

OPEN SPACE GUIDE FOR GROUP STRUCTURE AND MEET-
ING PLANNING - BETA VERSION



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1.0 Open Space in the Climate Movement

We are global warming solutions. We are a force for change, a force that can step outside the old energy paradigm to build the future and present that we know is possible. People like us, acting in every community, hold the ideas and inspiration for change, and we can believe in those people as we believe in ourselves.

Open space technology realizes the potential in all people to make meaningful contributions. It breaks down distinctions between ordinary and extraordinary, between leader and follower, expert and layman. It doesn't deny those realities, but rather creates the conditions where those identities step out of the rigid boxes they normally get stuck in. Just as capitalism draws out the potential of everyone to create wealth, open space technology attempts to draw out the creative and civic potential of all of us.

Global warming and the world's energy problems will be solved by people, and they will be solved creatively by drawing together resources, forces, ideas and energy from many different people and places. We can help create the place for that to happen.

1.1 Who is this for?

This document is for leaders and potential leaders. This is to help you better run an activist group and facilitate meetings. It's good, but not necessary to have experience with leadership. For a refresher or starter, see the Sierra Student Coalition's [Facilitation Handout](http://www.ssc.org/pdf/SEAC_facilitation.pdf). www.ssc.org/pdf/SEAC_facilitation.pdf

The Open Space Guide is also for anyone who is driven to work with people differently and better. We include brief discussions of the pros and cons of various forms of meeting. We hope that you can join us in developing this model. Please experiment with these ideas and share your insight. This is open-source, and we are all contributors. Lastly, this is a set of guidelines, but it only works if you make it your own.



1.2 Open Space outside the climate movement

Open Space technology works anywhere people want to work together. This guide owes some inspiration and some specifics to the work of Harrison Owen. For a further discussion of his work, please visit www.openspaceworld.com

2.0 Creating an Open Space Atmosphere

The best use of a participants time is doing what they really want to do rather than what they feel they should do. Predefined goals can limit engagement and ownership. The central paradox of holding a meeting, working session, or planning activity as an Open Space is that it must embrace the uncertain process of discussion and collaboration rather than strive towards a specific outcome or goal. we can trust great things can happen.

Whether at a campus group retreat, a community planning meeting or a conference, Open Space is meant to use time efficiently. Adapt this guide to your own situation and draw out any key points you need. Facilitating Open Space is at once difficult and relatively simple, but it takes dedication and an appreciation for the process. This section of the guide instructs leaders in how to facilitate Open Space Technology for a group meeting or planning process.

2.1 Principles of Open Space

1. Whoever comes are the right people.
2. Whenever it starts is the right time.
3. Whatever happens is the only thing that could have happened.
4. Whenever it's over, it's over.

AND The LAW of Two Feet

1. Whoever comes is the right people - This goes for the event, and for any discussion within it. Often, people will get very wrapped up in not having enough (or the right) people in a discussion that they forget to focus on relishing what they can get out of what's here. Accept that no one can be in every meeting, but those who choose to be there are the most important simply because of that choice.
2. Whenever it starts is the right time - 'Whenever it starts' puts us directly into the moment of the open space. We are not letting go of anything that just happened, and we're not ignoring what we'll happen in the future, but when the discussion starts, it's the right time to have the discussion. This principle commits ourselves ourselves to this discussion.
3. Whatever happens is the only thing that could have happened - The best discussions are relaxed, engaging, dynamic and hold a sense of possibility. The worst ones are forced, confined, artificial and forced to a predetermined outcome.
4. Whenever it's over, it's over - If participants feel finished with the discussion early, we can stop. If the topic is really exciting, we should feel empowered to continue at a later time - and in fact should be open to the possibility that it may recur throughout our lives. Breaks are also important, as are recaps and re-focusing. Do them as the group feels.

The Law of Two Feet - Go to the topic you're drawn to, whenever you feel like moving. Just be respectful and thankful of the group you are leaving and allow people to leave yours.

2.2 Ground Rules or Guidelines

Ground rules can empower us to do things well, and shouldn't aim to prevent us from doing them badly. Here are a few suggestions. It's important to make sure that there is space for group additions to ground rules, but outlining central ones that are broad and expansive covers most of the bases in a way that guides rather than mandates.

Open Space Ground Rules:

Sierra Student Coalition

Open Space Guide

1. Opinions Divide, Visions Unite
2. Step Forward, Step Back
3. Ask Questions if You Don't Understand: There are NO Stupid Questions
4. The Schedule is Flexible, and It's About Us
5. We need to take this home
6. This is deadly serious, and lot's of fun
7. It's okay to be raggedy
8. Speak from the place that you're at and own it
9. Open yourself
10. ALWAYS ask the audience if they have additions to ground rules ...

