

Using Open Space with Other Facilitation Approaches

Le Forum Ouvert

utilisé avec d'autres approches à l'animation

Rapports des discussions

Discussion Reports

Open Space Institute of Canada

Ottawa,

November 27 novembre 1999

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Discussion Report / Rapport de la discussion #1

Topic / Sujet Using other approaches to prepare and follow-up with the sponsor

Who called this meeting? Donna Clark

Qui a convoqué le groupe ?

**Who came?
Qui a participé?**

Winston Kinch
Sharon Quarrington
Patrick McAuley

Key points (point form) / Principaux éléments (sous forme abrégée)

- * See discussion on the OSI list serve about this topic of preparing and working with the sponsor.
- * In order to ensure the open space process is appropriate and the senior team is prepared to engage in the process it is critical to work with the CEO and his/her senior team
- * Question which has passion for the CEO/senior leader may not be the right question
- * Critical to have the CEO involved in the process - start at the top
- * It is critical to have a question that has "passion potential" in the organization
- * Participants had various experiences with preparation using more traditional facilitation techniques/dialogue/surveys, etc. to identify the purpose and the issue.
The more work which people in the group had done in preparation, the more comfortable clients were with the event and the impact of the event on their organizations
- * Even if we put a detailed process down on paper - there is not one way to do this - need to rely on the essence of open space and create some opportunity for understanding of this with the client/sponsor group
- * Important to work with questioning assumptions people make at this stage
- * Need to be careful in preparatory work that you encourage people to stick with the questions - not rush to the solutions as they are so used to doing
- * Important to ensure that there is alignment around the issue - this is an intuitive process – you know when you have it
- * Factors which affect the preparation time and approach are:
 - previous relationship with the client
 - purpose of intervention - whole system versus one very specific business issue
 - trust is a critical factor - they may trust you - not the process initially
 - corporate culture - readiness
- * Don't try to convince people to use open space!

Discussion Report/ Rapport de la discussion# 2

Topic / Sujet When do I choose open space over other large group?
methodologies, or not?

Who called this meeting? Catherine & Meg
Qui a convoqué le groupe ?

Who came? Catherine, Meg, Rick, Tanmayo, Lucy, Bruce, Dorothy, Fran,
Qui a participé ? Cathy, Jacqueline

Key points (point form) / Principaux éléments (sous forme abrégée)

- * Criteria for Open space:
 - Time: dependent on complexity (3hrs - 3 days)
 - You can incorporate the spirit of open space in small times
 - Longer timeframes allow you to "sleep on it" - process deeply
 - Two (or more) day design you can begin with executive or data presentations the evening before
- * Topic:
 - Os is good with a complex topic
 - No fixed outcomes!
- * Participation:
 - mandatory attendance can work because of law of 2 feet
 - People need to take responsibility for the quality of their participation
- * Assessment:
 - Leader willing to take risk, engage in the process & follow up
 - Correct topic is essential
 - Need to develop trust with the client
- * Other thoughts on open space:
 - Need to have faith that structure will emerge form chaos
 - Definition of topic will determine degree of tangible results
 - Allows for 4th dimension to emerge
 - Not as dependent on facilitator design skills
 - Maybe too scary for some orgs
 - OS can be used to open space with other technologies
- * Other methodologies:
 - Future search - (
 - Weisbord & Janoff Strengths are:
 - Establishing common ground, set differences aside
 - Very useful with community groups
 - Action planning considered weakest part
 - Visioning of future
 - Risk - individuals may block the process if not open
 - Process essentials - 16 hours, 8tables of 8 series of structured exercises
 - Requires significant up front work to establish theme & participants
 - Structure is prescribed

Real Time Strategic change (Whole scale strategic change)
Dannemiller, Jacobs
More focus on leader direction
Significant up front planning, heavy on logistics
Works with VERY large groups...>1000
Alternates between large events & "deep dives"
Process open to the wisdom of the group

- * Other methodologies not discussed:
Appreciative inquiry
Polarity management
Dialogue

Discussion Report / Rapport de la discussion#3

Topic / Sujet Other Methodologies--Limiting or Enhancing to Open Space

Who called this meeting? Ann G. Thompson

Qui a convoqué le groupe ?

