

# **OSONOS V**

**Saturday, October 25 to Monday, October 27, 1997**  
**Holiday Inn on King,**  
**Toronto, Ontario, Canada**

## **OPENING MORE SPACE**

### **PROCEEDINGS**

- \* List of participants**
- \* Indexes**
- \* Reports**

#### **Co-facilitators**

**Larry Peterson, Open Space Institute of Canada**  
**Linda Stevenson, Open Space Institute Inc.**

**Honoured guest/participant**  
**Harrison Owen**

**Co-sponsored by:**  
**Open Space Institute of Canada**  
**Open Space Institute Inc. (USA)**  
**H.H. Owen and Company**

**Hosted by:**  
**Open Space Institute of Canada**

## The Chain of Wisdom

Note from Jody: You may remember that we began a paper chain at OSONOS which we hope to carry around to other events in order to build a "chain of wisdom". I was asked to take the sayings from it and replicate them for all to see..it is our hope they will grow over the years...

Dreaming together is the beginning of reality	Doing nothing
Freedom	Passion
Ask, and you will receive	Namaste
It is all here	Less is more
Le droit d'être et de jouer	Gardens are for your soul
Love	Sisters of seed
Honour our crones	Open Space is the learning system
Balance	Keep on keepin' on
Where I am is where I need to be	Enlightenment
Open Space is peace	Integrity
Sincerity...Simplicity...Serenity	Release, Receive
A sense of hope ☺	Serendipity
Open my heart...	So glad I [came]
Community	
Open Spirit	
Sensing "now" feeling "now"	
Kiss = Kekk	

\* Note re the topical index

The topical index was created as a "trial balloon" by Joan De New, who believes that our OSONOS proceedings might become a more useful reference as we continue to explore Open Space if the index were more "user-friendly." The groupings were ones which suggested themselves as being inclusive of related issues. Another year, we might want to include creating and naming these groupings in our OSONOS closing. It could be done fairly easily by inviting everyone to move the marketplace ads into usable clumps, and suggesting the overall headings. The numbering of headings is arbitrary, rather than prioritized. I wondered if there might be four groupings, similar to Chris Schloch's, but that didn't happen. Feedback would be appreciated.

# Opening More Space

October 25-27, 1997  
Toronto, Ontario, Canada

## Index of Reports as Submitted

- 1) OST Sales and Service
- 2) Open Space Institute Annual Meeting
- 3) Open Space as a way to Greater Consciousness
- 4) Open Space for Facilitating Organization Culture Change and Team Building
- 5) Making Connections Between Open Space and Cooperative Learning
- 6) How to use Open Space to Mobilize and Achieve Large Scale System Change
- 7) Public Open Space
- 8) The Dangerous Life of an Open Space-addict as Internal Consultant
- 9) Designing a Research Project on Sustaining Self-Organizing Communities
- 10) What is full-time, all the time Open Space in an organization? What is leadership, followership, ownership in an Open Space organization?
- 11) Dowsing as A Resource for Open Space Facilitators
- 12) Labyrinths and Open Space
- 13) Open Space and Open Space Technology
- 14) Opening an Industry-wide Conversation
- 15) Renewal Practices: Opening Body Space
- 16) Attracting Consulting Work in Leading Open Space Events
- 17) Mentoring Opportunities for Executives in Change
- 18) The Facilitator in Open Space Discussion Groups
- 19) Bounding Open Space Without Closing It
- 20) Open Space in a Re-engineering Environment
- 21) Dead Moose Society
- 22) What Does the Shaman Know That Could Help Organizations Heal?
- 23) Small Groups in Episode - Serial Sessions in Schools
- 24) Building Community on the Net
- 25) Nurturing leaders in ongoing Open Space organizations
- 26) Managing Volunteer Boards in Open Space
- 27) "Day 3" of Open Space
- 28) The Individual as a Self-Organizing System

# Topical Index of Reports \*

## I Practical Business Aspects of Open Space Facilitation (Nuts and Bolts)

- 1) OST Sales and Service
- 2) Open Space Institute Inc. Annual Meeting
- 16) Attracting Consulting Work in Leading Open Space Events
- 17) Mentoring Opportunities for Executives in Change
- 24) Building Community on the Net

## II Personal Growth and Spiritual Aspects of Facilitation

- 3) Open Space as a way to Greater Consciousness
- 8) The Dangerous Life of an Open Space Addict as Internal Consultant
- 11) Dowsing as a Resource for Open Space Facilitators
- 12) Labyrinths and Open Space
- 13) Open Space and Open Space Technology
- 15) Renewal Practices: Opening Body Space
- 21) The Dead Moose Society
- 22) What Does the Shaman Know that Could Help Organizations Heal?
- 25) Nurturing leaders in ongoing Open Space organizations
- 28) The Individual as a Self-Organizing System

## III Specialized Applications of Open Space

- 4) Open Space for Facilitating Organization Culture Change and Team Building
- 5) Making Connections between OS and Cooperative Learning
- 6) How to use OS to Mobilize and Achieve Large Scale System Change
- 7) Public Open Space
- 14) Opening an Industry-wide Conversation
- 20) Open Space in a Re-engineering Environment
- 23) Small Groups in Episode - Serial Sessions in Schools

## IV Ongoing Open Space

- 9) Designing a Research Project on Sustaining Self-organizing Communities
- 10) What is full-time, all the time Open Space in an organization?  
What is leadership, followership, openship in an Open Space organization?
- 26) Managing Volunteer Boards in Open Space

## V A Closer Look at Aspects of Open Space Workshops

- 18) The Facilitator in Open Space Discussion Groups
- 19) Bounding Open Space Without Closing it
- 27) Day "3" of Open Space

\* See explanatory note at the end of the list of participants.

# Opening More Space

## OPEN SPACE REPORT #\_1\_

October 26-27, 1997

**TOPIC:** OST Sales and Service

**LEADER:** Harrison H. Owen

**Participants: (please enter)** Leon De King (Recorder), Linda D. Cook, Diane Gibeaut, Dave Hasbury, Amy Cousineau, Bruce Wilthrow, Micheal Herman, Frederick Sheffer, Fran Olsen, Galena Coffey Lewis, Audrey Coward, Peter Thiss, Jackie Binkert, Winston Kinch, and Ted Ball.

### **SUMMARIZE THE DISCUSSION (Point Form):**

HHO: Two thoughts behind this breakout meeting:

1. How to sell Open Space Technology (OST); and
2. How to service the client's "after the Open Space Event" needs.

Rick: I'm having problems with your premises about the role(s) of organization executives.

HHO: I think OST functions like a biological Self Organizing System (SOS)(\*). What we're trying to do is to see what can be done to optimize the process.

(\*) See Stuart Kaufman. *Principles of Self Organizing Systems*.

Fran: Opening space is the basis of all therapy.

All closed systems are by nature terminal. Fear of losing control during, or as a consequence of, participating in an Open Space Event is a major OST sales problem.

Leon: We developed a "How close is this organization to OST in the way it's working Index. Foresaw using it as an OST, "the changes aren't as extensive as you might think," sales tool.

Jackie: Managers think of OST as a tool over which they will exert control.

HHO: Open Space is very much like a Trojan Horse.

Our "service" obligation is to help leaders cope with "the horse."

Galena: Open Space can't be successfully "sold."

But we can help organizations function in Open Space.

HHO: There is considerable research on the effects of OST. Evidently, all OST events have long range effects. Once you let the people out of the box (by inviting them into Open Space you'll never get them back in the box.

Rick: Sales and service of OST needs to address the managers' responsibilities for organizational efficiency and productivity.

HHO: Experience shows that managers need more to be warned of the exponential gains prospects of convening an Open Space Event in their organization.

David: OST events create opportunities to see Self Organizing Systems at work.  
Service = being willing to facilitate for them again.

Sales = stories. Stories are better than theory, especially stories that have parallels with the prospective client's organizational experience.

HHO: "Sales" and "service" are actually neutral concepts. They aren't necessarily mechanical, but can be much broader.

Winston: Leaders who are open will cooperate, and will influence those who've kept theirs closed, so far.

Michael: Service guide "What's Possible Now."

Bruce: Re manager's job, see "Manager's Job: Folklore and Fact," on the Harvard U web site. How things really happen is more important than how they're supposed to happen.

HHO: All systems are open. The "Open Space Laboratory" shows that individual productivity goes up in Open Space, as does the individuals' self images.

The differences between individuals and organizations are vastly overstated.

David: Let's not confuse what is with dysfunction!

HHO: Organizations that resist Opening Space in the name of economy can be helped if they can perceive that doing things in a different way might result in a budget surplus.

Fran: Many of us are addicted to the "drama dimensions" of our lives. See *How Can I Help*.

HHO: If "business" really did business the way they say they do, they'd be out of business.

Peter: In selling OST, it's better to focus on the organization's needs, that we're going to fill, than on how we're going to fill them.

## Conclusions/Next Steps

# Opening More Space

## OPEN SPACE REPORT #2

October 26-27, 1997

**TOPIC:** Open Space Institute (US) Annual Meeting  
(the affiliate incorporated in the US)

**LEADER:** Peggy Holman

**Participants: (please enter)**

Sheila Isakson  
Joelle Everett  
Michael Pannwitz  
Diane Brown

**SUMMARIZE THE DISCUSSION (Point Form):**

The group was convened to deal with the business of the OSI:  
Selection of officers, some policy questions.

We also discussed some basic questions such as how was the OSI formed and what's its purpose.

**How was the OSI formed?**

During the summer of 1996, Harrison came through several locations, including Toronto and Seattle bringing with him this idea of forming something called the Open Space Institute. His desire was pursued in both locations in different forms. In Canada, they registered as an association. (If you want more details, contact Birgit Bolton or Larry Peterson.) In the US, there were about 10 of us gathered discussing how to start. We decided we wanted to incorporate as a non-profit. Someone said they thought that it cost about \$700 to do this. Since there were 10 of us, we each put \$70 on the table and proceeded to create the legal entity. Thus our membership dues amount of \$70 was born from this meeting.

**What is the purpose of the OSI?**

At OSonOS in 1996, we brought this question to the people there. Both OSI(US) and Canada listened to what people said. The phrase "I want to have a place to send my friends" stayed with me to describe the spirit of what people wanted. What they talked about was having a place for

Mutual Support and Connection  
Learning and Research  
Mentoring and being Mentored

This has translated into activities that are in various stages of forming around:

Education and Training in OS  
Publishing  
"Clearinghouse" to connect with ideas and others (e.g., the web site, the e-mail list, contacts with others)  
Research

In our session today, we started by discussing assumptions, then answered some questions of policy

#### Assumptions of the OSI (US)

1. This is an experiment in what structure looks like in an Open Space organization. The boundary conditions are defined by the legal requirements of our non-profit incorporation: there must be a board with a President, Vice President, Secretary and Treasurer; we must hold an Annual Meeting. The principles and law of OS are the basis for testing.
2. The OSI's are a network of affiliates (don't know if that's the right term); we are connected by our beliefs, values and desire to work together.
3. As an experiment, every assumption is open to be tested. Test any proposed rule or structure with the principles and law of Open Space. Every time we discussed a need for structure, it tracked back to the principles and law of OS and didn't seem to need anything more.
4. What gets done is what people care about and are willing to act upon. It is not about needing everyone to agree. For example, we discussed that things supporting both OSIC and OSI(US) should be jointly funded. In practice, where we both see benefit, we have done so. (Although, we need practice in asking, because there are definitely more opportunities than we have taken advantage of.)
5. Participation is better than authoritarian leadership. Leadership comes from everywhere.
6. Financial decisions are based on the belief that the purposes of OSI will be served.
7. Financial decisions are open and shared with whomever is interested.
8. It is reasonable to pay someone for doing mechanics, logistics (e.g., managing the paperwork kinds of things like filing legal forms.).

