- Open Space Technology

- Participative Design

- Real Time Strategic Change

- Search Conferences

- Simu-Real

Martin Leith has considerable experience of working with these methods and the principles that underpin them.

Resources

Large Group Intervention Methods website, www.lgimethods.com. This includes Creating Collaborative Gatherings using Large Group Interventions, a chapter contributed by Martin Leith to the Gower Handbook of Training and Development – Editor Anthony Landale, 1999, Gower Publishing. It provides a brief description of the main LGI methods and describes the common principles that underpin the methods.

About Martin Leith



Martin Leith is chairman and CEO of **Hothouse Meetings**, a company dedicated to creating Hothouse meetings for organisations in the private, public and voluntary sectors.

A Hothouse is a one-day business meeting in which stakeholders in an innovation, change or development project get together, often in large numbers and with widely-differing needs and interests, to explore the issues, share ideas, pool their knowledge and develop plans for collaborative action.

Benefits of a Hothouse

- All participants fully understand the project
- People spend the meeting working on aspects of the project that matter most to them
- Creativity and inspiration are unleashed
- Real collaboration occurs across silos and stakeholder groups
- Well-informed decisions are made
- Everyone owns the plan and is committed to delivering results quickly and effectively – people don't resist implementing a plan they helped create

for more information, please go to the Hothouse Meetings website (www.hothousemeetings.com) or contact Martin Leith at the address below.

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