Who came? Gwen McCauley, Larry Peterson, Ann Thompson

Qui a participé ?

Key points (point form) / Principaux éléments (sous forme abrégée)

- suspicious of other methodologies that are overly rigid
- If needed, you can introduce other things in emergencies.
- Other methods have a framework but not rigid as other anxieties get generated
- Set the context for Open Space and for other methodologies, such as future search , mind-mapping etc.
- Still work with spirit-- can use "good" questions to bring the spirit back such as 1)
- 1) What's working that makes a difference?
- 2) What's not working that makes a difference?
- 3) What's missing ?
- 4) What is working but does not make a difference?
- Let topics group themselves,--

Recommendations:

- Use other methods first, Be aware of mixing Open Space with other methods.
- Be clear -- do not call other methods Open Space.
- "It's just a taste" Ken Wilber --"It's All Just A Taste"

Discussion Report / Rapport de la discussion # 4

Topic / Sujet How do we get others passionate about the leader's vision?

Who called this meeting? Patrick McAuley

Qui a convoqué le groupe ?

Who came? Sharon Quarrington, Catherine McKenna, Meg Salter, Lucy

Key points (point form) / Principaux éléments (sous forme abrégée)

- * The question for this session assumed that we were planning an OS event as a means of involving a large group in the visioning process, and needed to get enough information out about the leader's vision so that people could get worked up (passionate) enough to want to participate.
- * The OS event could be framed with at least two different kinds of boundaries:
- * Leader's vision is a given and the question is how to get there, or
- * Leader has a "draft vision" and the group will help define the final vision.
- * Some ideas for getting people worked up:
- * At Nortel, where it was not possible to accommodate all potential attendees at a large event, people were asked to apply to attend, by explaining why they should participate. They were also encouraged to talk to their colleagues. Attendees were chosen based on the level of passion exhibited in their "applications."
- * Leader or leadership team members make personal phone calls to attendees.
- * Use a "design team" of people who are representative of the global group of attendees. This team helps define the question to be posed for the Open Space, and determines how best to communicate it. This team also takes ownership for spreading the message personally to their peers, explaining what the question is, why the organization is addressing it and why the participation of many people matters.
- * Be willing to accept a small attendance for the OS event and use it to generate a "buzz" in the organization and follow up with another event(s) that will capitalize on the wider interest generated by the first one.
- * There is a paradox that must be accepted in organizing an OS event: you want as many people as possible to be there, but you can't force them to come because you really want everyone who comes to be passionate about the question.

Solutions

- * A key factor is that the sponsor must be willing to let go of her initial ideas if the group disagrees, and must be willing to follow through after the event. And both points must be well communicated and understood in advance.
- * The leader's role should be to frame an engaging question rather than to have all the answers.
- * Framing the question for the OS event well is key to getting an impassioned audience. A key quote (anonymous): "The quality of your life is not determined by the quantity and accuracy of your answers, but by the courage of your questions."

Discussion Report / Rapport de la discussion # 5

Topic / Sujet : From Open Space to Future Search to Other methods...

Who called this meeting? Jacqueline Pelletier

Qui a convoqué le groupe ?

Who came? Larry Peterson, Gwen McCauley, Fran Olsen, Donna
Qui a participé? Clark, Ann Thompson, Bruce Craig, Sharon Quarrington

Key points (point form) / Principaux éléments

Larry reports that he understands that Marvin Weisbord and people in Searchnet now recommend using Open Space for action planning, within Future Search.

Larry points out that a major distinction between F.S. and O.S. is that because F.S. is facilitated, there may be small breakthroughs in awareness that self-organizing is happening (a taste of self-organizing). Because O.S. is completely self-organizing, it allows for larger and more ongoing breakthroughs in awareness of self-organizing (I really do self-manage).

With respect to Jacqueline's client situation (going from O.S. with one specific group and then on to F.S. with the broader community of stakeholders to follow-up), it was agreed that O.S. could be a powerful way of identifying items for discussion by the broader stakeholder community.