#### Benefits of Membership

Why become a member? There was much conversation about inclusion, exclusion last year. The way we currently operate is that with the exception of a discount on the U S WEST Open Space video, whomever wants to participate does. The primary benefit of membership is knowing that you are contributing to sustaining the space for Open Space. For me, this is an act towards changing the world's consciousness of heart and spirit in who we are as individuals and in communities.

#### Responsibilities of Membership

Ironically, our conversation on benefits turned into a conversation on the responsibilities of membership: to find out what is going on and to communicate to others. For example, Michael talked about a meeting he could have posted on the web site. Several people talked about not finding out about meeting that were held, reminding us all of the responsibility to let others know and to ask. (Personal responsibility being so fundamental to OS)

#### Decision on Decision Making

In keeping with the principles of OS, whomever comes makes the decisions. It is based in the assumption that whomever cares and is willing to take responsibility are the best people to decide. Membership is not a pre-requisite for participation. E-mail is a primary

form for putting out questions that need decisions.

#### Role of Board Members

We identified 3 responsibilities:

1. Holding the space for Open Space
2. Act as a "board of trust" (ensure decisions, funds are used in keeping with the purposes of the OSI)
3. By law, there is a responsibility for the legal requirements of the OSI (is that redundant?)

#### Conclusions/Next Steps

##### Selection of Board Members

In keeping with the decision on decision making, the people who came to the Open Space Institute (US) annual meeting, made the following decisions. At this stage, selection of board members is a declarative process. It is people who care and are willing to take responsibility.

**Peggy Holman** has agreed to continue to act as President.

**Sheila Isakson** will play the role of Vice President.

**Diane Brown** will take on Communication (legally called Secretary).

Treasurer is still open.

During the evening news, we will ask for anyone who is interested in participating on the board to contact one of us.

##### Other Commitments

**Michael Pannwitz** agreed to act as a liaison to what is happening in Germany.

**Diane Brown**, with support from **Joelle Everett** and **Ellen Cohen** agreed to develop a kit to help people get started. It could include information on joining an existing OSI group, starting a new chapter (affiliate?), accessing the e-mail list.

**Peggy Holman** will set up a phone call among board members to determine what's next for us as a board.

**Open Space Reports  
OSONOS V - October 25-27, 1997**

**Report # 3**

**Topic : Open Space as A way to greater consciousness**

**Leader: Hugh Huntington**

**Participants: G.McCauley, J Cloughley, M Guyn, J Maris, V. Burt, A. Coates, K. Davis, C Baroo, S. Claire**

**B. Bainbridge, J. Meunier, J. Vogt , H. McCourt**

**M. Wheeler, L Bowers, B Peterson, W. Kuich, J Kuich, P. Kelly**

**Summary:** This topic explored OS as a way to enhance consciousness. Participants had various perspectives on consciousness. A listing of the key elements of the discussions follows:

We are taught to live within boundaries and to not explore the highs and lows. OS as us to explore outside the boundaries.

We need to "be" with the participants, not "do " for the participants.

Permission giving in OS will result in taking of responsibility by participants which often results in a new level of personal awareness if not consciousness.

Hang out with 3 and 4 year olds in order to experience chaos, and freedom of expression. Chaos awakens us to greater consciousness.

OS will teach us all humility when we get to our own edge of comfort.

Living in the fear of being out of control is a great teacher for leaders and participants of OS.

Our "dead moose" is often unspoken fear.

Open the space to allow the pain. Be willing to step into the pain.

Focusing our attention on pleasure will transform the pain we experience. Be cautious to recognize the difference between denial and stepping into new possibilities.

A model of change to follow is : discomfort to analysis to action to transformation.

Form and structure are key to OS. We live in a world of form and should be cautious to not represent OS as non structure; it is merely alternative structure.

Becoming conscious of ourselves is a major skill leading toward greater awareness of spirit, to greater depth of consciousness. If we learn to focus our attention on the nano second of feeling before our mind generates a thought will reveal to us the source of the thought and make us more aware of our body as a source of intelligence. It will also reveal to us that part of ourselves which needs to be seen or protected at that moment. For example, the one who need to be seen as competent when challenged; fear was the nano second of feeling.

A recommended book on consciousness is written by Richard Moss and is titled The Second Miracle. Richard is a former Md who has spent the last twenty years exploring consciousness.

**Opening More Space**  
**OPEN SPACE REPORT #\_4**  
**October 26-27, 1997**

**TOPIC:** Open Space for Facilitating Organization Culture Change and

Team

**LEADER:** Frederick W. (Rick) Sheffer

**Participants: (please enter)**

Caroline Stalhore, Stockholm, Sweden  
 Amy Cousineau, Kitchener, Ont.  
 Chuck Baroo, Bronx, N.Y.  
 Susan Nadon, Toronto  
 Kim Finckelstein, North York, Ont.  
 Barbara Feasby, North York, Ont.  
 Winston Kurch,  
 Buzz Block, Everett, Wash.  
 Mark Brubacher,  
 Ted Ball, Toronto  
 Ann Coates, Toronto

**SUMMARIZE THE DISCUSSION (Point Form):**

- importance of committed leadership in the org'n in which Open Space to be conducted. Where lack of supportive leadership represents a blockage, need to find a niche where the process can be applied, find a leader who may be open, and/or wait for a problem or issue for the opening. Some suggested that if management not prepared to accept the outcomes, don't do it.
  - CEO/leader's attitude important; can see process as one means of capturing orgn's energy or can frustrate process;
  - need for dialogue with org'n leaders to "take them on a journey of personal change that shows them that, regardless of Open Space, they are not able to control all outcomes of the organization"
  - Need to walk with, assure, and nurture leaders. Need to be cognizant of reality as perceived by org'n leaders resulting from the accountability systems by which they are measured. Most such systems have short term time horizons apart from rhetoric to the contrary and many serve to minimize risk-taking in unleashing the organization;
- need to answer the question "what trying to accomplish by use of the Open Space?" Need to frame the exercise around what trying to achieve as the question to be addressed by the process. ("what is the "business" reason to do it ?") Try to set the parameters within what is possible for the org'n to deal with;
- need for energized people to make it happen;
- garden analogy: "need to prepare the soil (cultivate, fertilize) and plant the seed";

- if organization depends on government funding, could be difficult for org'n to "stray" far beyond the parameters allowed by the funding;

### Conclusions/Next Steps

- **Open space is an applicable process to further goals surrounding organizational culture change, direction, and team building;**
- **Note comments in foregoing re. preparing the soil and setting the stage to enhance success.**

**Opening More Space**  
OPEN SPACE REPORT # 5  
October 26-27, 1997

TOPIC: Making connections between Open Space and  
Cooperative Learning

LEADER: Mark Brubacher

Participants: (please enter)

Judy Gast  
Diane Gibeault  
Chuck Baroo  
Peggy Holman  
Bruce Withrow  
Fr. Brian Bainbridge  
David Hasbury  
Michael Pannwik  
Leon De King  
Susan Nolan

SUMMARIZE THE DISCUSSION (Point Form):

- \* Mark opened discussion by sharing that he has been doing cooperative education with children for 15 yrs..
- \* cooperative learning is built upon the principle that "talk" is an important part of learning.
- \* teachers can set up small group opportunities for children to talk to each other
- \* then teachers can get out of the way
- \* Mark's wife introduced him to the ideas of Open Space and he felt there was a strong connection between the Open Space and Cooperative Learning

- \* the group members shared some reasons for coming to this gathering:
  - learning from analogous situations
  - experience using Open Space with College graduate students
  - wondering about the issue of children needing information from outside of their experience
  - wanting to explore "What are the conditions necessary for learning to take place?" (Challenged after learning of an "Open School" in Jerusalem)
  - ideas of Open Space are synonymous with Cooperative Learning
  - there must be another way to do education because so many are bored with the way that we have been taught
  - interested in the connection between the business view "the business of business is learning" and how we teach children

- \* Mark described 2 roots for his theory of education
  1. Story telling - when we talk and dialogue we stimulate learning, thinking and creativity
  2. Small groups allow this to happen best (groups of 2-6, with a group of 5 being ideal)

- \* Mark talked about the process of teaching Poetry that he uses
  - \* he pointed out that the Socratic method that had been taught leads students to believe that they require a "teacher" to be the mediator for them and that they don't feel they can interpret poetry without the mediator

- \* The process:
  - the whole class hears the poem
  - small groups set up to read the poem again
    - give a first response to the poem, (say it so it doesn't get lost)
  - share ideas, identify ideas that there is consensus about
  - identify a group leader who will share with the class for further discussion

\* Our group then discussed some general issues

- ways to get at the information that students don't have because it is not in their base of knowledge or experience
- a suggestion that the group identify information that they don't have as "next step" research
- the importance of balance between structure and experience was noted
- "open" can sometimes be interpreted as unstructured and can lead to chaos as an outcome
- Open Space is a pretty clear structure
- finding clarity about the themes that "bound" the space can help the learning be more fruitful
- sometimes the "theme" is implied but nonetheless present
- we can open up the learning by identifying the 2nd order theme which has a question either explicit or implied such as "Opening more space" or "How can we open more space?"

#### Conclusions/Next Steps

## Opening More Space

### OPEN SPACE REPORT # 6

October 26-27, 1997

**TOPIC:** How to use Open Space to mobilize and achieve Large Scale System Change

**LEADER:** Linda Cook

**Participants: (please enter)**

Marcelene Anderson, Diane Blair, Marlene Blum, James Cloughley, Ann Coates, Barbara Feasby, Francis Friedman, Kim Finkelstein, Sheila T. Isakson, Susan Nador, Becky Peterson, Geri Popadak, Frederick (Rick) Sheffer, Paul Tremlett, Jay Vogt

**SUMMARIZE THE DISCUSSION (Point Form):**

*SUGGESTIONS*

Work with the sponsoring body/organizing team to pre-select "themes" for a Large Scale Open Space based on needs and current issues

At the Open Space, allow participants to self-select a "theme" for the open space they wish to participate

Predetermine, are people there because they want to be there? If not, allowing them to self-select a "theme" to attend gives them a "choice."