The facilitator would need to clarify expectations in order for this to be successful.

Larry has reported some moments in F.S. that are dispiriting, i.e. the current trends mind-map exercise. It is useful to acknowledge to the group that an exploration of the dark side is useful.

Another approach to 'glads and sads' or 'prouds and sorries' is to ask:

- . what worked in this for me
- . what didn't work in this for me
- . what's missing in this for me

A feature of the dark space is the facilitator's self-knowledge, comfort with their own dark side and ability to 'hold the space'.

It is important that people are left to experience the dark spots overnight.

It is important to acknowledge that 'the group unconscious' or 'the extra person' is always present.

There was a general belief that O.S. allows this to surface more readily than F.S.

In other words, O.S. creates the possibility for the unconscious of 'the whole' to be brought into consciousness.

Regarding mind-mapping, Gwen uses 'Inspiration K-12' software. Software also exists for the F.S. approach to mind-mapping.

Discussion Report / Rapport de la discussion#6

Topic/Sujet	How Kundalini Yoga transforms the Individual first- then use Open Space
Who called the meeting?	Ann G. Thompson
Who came?	Fran Olsen, Ann Thompson

Key points & Recommendations/

- attention to body/mind/spirit process, such as Yoga, Tai chi, etc., during an Open Space event & especially during an OSI event might deepen the integrative---conscious--expanding-community- building spirit, thereby releasing more fully human aspects of Open Space.

While we did not get around to discussing how or when , it occurred to me that these could be introduced before breakfast, during a session, or, during 5'oclock news hour.

Discussion Report / Rapport de la discussion #7

Topic / Sujet Moving from Open Space to "real life"

**Who called this meeting?
Qui a convoqué le groupe?** Sharon Quarrington

**Who came?
Qui a participé?** Sharon, Bruce, Dorothy, Jacqueline, Catherine

Key points (point form) / Principaux éléments (sous forme abrégée)

- * OS (with or without follow up) usually becomes a "reference point" in the life of an organization (e.g. people will refer back to OS 6 months later)
- * People need to be assured that the report from day 1 will not get lost through convergence
- * they convergence is done will impact follow up:
- * One type of convergence (Jacqueline)
- * reopen space entirely for action planning issues
- * have participants stay at the wall to decide which issues to cluster
- * "vote with feet" to join action group, ensuring groups working on same cluster are physically in the same area in case they wish to join forces at some point
- * management responds to recommendations of action groups after lunch and assigns responsibilities for ongoing action
- * working groups form and self manage
- * Another convergence (Sharon)
- * action issues come out of all sessions
- * issues are clustered, action groups formed (vote with feet)
- * each action group chooses champion (mgmt) and sponsor (staff) leaders and sets time for next meeting
- * champions and sponsors form ongoing task force to support action teams
- * a follow up whole system event is set ahead of time where the action teams can report on progress (in OS or not)
- * some organizations seem to need much less time involvement in pre planning and follow up than others
- * clients where bureaucracy is the norm need more
- * clients who are already "connected" and "do it" oriented need less
- * it helps if barriers have been broken down prior to the OS (e.g. one client had been through a traumatic event as a group)
- * it helps if group has been through OS before
- * if the system is resistant to change (any change) may need more pre planning and follow up support
- * if system does not commit enough time (e.g. will only do 1/2 day OS) they need to be realistic about expectations on follow up
- * in pre work it helps to discuss follow up with management
- * management/sponsor needs to stay for full event or they will not be engaged and will likely not support recommendations and hence will not follow through
- * can use a follow up OS to respond to the initial OS

Discussion Report / Rapport de la discussion# 8

Topic: Integrating Open Space with Change Management and Real Time Strategic Change

Who called the meeting: Bruce Craig

Who came: Jacqueline, Catherine, Sharon, Dorothy, Larry, Rick, Sharon, Winston, Cathy, others

Key Points:

- * the session started with an overview of the change formula (dissatisfaction x shared vision x first steps must be greater than resistance in order for change to occur - Dick Beckhard) and the link to the key issues and conversations that must happen for change to occur:
 1. alignment of the system to a common overall direction for change
 2. readiness of those who are impacted and responsible to engage in the change effort
 3. dissatisfaction and reasons for the change effort
 4. shared vision of the future or what it will look like when we get there
 5. action ideas and options/ alternatives for moving toward the vision
 6. implementation or action teams of people with passion to carry forward the ideas
 7. momentum sessions when the whole system comes back together to assess, identify barriers and celebrate success
- * the need to have initial or pre-conference meetings with representatives from across the system (max-mix) to align the leader's vision with the concerns and challenges faced by people across the organization was discussed
- * concerns about when the vision is not negotiable were discussed - sometimes this is the case and the large group would work on how to achieve the vision or move forward, sometimes the large group would provide feedback and be able to revise or develop the vision and other times the large group would together generate the vision - these were all seen as ways to think about alignment in different situations
- * the issue of shared ownership and commitment make the level of involvement in the visioning critical - too little and the ownership stays with the senior leader or group and the "roll-out" is resisted - more "space" to influence the direction is seen as increasing the likelihood of success
- * clear boundaries or givens re: what is negotiable and not was seen as essential regardless of the level - people need to know the "truth" and be able to act accordingly - this should ensure that the work done is appropriate and that there will be no "thanks but we've already decided" situations that could kill trust and cooperation
- * real time strategic change or whole scale change could be used prior to open space to tackle the issue of readiness and resistance - view from the bridge, environmental scans, competitive data, customer feedback, internal effectiveness assessment exercises, cross departmental feedback, etc. could be used to generate a shared data base and understanding of the reasons and drivers of change - these are usually done in mixed stakeholder table groups with report outs and overall summaries generated through discussion with the large group - the idea here would be to prepare people through dealing with the D x V and R elements of the formula prior to OS

- * questions about whether these could be done in open space were raised with a general feeling that they could be - the method of how you get at these issues is less important than the fact that a larger change framework is followed to ensure that the outputs of OS are positioned and followed through on - without proper understanding of the reasons and direction of change including overall buy-in and the resolution of issues of resistance to enable people to fully engage (readiness) in the change effort people may not be able to make a full and effective contribution to the OS event
- * some felt strongly that these issues could be dealt with in OS and that whatever the systems needed to work on would come out - these included involvement of other people, frustrations or issues with leadership or the new direction or questions about why are we changing - so just move to OS without a lot of pre-session involvement or other approaches
- * most people are doing some pre-work prior to OS - the question is how much, what we do, who is involved (the leader, senior team, whole system through a representative group), and whether some issues (resistance and readiness) and capabilities (e.g. dialogue) could be worked on prior to OS is a challenge to all of us - especially if these activities would help increase the overall impact of OS in making real change happen vs. having a dynamic day
- * the issue of volunteerism was discussed re: the importance in change of having all the stakeholders in the room so that any decisions or changes would be understood, owned and supported by everyone who needed to implement it - some felt that being in the room could be mandatory with the Law of Two Feet taking effect at that point while others felt that coming should be optional so that those with passion would come and figure out what they needed to do based on who was there i.e. who shows tells you important information - a third perspective (the author) is that interventions could be made to engage people prior to the session to work on these issues of resistance and understanding so that most (90+%) will want to show up
- * holding our differences and staying consistent with the spirit of OS seems to be the challenge

Discussion Report / Rapport de la discussion#9

Title: When is Open Space no longer Open Space?

Convener: Gwen McCauley

Participants: Ann, Larry, Pat, Meg, Tannmayo, Lucy

Discussion Highlights:

- The topic was raised because of Gwen's experience (and frustration) of having people call just about any "unstructured" event an Open Space
- We concluded that there were three critical elements which needed to be present for an event to be considered an Open Space: 1) Voluntary participation 2) Willingness to be surprised 3) A clearly defined topic for consideration
- Some of our discussions centered on our responsibility as practitioners in working with client expectations and having the courage to be clear on what our boundaries are
- We talked about the conundrum of non-certification and how the gift that Harrison has given us calls us to a high level of integrity as practitioners
- Many of us use the principles of Open Space in other domains such as Future Search
- Parallels were drawn between the phenomena of the WWW and Linux and Open

Space. WWW and Linux were created and given away with no restrictions in the belief that there was something inherently powerful and contributory in them. While others may take the WWW and Linux and build on them, they fundamentally are what their creators made. Open Space appears to operate at a similar level.