Conduct concurrent Open Spaces

Collectively harvest what comes out of each open space – generate one report of all Open Space proceedings

Identify what you wish to try to accomplish with what comes out of Open Space

Harvest what's been accomplished given people must go back to "structure"

Take a few things forward – things *most common* to all (not priorities)

E.g. 5 common things – conduct open space on each

Establish set of own principles

Identify what people have "discovered" through the Open Space"

Help the organization "learn"

Articulate to others what's happened

Potentially, create an online networking capability (e.g. partnership website) for ongoing Open Space discussions

Seeds may be planted to localize activity as part of next steps / follow up

## OPEN SPACE TO SUPPORT LARGE SCALE CHANGE (Discussion Comments)

### *ENABLERS*

Provides capability to deal with complexity simultaneously

Enables you to explore ways to work as a community in a non-traditional way

Open Space works when you have conflicting views, disparity in how to view things and do things

Open Space creates a safe zone to explore new ways of dealing with chaos in a non-linear fashion

Enables the whole system to participate by choice and participate in an emergent process

Enables cross-functional / cross-pollination up, down, and across the company

Open Space experience is so powerful, people believe there's nothing they can't do, no problem they

can't solve. Facilitates teamwork and communication which enables breaking down chimneys, walls

For broad change, there is a higher need for convergence given pressures for decisions to be made,

work to get done. Questions need to be more precise to facilitate actionable work to occur

### *PARADOX and CONSIDERATIONS*

How to make Open Space work in systems that seem to be so much command and control?

People function under norms of rationality – periods of uncertainty

Open Space can be at a disadvantage if you leave things too open for too long

Question: How to converge without closing the space down?

Musical chairs add complexity to the whole process – changes in management and leadership significantly impacts "Truth"

As you move down the hierarchy, social interaction increases significantly

Real efficacy exists at the operational level – need to put more "green lights" on the highway versus reds and yellows to enable people to open space for thinking, working, exploring possibilities

### Conclusions/Next Steps

There are more questions than answers! There is great opportunity to Open More Space!

*Consider:*

"WHAT'S THE DIFFERENCE THAT MAKES THE DIFFERENCE?

"What do we say to who, at what time, and how, that will make the difference."

"When's that moment of truth?"

"What are the core values of people at the top?"

"What does the board, chief executive believe?"

**Opening More Space**  
**OPEN SPACE REPORT #\_ 7**

**October 26-27, 1997**

**TOPIC:**

**Public Open Space**

**LEADER:**

**S. Claire, Santa Cruz, California USA**

**Participants: (please enter)**

<b>Linda Stevenson</b>	<b>Lansing Michigan</b>
<b>Janet Mains</b>	<b>Toronto</b>
<b>Diane Gibeault</b>	<b>Ottawa</b>
<b>Fran Olsen</b>	<b>Montreal</b>
<b>Jody Orr</b>	<b>Caledonia, Ont.</b>
<b>Michael Herman</b>	<b>Chicago, Illinois</b>
<b>Francis Friedman</b>	<b>N.Y. N.Y.</b>
<b>Gwen McCauley</b>	<b>Ottawa, Ont.</b>

**SUMMARIZE THE DISCUSSION (Point Form):**

When you offer an open space to the public, not within the context of an on-going organization or community?

C. How to focus a temporary community? ASK?what are the hot issues? The concerns will manifest the organization. Focus on their common concerns, and they will come.

C. Four criteria for open space

1. So complex no ONE can figure it out
2. Parties are diverse (who else cares about this? Invite all stakeholders.)
3. Conflict (afraid to get them all in one room)
4. Decision time is yesterday

C. Start small? ?whoever comes is right.?

C. PROMISES: Every issue of concern will be on the table, will be discussed, will be a matter of record, prioritizable; can do action plans (at the end of the day, somethings need to be done). You will leave with a network of support; you are not alone.

C. Downplay the Open Space, almost a by-the-way. Focus on the issue, so ?observers? will have opportunity to actually experience OS.

C. Co-conveners (as in OST): come, bring friends, bring your spirit

C. You are not gonna control it; if you have an agenda, get rid of it

C. Conflict is constrained passion: keep increasing the space. The law of 2 feet allows people to back off and cool down. Permission to talk about what?s on their mind frees passion.

C. If the open space comes after a lecture or mass, the context will slow down the start of OS

C. Beware of space that obstructs circle; no limits to size except facility. Once that is determined

(circle can be four deep) then limit to the ?first 500 who register.?

C. Proportional representation (i.e. 40 elementary teachers, 40 secondary teachers, 30 principals, 10 school architects, 40 students, 40 parents) ?there are these many slots, first come, first-served.

C. Marketing: 5% return rate on direct mail: if you want 500, you mail to 10,000.

### Conclusions/Next Steps

November 17 in San Francisco, Gwen is putting on a public pre-conference; May 1997, Claire will offer a public event for educators in Monterey.

Opening More Space  
**OPEN SPACE REPORT # 8**  
October 26-27, 1997

**TOPIC:** The dangerous life of an open space-addict as internal consultant

**LEADER:** Michael M Pannwitz

**Participants:** Judy Gast, Mississauga, ON, Canada  
Gwen McCauly, Nepean, ON,  
Joelle Everett, Shelton, WA, USA

**SUMMARIZ THE DISCUSSION (Point Form):**

Being an addict limits what I offer as a consultant

Being an open space addict might limit the credibility of the internal consultant

What characterizes an open space addict?

**CONCLUSIONS/NEXT STEPS**

It's good to be an addict, keep that junk coming.

Keep giving up control!

Stick close to the problems of your organization, honor where they are at.

It's the only choice you have anyway!

## Opening More Space

OPEN SPACE REPORT #9  
October 26-27, 1997

**TOPIC:** Designing a Research Project on Sustaining Self Organizing Communities

**LEADER:** Peg Holman

**Participants: (please enter)**

Leon DeKing  
Sheila Isakson  
Ellen Cohen  
Bruce Withrow  
Fran Olsen

**SUMMARIZE THE DISCUSSION (Point Form):**

I called this session because the two most frequently asked questions I hear are: how do I get this started in my organization? And How do I keep it going? The latter question struck me as the more profound to pursue.

The underlying aspiration I have for this research is to create a new level of consciousness about our quality of life with love and spirit on this planet.

Our discussion ranged over a variety of subjects on doing research, what sustainability means, what self-organizing means. What follows are highlights.

We agreed that we were using the terms self-organizing and open system interchangeably.

**Principles of Sustainability**

Some principles we discussed were:

- \* Use a common enemy. This works for a while, but was not recommended!
- \* Learn how to bring new people into the organization as equal participants
- \* Intention stays clear for people
- \* When the budget is balanced, organizations decline; they are healthier when on the edge
- \* Pay attention to the triple bottom line: profitability, sustainability, social responsibility

**Principles of the Research**

Principles discussed included:

- \* Appreciative design: look for what's working
- \* Engage the Open Space Community
- \* End result useful for many types of communities: businesses, education, non-profits, government

- \* Needs to be longitudinal (a group may appear successful, unsuccessful at a moment in time; understanding what it's like at different points of time may be very revealing. An implication of the principle above on balance, to study only those organizations that see themselves as successful may be to catch them as they are heading into decline.)

### Purpose of the Research

The reason to do this research is to increase the odds of survival for self-organizing systems.

A secondary purpose is to better understand creating self-organizing systems.

Many of our examples are about wonderful events that regress when the leader disappears. Why are the organizations so fragile? How can we stack the deck towards sustainability?

An ancillary benefit: could lead to funding sources both by attracting organizations interested in the question and those who are attracted to the findings.

### Possible Research Questions

In no special order, these were some of the questions we were asking ourselves:

1. How do they define self-organizing? (e.g., achieving its goals, financially sound)
2. Over what time period has the organization operated this way?
3. What if it's sustaining itself but isn't healthy?
4. What is the impact of size? Is there an optimum size?
5. Is the configuration important? (physical, emotional, spiritual, intellectual; What's the role of circles?)
6. What factors contribute to being self-organizing?
7. How does the organization adjust to new pressures, conditions?
8. What keeps the organization vital, on their growing edge? What roles do truth telling, communication and trust play in this?

### Some Possible Organizations

Unitarian and Universalist Churches

VISA

Kiwanis

Co-housing

STS Roundtable

Walker, Richer, Quinn (a software company)

### Some Comments on the Role Size Plays

There was an example of termites who wander aimlessly pushing bits of fecal matter around until there is a critical mass. Then they "get their shit together."

Another example: the brain isn't present until there is a certain number of cells.

Some research on co-housing shows that 36 units is optimal.

### Some Other Reflections

\* Are there organizations that are "pure" self-organizing systems? Is it possible to be a mix of traditional and self-organizing?

### Process Design thoughts

- \* Listen; gather stories and anecdotes (use appreciative inquiry)
- \* Use content analysis to find the themes
- \* Among other lenses, assess through the lens of Open systems theory and chaos theory
- \* Develop a quantitative instrument (could be an end product -- a tool to help know what to focus on for sustainability. Could also be an extension to the research)

### Conclusions/Next Steps

Ellen Cohen has some research she has done that she will share.

Peg Holman is planning on pursuing a research project if you want to discuss this.

## Opening More Space

Report # 10

October 25-27, 1997

Topic: What is full-time, all the time Open Space in an organization?  
 What is leadership, followership, ownership in an Open Space organization?

**Facilitator:** Francis Friedman

**Other participants:** Susan Nolan, Kim Finkelstein, Susan Nador, Barb Feasby, Birgitt Bolton, Geri Popadak, Ellen Cohen, Diane Blair, Mark Brubacher, Marcelene Anderson, Caroline Stalhane, Jody Orr, Judy Gast, Joan De New (recorder), Amy Cousineau (valued bumblebee)

**Question:** Is it possible to maintain an organization in Open Space?

- Birgitt Bolton: yes! see her story in Tales from Open Space
  - since May, four small organizations she has worked with have committed to working in ongoing Open Space
  - remember that Open Space is here. How do we not get in the way?
- 1) **Determine the givens, or non negotiables**
  - could be laws of the land, history, hierarchical structure, reporting structure, procedure for emergency situations etc.
  - it is the myth of the organization what the givens really are
  - different levels see givens differently
    - very useful to lay perceptions of givens out for all to see
      - look at all together, simplify to common list
        - not more than one page long
        - give sheets out to all involved for reference
      - givens worked into intro to Open Space events
      - what if people don't agree with givens?
        - get them to post it as a topic in Open Space
          - allows discussion, clarification, even if no change possible

2) **Intentionality of holding space space open**

- people feel safe with "bounding"
- different view of leadership

3) **Find ways of posting issues**

- electronically
- "real" bulletin board

-givens, values, and assumptions are part of the first conversation  
 -ask about their interest in high learning, creativity

-Birgitt's experience was that things can percolate "too fast"

- mostly it was uncovering givens, so better that they be looked for and established before people get upset that their ideas cannot proceed because of the givens

**Question:** how can we encourage ongoing Open Space?

- include "problem solving" and "attitude" in review process for workers
- gives permission and encouragement to bring change issues up

- Birgitt gave example of a Mom and Pop shop needing to change
  - after Open Space, can no longer "blame" senior managers
  - it's hard to convert to Open Space ongoing
  - one person kept posting Just Do It meetings
    - no one comes
    - the person keeps on posting it anyway
    - the effect is that everyone is reminded of personal responsibility

- ongoing Open Space takes work
- expect lots of fear about the change
  - helps to talk about fear openly
- it's normal to find resistance

- Birgitt gave example of Open Space for a private school for economically deprived, exceptionally bright kids which wanted to operate in a different way
  - first three days of school an Open Space for kids, parents, teachers, staff
  - kids got into it well, parents got into it, staff freaked out at loss of control
  - senior management met later, upset to discover teacher resistance
  - Birgitt: important to trust the process
    - helps to have "others" e.g. parents in the mix
    - they were able to say things more objectively
    - helped avoid teachers vs kids situation

- need for in-course corrections in ongoing Open Space
  - raise question of how corrections will occur up front in the process
  - becomes an assumption they will be needed rather than a fear

- Jody: need to have real vigilance about "space invaders"
  - resistance can come from many places
- don't push Open Space if resistance is high
  - repeat: givens are very important
- Open Space event is different from ongoing Open Space
  - have to change to "being" from "doing"
- we need to find ways of providing support and protection for people taking initiatives for change cf Jody's workshop to come

**Question:** Is there a component of Ongoing Open Space needed to orient newcomers?

- Diane Blair's experience:
  - process of understanding the givens is the "vestibule" training

- gets newcomers started thinking about what approach is appropriate at a given time

**Question:** How do you deal with people who assent verbally without really changing?

- Jody: trust the process
- when truth telling is supported, people will identify problems

Holding the Space in Ongoing Open Space - Birgitt

- a team cannot hold space for each other
- someone needed who can recognize the violation of givens
- holding space is a hard job
- important that top people are committed to ongoing Open Space

Role of facilitator

- Francis Friedman reported on a 12-month intervention
  - he felt he "bounded" the change process
  - had built up personal trust with many over a period of time
  - he helped protect the time and energy needed for change, despite the heavy stress on regular work that this produced
  - high stress identified and recognized,
    - facilitator provided personal backup to the heavily stressed
  - in his mind, facilitation = bounding the space
  - holder of integrity
  - personal goal: to have them empowered
  - process called "democratic process" not labelled Open Space, though consistent with it
  - Francis plans to help them examine their process, then show them that they can accomplish the same ends more easily and quicker by using Open Space
- there is a difference between being the facilitator of space and manager of people

**Question:** How do people set the theme of Open Space?

- important to get a good topic for successful outcome
- Diane Blair:
  - size of group and length of time affects theme choice
  - shorter time, larger group works better with narrower theme
  - facilitators may have to "push" for narrow
    - can be done by posting the theme, discussing the theme in the introduction, and its need to be focussed

**Reference:** Angeles Arrien's *Four Fold Way*: show up, be present, tell the truth, let go

- it's OK to develop small areas of ongoing Open Space within larger organizations not yet ready as a whole

## Opening More Space

### Report #11

Report #11  
October 25-27, 1997

## Topic: Dowsing as a resource for Open Space Facilitators

Facilitator: Joan De New

**Other participants:** Michelle Cooper, Peter Thiss, Ellen Cohen, Joelle Everett, Janine Kinch, Fran Olsen, Diane Blair, Audrey Coward (note taker), Diane Thibeault, and two others (you know who you are, even if we don't)

- all people are capable of learning to dowsing**
  - a pendulum is a handy dowsing instrument
  - dowsing is really useful when you want a yes or no answer
  - there are appropriate and non-appropriate uses of the pendulum
    - ask: can I? may I? should I? and don't continue if any answers are no
    - Joan considers her pendulum a sacred tool which should only be used for good
  - some people charge for dowsing, but some don't. Some dowsers accept gifts or exchanges of service
- individual pendulum answers are never "correct"**
  - dowsers average 85% accuracy
    - you can never be sure whether any specific answer is in the 85%
    - consistent use of the pendulum, and checking answers out against reality where possible helps build user confidence
  - you have to be relaxed and prepared for whichever answer in order to expect a non-biased answer
  - you don't have to act on information given by the pendulum
  - an interesting second opinion
  - can take a "playful" approach, regard answers as "interesting" and worth exploring further
- can use pendulum to check self out as a facilitator**
  - centering
  - grounding
  - adding energy
    - pendulum sways while requests being answered
  - balancing chakras
  - aura repair
- can do the same for clients at a distance before meetings so they are in as healthy a space as possible
- some useful books of dowsing questions were available for consideration and purchase at cost from Joan (\$30 Cdn)
  - written by a wholistic chiropractor in New York State
  - cover topics of Health, Soul's Purpose (very interesting!) and Past Lives
- might be interesting and useful to develop a set of dowsing questions for use by Open Space facilitators**

**Opening More Space**  
**OPEN SPACE REPORT #12**  
**October 26-27, 1997**

**TOPIC: Labyrinths and Open Space**

**LEADER:** Virginia Burt

**Participants:** Diane Brown, Linda , Hugh Huntington, Mary Wheeler, Peg Holman, Atlanta Man, Janet Mairs, Lucy Bowers, Amy \_\_\_\_

**SUMMARIZE THE DISCUSSION:**

- history of labyrinths including the Chartes cathedral, The grace Cathedral as a simulated pilgrimage, moving meditation.
- believed to suspend conscious thinking and quiet the heart and mind.
- based on the spiral of life and may serve to energetically re-align
- Possibility of use of labyrinth as part of Open Space to prepare people for the opening...possible night before.
- sharing the trust that as one moves through the labyrinth, that they will come to the centre even though one moves away from the centre during the walking.
- examples of labyrinths in Boulder where the participants were requested to help to build and maintain it by contributing placement of a stone as well as the location both indoors and outdoors.
- discussion occurred about permaculture, Ridley Cottage and the power of place.

**Conclusions/Next Steps**

Labyrinths are able to contribute to activites around Open Space events.

**Opening More Space**  
**OPEN SPACE REPORT #13**  
**October 26-27, 1997**

**TOPIC: Open Space Technology and Open Space (or spatial landscapes and their ability to engender spiritual healing)**

**LEADER:** Virginia Burt

**Participants:** Janet Mairs, Lucy Bowers, Jody Orr, Michelle Cooper, Karen Davis, Marlene Blum, Peter This§ Atlanta man, Amy

**SUMMARIZE THE DISCUSSION:**

-presenting the context of landscape can have different meanings and be integrated with the medicine wheel. It can be a tool of understanding where people are at in their spiritual selves based upon their choice.

**Conclusions/Next Steps**

Many thanks to all attending and your wonderful contributions.

For further more detailed information, look for future publication. If you are interested please contact me via E-mail: [visions@interlynx.net](mailto:visions@interlynx.net)

**Opening More Space**  
**OPEN SPACE REPORT #14**  
**October 26-27, 1997**

**TOPIC:** Opening an Industry-wide Conversation

**LEADER:** Michael Herman

**Participants: (please enter)**

Gwen McCauley, Karen Davis, Jackie Binkert, (with Brian Bainbridge and Francis Friedman influences before and after)

**SUMMARIZE THE DISCUSSION (Point Form):**

The Challenge is to discover and emerge (if it exists) a valuable macro organization in an environment dominated by very distinct, self-sufficient and self-interested micro units. The industry-wide conversation might look a lot like large-system (e.g. Ford) change projects, with lines between the parts being very fuzzy or invisible to start.

Context: Michael is working with a small organization, currently funneling federal (U.S.) funds to small companies in order to promote increasing agricultural exports. The federal money is expected to run out in the next few years and they are trying to evolve into an industry-based trade association that could hold the space for an industry-wide conversation. Jackie just left Ford Motor Company, where she was involved in large-system change projects. Gwen is working with associations and wants to convene an industry conversation at some point in the next few years.

**Conclusions/Next Steps**

Core question seemed to be "Do the rules of openspace apply even when the stakes, the dollars and numbers of people get very large?" We think they do.

Gut instincts may get harder to justify when you're wrestling a whole industry or other large system, but they're still there and still valid, valuable.

There isn't one right answer, BUT there may be approaches that are wrong...i.e. they have internally inconsistent assumptions built in or are poorly informed or thought out enough...and if the approach is large, public and flawed, it may be a long time before we can try it again, for funding, public relations, or other reasons.

Starting point could be interviews, smaller local gatherings, or one giant event...as long you're as clear as possible about the issues and intentions and have some sense of how the conversation could unfold and grow beyond the first event and first participants.

Opening questions might include....

1. what are most important issues in this area (e.g. agricultural exports) for the future of the organization, the industry and the world
2. who do we need in the room/conversation to address these (and how do we access/include them)
3. what else is going on in the world that we should be paying some attention to

## Opening More Space

OPEN SPACE REPORT #15  
October 26 - 27, 1997

TOPIC: Renewal Practices: Opening Body Space

LEADER: S. Claire, Santa Cruz, California

Participants: Janine Kinch, Toronto

### SUMMARIZE THE DISCUSSION:

In order to hold the space, we need to be the space we want to create. That space makes it safe to experience whatever is, allow it, pay attention to what wants to unfold. To get centered, we can do certain practices that help us open to that presence.

We started by stretching, allowing the body to be tight just where it is, breathing and bringing attention to that place, allowing the place to relax and stretch and open. As we pay attention, we notice where else the body would like to move and stretch. We become aware of gratitude from the body for paying attention.

We did a sufi practice of "feeling the arms and legs," bringing awareness up one side and down the other, to create the holding environment to be present. We brought attention to the senses: what we hear, see, smell, touch, taste.

We also did a bit of tai chi, breathing with the movements, slowing down and being present. We did some energizing breath practices, and mirroring movements. How can we stay present when our attention is drawn out to another?

We ended with a bit of non-verbal dialogue with crayons on paper, which brought our awareness to the inner judge which was censoring certain activities. Opening space in the body naturally allows us to become aware of the chatter in the mind. This in turn can be allowed and let go into more space.

**CONCLUSIONS:** We each have practices which help center us; we just need to allow time and remember to use them. Jean Houston's new book *Passion for the Possible* outlines a sequence of moving from the body, to the mind/emotions, to the mythic, to the essential, as part of the path to meaning and bringing spirit into the world.

**Opening More Space**  
OPEN SPACE REPORT # 16  
October 26-27, 1997

**TOPIC:**

Attracting Consulting Work in Leading Open Space Events

**LEADER:**

Jay W. Vogt

**Participants: (please enter)**

Bruce Withrow

James Cloughley

Lucy Bowers

Susan Nolan

Gwen McCauley

Jackie Binkert

Judy Gast

Galena Lewis

Sheila Isakson

Ann Coates

Linda Cook

Marlene Blum

Marcelene Anderson

Becky Peterson

**SUMMARIZE THE DISCUSSION (Point Form):**

Major themes:

- How to overcome resistance
- How to attract business/marketing as state of being
- How to attract business/marketing as doing
- Paradoxes in open space
- What we mean by the business of selling open space

Here are some of the ideas which surfaced:

- Write review of "Expanding our Now" for publication
- Become a trainer of open space facilitators
- Have other OD tools to offer and offer open space only where it is needed

- Pick a specific market niche that needs these services and continue to market until resistance melts
- Practice an act of faith regarding competition
  - There is a lot of work to do to go around
- Trade work for paid expenses to go to conferences in the client's industry
- Send clients to events so they experience open space
- Show video of Bank of Montreal or US West
- Market to HR people who are bored with organizing the same old internal retreats
- Don't make a big deal of open space as a process; focus on the results (describe experience, don't label it)
  - Energizing people in exciting way
  - Creating focus and quick report
  - Build agenda out of felt needs
  - People get to choose what they do
  - Creates a high energy level
  - Accomplishes results in less time
- Tell different success stories for different folks
- Locate a champion who really wants to try it and support that person
- Monitor sources of influence in the buying decision
  - User: people who participate
  - Technical: internal content experts
  - Economic: financial decision maker
  - Coach: internal partner
- Sell traditional organizational development methodology and then critique its flaws with the client
- Use New York Times article for credibility
- Use At Work article with people
- Locate testimonials for use with people
- Introduce open space to individuals with whom you have a high degree of trust
- Read Selling the Invisible by Henry Beckwith
  - Thin book, easy to read, on selling intangibles
- Read Business as a Calling by Michael Novak on the spirit, rather than the process, of business

### Conclusions/Next Steps

A friend of mine in Spain worked at a firm in sales. Every now and then the owner would walk through the offices, waving his arms and yelling, "El dinero esta en la calle", meaning, "The money is in the streets!" So...Head for the streets! Abundant blessings to all!