- We asked the question "When does spirit get lost"? For some people creativity equals spirituality. There was general agreement that spirit gets lost when there is not voluntary participation and participants are not willing to be surprised.

Discussion Report / Rapport de la discussion# 10

Title: Staying Open as a facilitator

Convener: Gwen McCauley

Participants: Pat, Donna, Lucy, Tanm Mayo, Dorothy, Cathy

Discussion Highlights:

Some of us have had the experience of needing to introduce other tools and technologies into an Open Space event. This was an opportunity to explore the challenges we face as Open Space facilitators when attempting to achieve that.

- There were no hard and fast tips developed for handling this type of scenario.
- Several provocative thoughts emerged:
- Pat described Marv Weisbord's saying "Don't just do something, stand there"
- Wm. Isaac's definition of Dialogue "without knowing what we're going to say"
- There is a need for facilitators to have a sounding board
- "Being" the principles rather than "doing" the principles
- The importance of modeling Open Space
- This is an opportunity to display the on-going challenge and strength of being vulnerable as a facilitator
- The need for discernment as an on-going process
- The message of what Open Space requires can be taken to other methodologies

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Notes on the Meeting

Open Space Institute of Canada Steering Committee
November 27, 1999
Ottawa OSI Event

Participants: Larry Peterson (Chair), Diane Gibeault, Winston Kinch, Meg Salter, Rick Sheffer

Financial & Membership Report:

We had 71 members before this event, and number of participants joined here, so we now have 80.

We had a bank balance of 5,317.41 at the beginning of this event and our income exceeded our expenditures in 1999 by \$170.97 up to November 25th. It appears that this event will also make a little money for OSI Canada.

Web Site:

We discussed at some length our next steps given that our Web Master, Sharon Quarington, will be really busy after the New Year (and the new baby). No one has volunteered to take on the task.

It was agreed that the Web Site was very important and that we had the resources to get assistance to manage the site. We agreed to spend \$10 an hour for a student (probably high school) to help manage the site. We agreed to spend up to \$1200 if necessary, but believe the expense will be more in the rated to \$500 - \$750.

Larry has agreed to take on the management of the student and the web site, given some of the changes in other roles. Both Meg and Winston said that they would also explore possible students. A bilingual capability is desired.

Other Roles:

Larry stated that he felt it was time to pass on the role of keeping the membership and the books for OSI Canada. Diane Gibeault said that she was willing consider taking on that role. It was agreed that an Ottawa address for membership and the bilingual capacity was good idea. They will work on a transfer of responsibilities.

Larry is willing to continue to manage what is left of Harrison's books.

Institute Liability

We discussed the issues related to OSI Canada liability and the use of the name "institute". The term may convey more than it is. OSI Canada is more of a network or community of practice. That is partly why we have stayed informal. Given this, our web site needs to be clear as to what we are and are not.

We listed the following things that we are about:

- * Professional Development
- * Personal Development
- * Networking
- * Learning
- * Community of Practice

Winston is to get a legal opinion as to the liability issues involved. Short of incorporation, what legal recourse do we have if needed?

Harrison Owen in June 2000:

Larry has been in conversation with Harrison and with ACCORD in Toronto. ACCORD is most interested in Harrison doing a workshop on his next book, Spirit of the Organization, likely June 8-9, 2000. Larry and Harrison have talked about an event, which includes both some Open Space and some conversation with Harrison. ACCORD is willing to give OSI Canada members a discount as it does its own membership. There was agreement to proceed with the approach.

Next Step Issues

- * We need a volunteer to edit the next OSI Canada Newsletter. Michelle Cooper did a great job last time.
- * We need a volunteer to sponsor the next OSI Canada gathering