## Opening More Space

Report # 17  
October 25-27, 1997

Topic: **Mentoring opportunities for executives in change**

**Facilitator/scribe:** Joan De New

**Other participants:** Susan Nolan, Audrey Coward, Caroline Stalhane, Leon R. De King, Ann Galley, Rick Sheffer, Linda Stevenson, Geri Popadak, Mary Wheeler, Ed Roberts, Paul Tremlett, Diane Blair, Marcelene Anderson (bumblebee)

**Question: Is mentoring a new opportunity for Open Space facilitators to consider?**

*Paul Tremlett*

- there is a difference between mentoring and coaching
- he and his partner have started to advertise executive coaching as a separate service
- recognition of loneliness at the top
- difficulty of thinking around the future without fear
- three hours every couple of weeks, or once a month
- provides safe space to talk ideas aloud
- Ed Roberts: time needed to identify problems
- finding the right words to communicate about change
- may deal with managing relationship conflicts
- management has a right to support
- fear factor of executive being seen as a "limited" person
- Paul treats information very confidentially
  - focus moves back and forth from personal stuff to corporate stuff
    - e.g. CEO talked over his own career choices, decided to resign
- OS community may be better equipped to pick up on these mentoring needs that OD facilitators offering other large group interventions
- Open Space events present opportunities for executive mentoring
  - different paradigm needs more exploration, familiarity
  - changing concept of leadership
    - pain in climbing the ladder in old model not dealt with, comes up
- everyone has the right to mentoring, not just the lower levels
- has had no trouble being paid by executives
- process of mentoring is a responsibility of management
- has found that giving the manager one up from direct responsibility for developing the talent pool below has been more successful than loading the manager with the task of looking for eventual replacements for him/herself
  - assess what mentoring is required, and arrange it
- mentoring encourages personal contact within the organization

*Rick Sheffer*

- individual relationship is the key to such counselling

*Susan Nolan*

- most executive coaches she knows are grads in psychology
- coaching is the hottest thing in the US now
- there are executive mentoring organizations
  - draw on a variety of mentors in the community
- NB Canadian government put out a call for management coaching services

*Leon De King*

- heard of a consultant group which meets weekly for lunch to share stories, plan together
- 30 different business associates offering various services work with them when needed
- overall coordinator
- reference to Bill Gates' Microsoft set-up, where people given opportunity to be creative, but also to share what they find, synergy created

**Question: How do you mentor people in a "virtual organization?"***Audrey Coward*

- happens now in informal consultations of entrepreneurs with other colleagues

*Leon De King*

- loyalty to place and organization are changing

*Audrey Coward*

- attitude that we are all self-employed, and have to take responsibility for our own careers another approach possibility

**Question: What about training for mentoring?***Paul Tremlett*

- most managers capable of doing it with current skills
- some managers offered training as requested

**Flat organizations offer a whole different challenge for mentoring.***Marcelene Anderson:*

- need to be clear on purpose of mentoring
  - know selves better
  - give feedback
  - skills, interests, values
  - sounding wall
- if you can't rise in the organization, how do you develop your career?
  - job enrichment: expanding current position
  - lateral move
    - mentor can help a person see the implications
  - leave the organization
    - mentor can help them determine when to go
  - search process
    - mentor can facilitate rethinking of career
  - mentors need to know these options

*Paul Tremlett: Career: implementation of a self concept through work*

- to do this you have to know your self better, mentor can help

**Mary Wheeler**

- works with career development within the health field
- career development not a "dirty word"
- sees a great connection between Open Space and individual careers

**Ann Thompson:**

- try Open Space as a life position
- it is a quantum leap
- then you can work backwards

**Three types of mentoring:**

- a) within familiar hierarchical structure
- b) with flat/virtual organizations
- c) CEO's

**Loyalty** is a two way thing between employee and organization

-Paul Tremlett: organizations cannot be loyal, only people

**Diane Blair (Bank of Montreal)**

- downsizing creates fear anyways
- offer employees a set of opportunities so they can choose to be eligible for the group which is not cut
- seems to reduce fear

Query from others: can fear be avoided as a motivator

**Problem that social contracts are broken****Rick Sheffer:**

- current struggle to restitch social fabric pieces
- sees OS can be used to help this process
- mentoring can help executives learn to deal with this brokenness

**Need to learn that it is OK to dissolve cohesiveness when appropriate so a new vehicle can be created out of the dissolution to deal with new issues**

**Leon De King**

- described "charm school" meetings once a week of military teaching staff
- how are we going to modify the training program for next week?
- noted by others: students not directly involved in the process

There needs to be some way that a subordinate can advise and support a manager.

**Mary Wheeler :**

- recent survey of employees' attitudes to manager as career coach
- most did not respect/trust manager if they hire and fire
- need external mentoring

**Question: Do organizational values come up in a mentoring discussion?**

*Paul Tremlett:* -weaves in and out

-discussion of culture which reflects values

*Rick Sheffer* - Is mentor some sort of conscience for values? Maybe.

**Resource book:** Kay Gilley, *Leading from the Heart: Choosing Courage over Fear in the Workplace*

- Joan De New met Kay Gilley at OSONOS III, feels approach consistent with OS
- recommends the book as a possible personal resource for OS facilitators, and a resource to offer executives seeking to change paradigms
- available from Joan for list price \$18 US or \$25 CDN plus \$3 CDN if ordered
- Geri Popadak: Kay's new book, *The Alchemy of Fear at Work* is due out soon

**Question: (Caroline Stalhane) What is happening re concept of leadership in North America?**

-in Sweden, everything is turned upside down, not flattened!

*Leon De King:*

- leader's responsibility to get things done
- prepare for future by flexibility
- goal to develop a self-sustaining organism
- ball stops with the CEO who is responsible to the Board
  - not only the current bottom line, but also future viability
- there is a difference between accountability and responsibility
  - responsibility could be shared
  - Open Space offers opportunities for responsibility and exercise of leadership skills

**Metaphor:** Passing the leadership baton (*Ed Roberts*)

-the next runner begins to run with you first before you pass it

-need a sense of team to know who to pass the baton to

*Paul Tremlett:*

- Executives more concerned about managing escalating complexity than managing change
- complexity in both workplace and personal life
- challenge to balance personal and professional lives

*Rick Sheffer*

**-public sector has a problem different from business:**

-no stock reports to monitor how well they are doing.

-sees challenge in engaging business community in addressing social needs

*Caroline Stalhane*

-300 people attended a public conference in Sweden's 2nd. largest city

- result was that the business community agreed to address social needs
- made use of graphics: lapel tags, worn in the community, advertised the efforts

*Mary Wheeler (Mississauga)*

- United Way board members teamed with company reps when they made their appeals within companies with good responses

*Suggestion by Paul Tremlett*

- close business for one day
- do an Open Space Conference on business community's responsibility to respond to social needs

*Rick Sheffer*

- 30% of Montreal's population lives below poverty line

Metaphor of concentric circles on the water

- what they forget to say is that the water has to be still when you start
- not the case in social issues

Opening More Space  
OPEN SPACE REPORT # 18  
October 26-27, 1997

TOPIC: Facilitation in OS discussion groups, dominants, introverts,...

LEADER: Diane Gibeault

Participants: Susan Nolan Georgia, Marcelene Anderson Toronto, Geri Popadak Michigan, Ted Ball Toronto, Caroline Stalhane, Susan Nader Toronto, Janet Mains Toronto, Barbara Feasby Toronto, Pat Kelly Toronto, Ann Stadler Seattle

SUMMARY OF THE DISCUSSION:

The Issue: In OS discussion groups, when conversation gets competitive and monopolized among a few, some participants (extroverts and introverts) indicated they close down, become angry and even leave. It is not obvious the discussion will take place again for them. When there is equal participation, even when highly dynamic, it is easier to contribute.

Suggested strategies:

- . In the opening circle of OS, the event facilitator, when explaining the process, can
  - a) say "in the discussion groups, the convener explains his-her issue and can invite people who showed up to also explain why this issue is of interest to them." (This sets an equal base and tends to reduce chances of dominant people taking hold of the space.)
  - b) indicate that "conveners do not have to be facilitators to convene a meeting, that the group self-manages and that all are responsible to create space for everyone. You just have to care about the issue." (Otherwise, some people exclude themselves feeling uneasy to facilitate.)
  - c) just before the Market Place, communicate the spirit of shared participation and say something like: "Go do good work!".
- . On the Report Form, add a line that is somewhat outstanding, saying: "We are all encouraged to make space for all".
- . In the group, when the discussion has been going on for a while, the convener or anyone else can ask if anyone else would like to share ideas (instead of asking a particular person and possibly making them feel cornered and embarrassed).
- . near the end, go around the table for comments, on a voluntary basis like the talking stick.

## 18.2

. respect that some people prefer listening. Let them be.

. respect that some people may have fears of retribution or other and that only they have the responsibility and the capacity to judge when they open up.

. the safer participants feel, more chances they might participate. The event facilitator has a responsibility to do the essential preparation work to the event to make it as safe as possible, ie ensuring OS is the appropriate approach to take, that leaders understand its implications and their role before, during and after the event.

Eg of preparation questions to the client . Meet with the management team and then with representatives of the organization "so that the whole community feels welcomed to the OS" and ask all to answer individually:

What is your intention or your version of the organization's intentions in holding an OS on... ?

What are your fears associated with these intentions?

What support do you need from this group so you can embrace both your intentions and your fears and so that the process or container is comfortable for all?

During OS, to keep the space safe, the facilitator should seek out the leaders and ask for eg. "How is it going?" to continue to help them to understand the process, what is going on and their role.

In morning or evening circles, even if the majority of participants are introverts or simply not speaking, even if a hot issue is boiling but remains unspoken, the facilitator should not go into a guided discussion. This would be a fixing approach that prevents people from being who they are and taking responsibility for their pain, their needs, their fears, their ideas, and growing when and how they are ready and able to do so. Silence is powerful. Let is work.

The discussion of facilitation, dominants, etc was over.

Another discussion followed on the difference between Open Space and other approaches and links between them.

**Opening More Space**  
**OPEN SPACE REPORT #19**  
**October 26-27, 1997**

**TOPIC:**

Bounding Open Space without Closing It

**LEADER:**

Jay Vogt

**Participants: (please enter)**

No record

**SUMMARIZE THE DISCUSSION (Point Form):**

By definition there is bounding in open space - without a boundary there is no circle. The art of bounding space in finding balance - too big and people flounder; too small and people feel claustrophobic.

Boundaries come in different forms

- Physical: the chairs, the space
- Spiritual: facilitator's preparation to be present
- Mental: presenting theme
- Heart: going beneath the theme to what has heart and meaning; what's at stake
- Givens: organizational constraints and conditions of safety
- People: who is invited and who is not

Activities to define boundaries can happen before and after the opening and closing of the space.

Bounding activities before:

- Defining everything mentioned above
- Especially management constraints and organizational givens
- If the constraints are too great, reconsider appropriateness of open space
- Making the unstated assumptions stated ones.
- Helping management define what "due diligence" they need to be able to support the emerging ideas of open space.
- Resolving dilemma faced by people with integrity: they want to authorize process if they know that the outcomes of it will be ones they can support, but no one can know the outcomes before the process is complete...

Bounding activities after, as part of convergence:

- Action planning
- Reflecting on what we have learned
- Creation of themes by multivoting
- Placing themes on grid (see article in At Work, 10/97)
- Public commitments by managers
- Providing pots of money to seed projects
- Integrating results into conventional performance planning and management structure
- Harvesting principles of what has been learned

**Opening More Space  
Open Space Report #20  
October 26-27, 1997**

**Topic: Open Space in a Re-engineering Environment**

**Leader:** Birgitt Bolton

**Participants:** James Cloughley, Amy Cousineau, Buzz Block, Ted Ball, Marcelene Anderson, Geri Popadak, Audrey Coward, Susan Nolan, Brian Bainbridge

**Discussion:** Birgitt described an organization that was in the process of a re-engineering effort that affected both the technology/machinery used in the organization (a significant retooling) as well as "re-engineering" work process. The corporation has recognized early in the process that top down "re-engineering" is not causing the changes needed, not causing the organizational change needed. They want to achieve a participatory, democratic process, bottom up and top down simultaneously. Birgitt was requesting input to the possibilities of using Open Space in this setting as well as inviting into a discussion about using Open Space in organizations that are into re-engineering efforts in general. The driving desire for the latter discussion was because most re-engineering efforts are failing, the cost to human beings is so high, and consultants such as ourselves are not brought in until after the effort is complete, and it is like going into a post-war zone. Birgitt posed the question wondering if we should keep walking away from companies that are "re-engineering" because we "know" that Open Space and re-engineering don't mix or whether we can go into these companies much earlier, maybe prevent some of the serious human harm with Open Space, and possibly even overthrow/reframe the whole re-engineering effort.

Some stats: of CEO's who employ re-engineering, 60% end up being fired  
: increases in mortality and morbidity are up 200-400% during the time of re-engineering  
: 70% of re-engineering efforts fail

First emphatic part of the discussion was that the only way to bring Open Space into the environment is to get rid of the re-engineering. Open Space could be the catalyst to drive out re-engineering and to liberate people from re-design processes.

Other points discussed:

1. Re-engineering only deals with the parts and not the whole of an organization. Open Space affects the whole. It is the whole that needs to be affected. The whole includes the external environment.
2. Feels like the old argument between Newtonian physics and Quantum physics.
3. Analyzing smallest parts (re-engineering) does look like it causes increased efficiency for a while but quickly disintegrates because the whole hasn't been attended to.

## 20.2

4. People input and equipping people for change needs to proceed the technological change.
5. Look at literature on socio-technical design. Deep slice design team across span to implement sequencing of interventions. There was discussion about viability of this in terms of organization wide change. Two differing views, one for and one no. If doing deep slice, don't forget to add "environment" to slice.
6. Pay attention to the external dimension ie: in this case politicians/users/suppliers
7. Attention to work system, social system, system within its environment.
8. If doing/using Open Space, at each Open Space, ensure that whole system is represented in the room at every Open Space. Ensure it is driven by Spirit/Story. Make point of whole system as a circle that is permeable with environmental factors, constant change. By drawing diagram of concentric circles and showing re-engineering as only one layer and that it is constantly being affected by the environment and change, can cause a company to look at their efforts with a different metaphor and hopefully do the shift from traditional re-engineering to whole system bounded by Spirit. Spirit becomes driver for change.
9. Teach organizations to live in Open Systems as a way of life.
10. Mid-management to have role as facilitators/ "servants" to their business units. They are to constantly read the environment for change. High entrepreneurial function. Need to be constantly "keeping up". They are suppliers to their unit of skills, knowledge, information.
11. Work-group needs to be redefined cross functionally.

Can it be done? We don't know.

Should it be done? We don't know that either. Feels a bit like having the ingredients for a molotov cocktail. However, we also expressed our anger and anguish at doing nothing and watching the price of life being paid.

**Opening More Space  
Open Space Report #21  
October 26-27, 1997**

**Topic: Dead Moose Society**

**Leader:** Birgitt Bolton

**Participants:** Chuck Baroo, Virginia Burt, Marlene Blum, Ann Coates, Karen Davis, Harrison Owen, Michelle Cooper, Lucy Bowen, Janet Mairs, Peggy Holman, Sheila Isakson, Pat Kelly, Dave Hasbury, Fran Olsen, Barbara Feasby, Anne Stadler, Joelle Everett, Mark Brubacher

**Discussion:**

The Dead Moose is the Dead Moose that smells, has flies buzzing around it and is known throughout the company, but no one ever talks about it, or tells the truth about it. It causes enormous problems in the organization. The Dead Moose Society was formed as a humorous but way to support looking at a very serious topic. By introducing the Dead Moose Society, it is permission giving for an organization, its executives etc. to look at and name truths, however painful. It is our experience that this has been very helpful both in bringing truth out very quickly in working with an organization and in supporting those who are trying to work with the truth, no matter how painful or difficult that might be. An invitation was extended to start Dead Moose Societies anywhere that Open Space is done. As a natural support for Open Space and a natural partner to Open Space. Open Space has the tendency to draw truth out in an organization, getting the Dead Moose on the table so to speak. We are finding that by introducing the concept of the fact that the Dead Moose might be identified and named in the Open Space right near the beginning, everyone is doing an AHA - here it is --as a response.

1. In mediation, this concept is that there are ping pong balls on top of the table, but bowling balls under the table and it is the bowling balls that are the ones that get you.
2. Whenever there is a high dream, the low dream always surfaces.
3. Love allows people to bring high dream and low dream into the room.
4. Humour allows the same. We then had a discussion about humour used well and not well. Be sure the humour comes from love, not fear.
5. Getting to truth is not a searching process, a linear process -- more often an AHA experience.
6. Important to name the truth that needs to be told, no matter how painful.
7. Truth is not an absolute. Everyone sees truth their way.
8. Introduction of the Dead Moose Society is saying to people, there is something here that no one is saying and that is a common enough phenomenon to have a society, but now is the time to get it out and you have permission and even if it is painful, we can laugh too.
9. Important to tell truth with intent to be kind rather than to hurt.
10. Sometimes the way to surface the Dead Moose is to recognize a difficult moment by saying "what just happened here?" and allowing for a pause in the action to reflect about it.
11. Open Space opens the space for humour to be effective. Humour allows us to transcend our differences.

21.2

12. One way that people express AHA's is through humour or storytelling. Our ability to make metaphor.
13. Always be prepared to be surprised.
14. Always be ready for change, hold to non-attachment to outcome.
15. Truth, humour, creativity, pain, .... all present in Open Space. Open to all in Open Space. The Dead Moose Society is a vehicle to help work with this.

And if you were in the group, you heard the STORY OF THE GREAT PUMPKIN (Harrison, Anne, Peggy, Birgitt's story) that demonstrated all of the above and more and was freeing to some of us. And then more pumpkin stories (Lucy's).

And if you were in the group, an important metaphor that was shared was standing naked next to the Dead Moose (David's Story)

And remember:

"If you don't have a sense of humour, it's just not funny".

**Opening More Space  
OPEN SPACE REPORT #22  
October 26-27, 1997**

**TOPIC: What Does the Shaman Know That Could Help Organizations Heal?**

**LEADER: Joelle Lyons Everett**

**Participants: Mary Wheeler, Ann Coates, Birgitt Bolton, Audrey Coward, Caroline Stalhane, Jody Orr, Michelle Cooper, Howie McCourt, Peter Thiss**

**SUMMARIZE THE DISCUSSION (Point Form):**

**We began by sharing shamanic practices which we use in working with clients:**

- Set my intent for an event ahead of time; meditate 24 hours ahead.
- Work with my body, practice staying firmly grounded, with a straight posture.
- In one case, I asked the group to look around the circle in the opening. Nobody did it (I later found that there was too much hostility in the organization). My instinctive response was to move even more than usual; I circled the room a few times.
- There are several thoughts about which way to circle, coming out of different traditions. Some go counterclockwise to open, clockwise to close.
- I hold a psychic space bounded by the four compass points, above and below.
- I walk the boundary with prayers for everyone.
- I send clear energy into the space ahead of time.
- I send blessings ahead, and when I meet people often feel that I have met them already.

**In addition to sage, which may be inappropriate or impractical, what can I do to clear the energy of the space?**

- Send energy, clear it imaginatively.

## 22.2

- Create an inviting environment with candles, flowers, the four elements. Be aware of the relative size of the group and the room--in a very large room I might set up in space that is framed by a corner.
- Adjust the lighting. If there are windows, some fluorescents could be turned off.
- Throw up a pyramid of energy above the group. Ask that a slump in energy be removed.
- Hold a vision of the big picture, the multi-dimensional view of life. I hold a vision of holdness as I work with therapy clients or mediation clients.

What inner work do I need to do this kind of work?

- I need to know my values, assumptions, what is underneath. I learn from my heard places and my joy--it's been a struggle for me to accept that I learn from the joyous times as well as the struggles.
- The tradition in shamanic cultures is that the learning process is so rigorous that it is like dismemberment. The initiation process dismembers the shaman, boils the pieces in a cauldron until the bones are bare and hollow. At the end, the shaman is reconstructed, but with bones of iron or quartz.
- We need yin and yang. Holding space, we hold room for both. We need to be grounded in both/and.
- In corporations, I ground the environment. This is a redefinition of the role of consultant.
- I don't have to do it all myself, from my own strength. I can receive what I need from Spirit.
- I have found that when I can stay present to the whole of my own life, the unpleasant as well as the joyous, the unpleasant is more bearable and even hard times have moments of unexpected joy and beauty. I think the same thing holds true as we work with clients who are in pain and conflict. By staying fully present, we hold a space for them to resolve their problems.

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Conclusions/Next Steps

**Opening More Space**  
**OPEN SPACE REPORT # 23**  
**October 26-27, 1997**

**TOPIC: SMALL GROUPS IN EPISODE-SERIAL SESSIONS IN SCHOOLS**

**LEADER: Fr BRIAN S. BAINBRIDGE**

**Participants: (please enter) Bruce Withrow, Chuck Baroo, Mark Brubacher, Michael Herman, David Hasbury, Joelle Everett, Leon De King, Karen Davis, Marcelene Blum, Sheila Isakson, Ed Roberts, Judy Gast**

**SUMMARIZE THE DISCUSSION (Point Form):**

- Small groups, one each four weeks for one hour at a time, presenting the structure at the beginning each time, putting up the topics - new and completed - each time, using the talking stick at the end of each session, presenting the outcome summary next morning to all participants (7), and a summary at the end of it all. It worked well for this staff of teachers at an elementary school in the first year of the school.

Quick process for problem addressing.

Good work done in a short time.

Highly interactive.

Report (written) is confirmation/justification for subsequent action.

Book of visions can be generated rather than just a vision.

Pre-written reports help nothing, really.

Use later sessions in an episode series as decision-making sessions.

Create the space each time by stating rules, etc.

OPEN SPACE works where other systems have failed - it engages people.

It becomes exciting, almost in spite of the participant attitudes.

It allows inventiveness to expose and grow.

5-6 seems to be the ideal number in a group.

Small staff are usually used to working in a small group - not intimidatory.

Quiet ones often listen well and are good at summarising.

Facilitator can sometimes help, caringly, to give everyone a chance to be heard.

## 23.2

# 23 / 2

Gender can effect the way things happen in group - maybe less of a problem in Open Space.

Talking stick can even be a healing exercise, sometimes.

Talking stick can be different if it is used sequentially or used on a "go and get it" mode.

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**Opening More Space**  
OPEN SPACE REPORT # 24  
October 26-27, 1997

**TOPIC:** Building Community on the Net

**LEADER:** Jody Orr

**Participants: (please enter)**

V. Burt, D. Brown, S. Isakson

**SUMMARIZE THE DISCUSSION (Point Form):**

Q: Do we have a community at all? No one showed up at the party and group for this OSonOS seems fractious...

Answer and discussion: different backgrounds, there are fewer people, "whoever comes is the right people", all the right stuff is going on under the surface...., community builds one-on-one, always happens at the right time.

The Net: it not the way to build community but is certainly a tool, duality is that the Net is the global community at its best and at its worst. We need the tools for discernment.

Discussed quantum physics, chaos theory and Margaret Wheatley.

**Conclusions/Next Steps**

"you can lead a horse to water but you can't make it drink....but I sure can salt the oats"

A chat room may be a better tool for spreading the word than the listserve....i.e. chat room allows ongoing real time dialogue versus email based dialogue.

Web pages need regular updating.

## Subscribing to Open Space Technology E-mail List

24.2

To subscribe to the list, send the following electronic message:

SUBSCRIBE OSLIST firstname lastname

(Nothing more, just that; no subject, no signature, nothing else. Substitute your first name and your last name for "firstname" and "lastname". If you don't have either a first or last name, invent, borrow, or steal one).

Send the above message to the following email address:

LISTSERV@IDBSU.IDBSU.EDU

You will receive confirmation of your subscription along with instructions. PLEASE SAVE THESE INSTRUCTIONS ON YOUR HARD DRIVE AND REFER TO THEM EARLY AND OFTEN INTO THE FUTURE, AND ESP. WHEN YOU WANT TO UNSUBSCRIBE.

Once you are subscribed (i.e., have received confirmation from the listserver), you may post messages to the list by sending your messages to:

OSLIST@IDBSU.IDBSU.EDU

NOTE that this email address is different from the first one. This is not a mistake. The first one you use only to subscribe and for some other housekeeping tasks that we can talk about later, if you're not familiar with this set up. After you subscribe you only need to be concerned with this second email address if all you want to do is post messages (and receive them, of course).

That's it!

### Suggested List Protocol

A protocol on many discussion lists is for every new member who wishes to "unlurk"---i.e., participate in the discussion to say a few words about himself/herself the first time. While this is not meant to be an imposition, it really improves communication in cyberspace. Many list members participate primarily through lurking--i.e., listening silently. This is just as it is in real life, and there is no problem with that at all.

### Digest Mode

One other thing. If OSLIST takes off, there might several messages posted everyday. If you prefer, you can set OSLIST to digest mode, which combines multiple postings into a single email messages. Easier to wade through. Here's how you do it. Send the following message

SET OSLIST DIGEST to LISTSERV@IDBSU.IDBSU.EDU after you receive notification that you are subscribed.

## Opening More Space

Open Space Report # 25  
October 26-27, 1997

Topic: Nurturing leaders in Ongoing Open Space organizations

Leader: Jody Orr

Other participants: Michael Pannwitz, Brian Bainbridge, Ellen Cohen, Marcelene Anderson, Jay Vogt, Diane Gibeault, Susan Nador, Judy Gast, Bruce Withrow

*Jody* -concern that both informal and formal leaders attempting to sustain ongoing Open Space in organizations, even when these formally support it often end up being victims: how can we provide support for leaders?

*Ellen* -affirmed the reality of the issue when home organization does not provide support

*Michael*: problem case history:

-consultant to a small company in crisis

-leader pushed for Open Space

-Michael not sure he understood what OS was

-e.g. that OS could change his position and role

-leader arrived in a suit and tie, as space was opened, he removed these and stripped to jeans and a t-shirt

-Open Space went well

-three days later, workers formed a Workers Council

-leader then fired the Council organizers

-leader had not really understood the follow-up implications

*Ellen*: leader's intent is important

*Susan*: what are the differences between Open Space in a for-profit and not for profit organization?

-can a board operate in Open Space? What does it look like?

*Jody*: once givens (e.g. legislative requirements) are identified and dealt with in other ways, the Board could meet in OS

*Susan*: could be a difficulty of quorum in her organization which OS might aggravate

*Brian*: OS operates on passion and commitment

-might require a shift of attitudes of/on the Board

-from being a corporate identity not about people to board members becoming the being of the Board

-Board's role to focus on possibilities, not outcomes

-he knows a Board which removed the boardroom table

*Bruce*: re support person:

-can serve in either an "expert"/resource mode or a process mode

## 25.2

Jay: both love and fear lead to excitement

- told story of his work which has led increasingly into a coaching mode

Bruce: **Can't command and control co-exist with OS?**

- theorized an OS event involving many departments

- afterwards, departments have back to their own work, which may require control

- could see a continuum for organizations, from OS to control

Brian: simple exposure to OS changes an organization

- changes may be apparent only later

Ellen: How do we support the leaders of change in an organization?

Brian: story of some leaders who decided to push for change despite possible resistance from above

- a consultant's role was to allow and help

- important to foster sense of responsibility for those promoting change

Jody: on Bruce's continuum (above), accountability might be a mediating factor

- accountability not the same as control

- helps link to the notion of responsibility

Diane: in talking to organizations about OS, we need to be clear that there will be outcomes

- counsel wisely about what OS is and is not good for

- could use "what if" scenarios in talking to organizations to help them appreciate possible consequences of OS

- important that OS facilitators be authentic and have integrity

- important not to set up a situation so that people get "exposed" in front of their peers

- important to get the "givens" (non-negotiables) on the table

- responsible freedom

- acknowledge the wisdom of groups

# Opening More Space

## OPEN SPACE REPORT #26

October 26-27, 1997

**TOPIC:** Managing volunteer boards in open space.

**LEADER:** Bruce Withrow

**Participants: (please enter)**

Ellen Cohen, Murbill Cooper, Leon DeKing, Barbara Feasby, S. Claire

**SUMMARIZE THE DISCUSSION (Point Form):**

What attracted you to this session?

- I. A belief that volunteer organizations already operate more like open space than like the way they think they operate -- and that the way they think they operate hinders more than it helps
- II. Strategic planning doesn't work in an environment that is changing as fast as health care
- III. Too many boards are de-energized and disheartened
- IV. Too few people are doing too much
- V. Boards need to regenerate spirit and enthusiasm
- VI. There is tremendous futility in trying to decide six months in advance what the issues are that the board will want to be talking about in six months time
- VII. I want to know how we can help the leadership of these organizations deal with the perceived loss of control associated with open space
- VIII. I want to be able to present the opportunity to the boards that I work with

What could be done?

- IX. Find a way to let the boards experience it
- X. Make training and education available to the boards – Many boards are not aware of their roles and responsibilities and this gets in the way
- XI. There may be some meetings that are much easier to run in open space than others – a district meeting where all are equal and only the facilitator is different
- XII. Harrison's third day can help address how the priorities will be set and accomplished
- XIII. Some work in boards can be done by individuals in their “silos” – this doesn't need open space – Other work is joint work that crosses the boundaries – this is the “we” work that could be done in open space – make a distinction between the two and manage them accordingly
- XIV. People who are on the board for “prestige” are a drain on the board -- can open space “weed them out”
- XV. Leon De King's Open Space index can be used to assess the “readiness of the board”
- XVI. Link to their passion

## 26.2

What are some of the characteristics of a board that is ready for open space?

- XVII. Gary Hamel's model of rule makers, rule takers and rule breakers – is it the rule breakers?
- XVIII. One that already trusts the person who will facilitate the open space – includes a trust that the facilitator trusts them to work-out their own conflicts
- XIX. One that is in chaos but coping
- XX. One that isn't full of whiners not willing to take responsibility
- XXI. Participation is high

What are some of the characteristics of a board that isn't ready

- XXII. Sometimes a board takes money that has too many strings attached to
- XXIII. A board that is always looking to someone else to solve their problems

### Conclusions/Next Steps

# Opening More Space

## OPEN SPACE REPORT # 27

October 26-27, 1997

**TOPIC:** "Day 3" of Open Space

**LEADER:** Peggy Holman

**Participants: (please enter)**

Diane Gibeault	Chuck Baroo	Ellen Cohen
Caroline Stalhane	Judy Gast	Susan Nolan
Karen Davis	Ed Roberts	Marcelene Anderson
Mark Brubacker	Michael Herman	Jay Vogt
Ann Galley-Thompson	David Hasbury	Janet Mairs
Winston Kinder in ch.		

**SUMMARIZE THE DISCUSSION (Point Form):**

The discussion was framed by the the question of how to set the stage for "where we go from here" following an open space. We covered a lot of ground, shared stories and examples and came up with an approach that held much resonance for us. The approach is described in the Next Steps section. So if you want to know about a VERY inspired approach to Day 3, look there!

Some of our conversation follows.

Purpose of "Day 3"

Day 3 is to name what has emerged. To support the community and the people in it to answer the question of "When I leave this space, where do I step?"

Some Mechanics

Two basic approaches were described: one based in voting and setting prioritites; the other based in synthesis.

**VOTING & PRIORITIZING**

Write the session topics on a chart

Have convenors note linkages they see with other topics

Pass out dots and have people put them on their top priorities

Set up sheets for the top vote getters and have people list possible actions on the sheets

They can also be thinking and writing down personal follow up actions

Have people self-select to do action planning on top topics (who, what, when; can do as a mind map)

Do quick presentations

**SYNTHESIZING**

Pose the question: "In the best of all possible worlds, if I could put my energy towards what I feel is most vital, what would it be?" (the idea, just like open space is to tap into personal passion and responsibility)

Ask people to write their answer down

Have someone declare their answer on a flip chart.

Hear from everyone; either by putting a check mark by something already said or adding something new

Self-select among the topics posted to discuss what's next.

A variant on this was to post everyone's answers and cluster and name the clusters.

The dilemma with these approaches to synthesis is that they don't scale up very well.

### On Voting and Prioritizing

The discomfort of voting and prioritizing is it forces things back into a constrained environment. It assumes the world is smaller on the other side of the open space. It seems to be driven by the needs of sponsors, consultants and participants for a neat package at the end, so it has a certain falseness to it.

### The Benefits of Synthesis

Synthesis allows for the shifts that take place during the session to be named and integrated into what happens next. It provides the opportunity for knowing where the collective energy is so that we can act together where it makes sense. The likelihood of creating what we want increases through aligned action.

On synthesis: "When we dream alone, it's only a dream  
When we dream together, it's the beginning of reality."

Another wonderful idea: open space is like breathing. It's only when we hold our breath that we create mooses.

### The Tree Metaphor

The metaphor of the tree came to life during our discussion. During the opening days of the open space, the branches and leaves are discussed. During Day 3, the trunks are identified and the roots planted. Over time, there are new ideas that bud and blossom and drop the sessions of future open spaces to take root. This led to the idea that during Day 3, post the sessions in the form of a tree. Central themes are the trunks, related ideas become the branches.

An alternative is to post related ideas in a mind map.

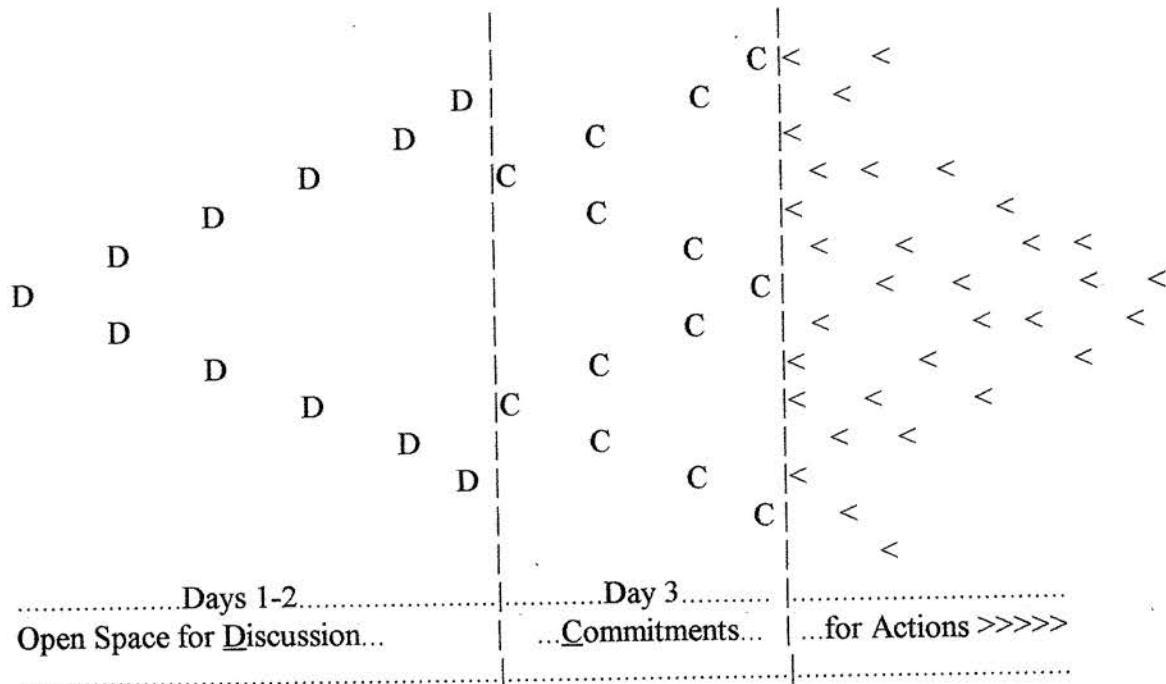
## Conclusions/Next Steps

### Context

The way we came to think about this process is that Open Space is about divergence. Day 3 is about emergence of the "collective consciousness" and convergence where it makes sense. In more conventional language it is about alignment and focus.

Paint this picture: from a point (the open space theme), picture a < that represents divergence. During this time and into the opening of Day 3 there is emergence: ||. Inside this emergence are many small parallel divergences. Over time (after the open space)

there is a convergence that occurs as some ideas are pursued and birth others and some die out. The shape that forms from this collection is >.



The first opening surfaces those issues and opportunities that people are ready to talk about. The second opening, on Day 3, surfaces those areas where people are ready to commit discretionary energy and resources to productive action. As people continue discussions and commitments beyond the event, the vision gets focused. As they act on their commitments, the vision is manifested in the world. The gift and challenge of Day 3, then, is grounding the openness of Days 1-2 in the actions required in the "real" world.

### The Aha

The amazing realization we had was that synthesis can be achieved by doing an open space within the open space; with a little different theme. The Day 3 question is about opening the space for action; what is possible now? It is bounded by what is real for us now. One other difference from the opening open space: this time, the focus is on convergence, so where topics are similar, put them together. We expect the number of subjects to be fewer and more focused. So people can gather around what matters most to them to discuss "whats next."

The Day 3 open space benefits from the time spent in divergence in which truths were spoken, mooses are put on the table and perspectives shift. It reminds everyone that open space goes beyond the event and is iterative (cyclic?) in nature. Day 3 done this way both grounds people in "whats next" and reminds them that the space is always open.

## Opening More Space

Report # 28  
October 25-27, 1997

**Topic: The Individual as a Self-organizing System**

**Facilitator:** Fran Olsen

**Other participants:** Rick Sheffer, Ann Thompson (note-taker), Audrey Coward, Susan Claire, Marlene Blum, Janine Kinch, Mary Wheeler

*Ann:* has been working in Open Space since 1983

- tries to live in Open Space
- sees the strike re the Ontario education system breaking the system, providing a window of opportunity to create something new
- the time has come for Open Space in education

*Janine:* is there really a difference between teachers, therapists and facilitators?

- common training needed
- need to set boundaries, open space, allow creativity to arise
- interested in Open Space and the arts, how they could work together

-need to provide opportunity for growth and nurturing

-growth = change = learning

- expanding your NOW

-growth happens

-learning is putting meaning to growth

-how does education fit in?

-growth is a whole process

-growth means learning

-has a box around it

-education has baggage

-we need to get beyond our old definitions

-traditional to think of education as imposed information

-of an alive, growing classroom, but kids couldn't pass "the test"

-lots of good things happen in education that are not on the curriculum and therefore can't be tested for

-there's a difference between knowledge and information

-knowledge is holistic

-information is partial

-both are needed

-education system not now paying attention to knowledge

-education was traditionally training for factory workers

-schools take young children and narrow their reality

-maybe the "Dead Moose" of society has been the loss of spirit

-our educational system has imposed one learning style on children  
 -we need different learning styles

*Rick:* broken relationships, broken loyalties between social service safety net and individuals  
 -works with an organization dealing with poverty in the inner city (Montreal)  
 -single moms on welfare  
 -how does education deal with these issues?  
 -it can't do everything!

*Audrey:* what triggers one person to transform and not another?  
 -is there a difference between men and women in the triggers?  
 -has connected personally with new energy in the world  
 -raises many questions on what to do next

*Ann:* living in Open Space:  
 -knowing when and where to jump in when opportunity arises

**Marlene:** (in Human Relations in health system)  
 -becoming very interested in the area of spirituality in organizations  
 -how do you get the conversation going in a large organization?  
 -wonderful opportunity for Open Space

**Definition of spirituality:**

-we are spiritual beings in a spiritual world  
 -religion is one person's experience of the spiritual occurring in a place and time  
 -gets formalized by others into dogma  
 -much more proscribed

-Open Space attests to our living in a spiritual world  
 -the arts are spiritual

*Fran:* education is the unfolding of the whole person (body, mind, and spirit)  
 -yoga, meditation  
 -the arts as a means of connecting to the wholeness that we are  
 -we need a curriculum for human beings

*Marlene:* as a child develops, we need to nurture its ability to listen to its inner voice  
 -we live in different realities at the same time, and it's OK  
 -it's more a matter of level of consciousness  
 -living in Open Space takes you into a spiritual realm

*Ann:* if we are spiritual in a spiritual world, then we are "no body" and just playing in the dance and drama of life  
 -if the idea I have to share at this moment is untimely, I can let it go for the moment

-we moved into a dynamic happening in the moment between two group members  
 -they explored the duality, how it was affecting the people involved

Open Space Session  
Sunday, Oct. 26, 1997  
Time: 3:30 - Place: D

Topic: Truth telling in an organization in preparation for open space event

Topic originator: Diane Brown

Present:

Hugh Huntington

Jackie Binkert

Galena

Michael Herman

Diane Gibeault

Frances

Janet Meir

Ed

- First decide what are the issues here
- What creates a safe place to speak your truth and what is safety/
- Where there is fear the truth seldom gets spoken or heard
- In order for truth to be heard it needs to be spoken as an observation of fact not a statement of judgment
- Judgement creates resistance and truth is not well served
- There are many ways to influence toxic environment one way is to create a "trust network" in the organization
- This is made up of individuals who come together in trust and are able to speak non judgmental truths to each other - and maybe sometimes judgmental truth
- This net work usually crosses all levels and functions with in the organization
- This is an example of a self organizing system
- The uncomfortable issues do need to be addressed - the group not the facilitator will identify when and where this is to be done during an open space event
- Who has the truth? All of us do!
- Determine what part of you has a need to tell the truth - what is your belief system- is this truth or not - could it be anger - or arrogance - does the message ring true or hollow
- How much truth do individuals have the capacity for? Be respectful for whatever ocean or thimble full they can accept - resistance is a sign to listen and reframe
- As a facilitator of open space if you feel that you have the truth for the group, you maybe should not convene the session. You will find things happening that you will not like
- You will need to let go and accept what it is
- One needs to look at an organization as perfect just as it is and seek from those in the system what is important to them
- Build upon each others vision
- Peel the onion slowly to get to the core
- Dealing with Stories - Elements of stories change yet there is always a core kernel of the story that can be said in a word or few word and have meaning for the group
- Hugh's story of the union negotiation meeting with the president of he company
- Hugh acted advisor for the group - not his job to tell the truth but to help create the environment for them to tell their truth

- The story of the frog and the scorpion - the scorpion asks the frog for a ride to the other side of the pond, the frog says yes only don't sting me or we both will die - the frog gets to the middle of the pond and the scorpion stings him - he looks at the scorpion and asks "Why did you do that?" The scorpion replies "Because that's the way I am."
- Once the client tells you what the issue is reflect it back to the group to assure it is the issue to be discussed.
- Do we support people in marginal comfort? Rescuing - not allowing them to get to point of pain that brings fundamental change
- Are they sufficiently uncomfortable to want to do something about the issue?
- Is this working to the level you think it should be?
- How would you like it to be working?
- There are only three things you can do to screw up Open Space
  - Manage It - Manage It - Manage It
- If you are to prescriptive or guiding, you can become the focal point of free floating anxiety
- Draw no conclusions if you share an example of something
- You are looked at like standard setters
- What ever you say becomes a focus

• Thank you all for the depth of exploration!!

**Please add to Index of Reports as Submitted**

29) Truth telling in an organization in preparation for an Open Space event

**Please add to Topical Index of Reports under:**

**V A Closer Look at Aspects of Open Space Workshops**

29) Truth telling in an organization in preparation for an Open Space event