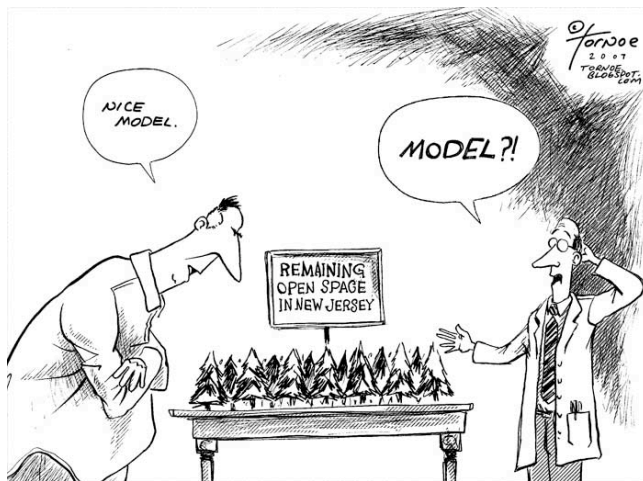
Opinions divide, visions unite: It's okay to disagree, but the point of disagreeing is not to be right or win, nor is it grounds for some type of theoretical contest. Disagreement provides us substance and material to build a way forward. The sense of unity in our vision can pull us together and give us a sense of common goals even if we have strong disagreements on the details. Another way to put it is, disagree with ideas, not people, and do it in a way that keeps affirming that we are a team.

2. Step up, step back: If a voice is infrequently heard in conversation, we encourage them to step up so we don't miss their contributions. If someone talks a lot, then we encourage them to be aware of others voices.

3. Ask questions if you don't understand: Open spaces can and should bring everyone along. If you have a question, voice it. It doesn't matter how basic it sounds, just ask!

4. The schedule is flexible, and it's up yo us: Structures and plans are only useful as long as they are useful. If everyone is bored or de-energized, something else needs to happen, if everyone's excited and there's a next step everyone wants to do, go for it!

5. We need to take this home: If everything we talk about in personal experience and think as we are discussing it how it applies to everything that we do. If a discussion is not going to help us in understanding or acting, it doesn't mean as much.



6. This is deadly serious, and lots of fun: We're taking on the most dangerous and scary challenges the world poses. We should take that seriously. However, we're not going to do it very well if we're mired in doom and gloom. The changes we are pursuing are some of the most amazing things anyone in the world could possibly do. Remember we're trying to do something amazin.

7. It's okay to be raggedy: Don't worry about having eloquent and well-shaped ideas all the time - you don't have to be at a conclusion before the ideas you express are profound and useful. It can help to preface remarks that are tentative but valuable by saying, "this is raggedy..."

8. Speak from where you are and own that position: Claiming our experience is generalized can lead to problematic situations. In general we should avoid

trying to qualify a group of people a certain way, even if we are assuming they are 'like us'. Use "I" statements, talk about your experience and let it resonate with what everyone else feels. Own what you feel - not the categories you may feel you're 'supposed' to be like, and speak from it.

9. Open yourself: Challenge yourself to be really alive and aware of everyone else. We build trust and create safe space by being unafraid to boldly speak from the heart.

10. Ask for more: If you're not going to ask the audience if they have additions that are important, you don't understand open space.

2.3 How it works (short version)

Pose the question that the group is there to address, like “what should our group do this year to stop global warming?” Anyone can propose a topic to discuss by writing it on paper on the wall. The group splits up to discuss based on what people want to do. Participants drift in between conversations as they feel they want to, while each discussion uses a notepad to keep track of ideas. Then everyone comes back together to compare exciting ideas and plans. Repeat as necessary.

2.4 How it works (the long version)

Materials Needed

- + **Time:** variable 1-3 hours (if the group is very large, topic proposal can occur sporadically on a common wall beforehand)
- + **Participants:** 20-300 excited people
- + **Paper, Markers, Tape:** To write topics in big letters and post them on walls.
- + **Spaces:** (corners of the room, tables, separate rooms, etc.) for many small groups of participants
- + **Thought Provoking Question:** A really good (clear and open) question to generate discussion
- + **Chairs:** or something else for people to stand on (optional, if group is large)

Start the Open Space by speaking as the facilitator. Set the tone of the session and bring everyone's focus into the group. Stretch, sing, dance, collectively imagine, or even just breath. Step into the present. Then Explain the principles of Open Space Technology and how the session will work. After explaining the principles, you want to walk through the exercise (depending on time, group size, or atmosphere, you may want to explain the whole process first or as you go along).

State the opening question. This question needs to allow a broad range of responses, but a very clear TYPE of response - many discussion topics that addresses the central question. For example, “What can our group do this year to build a climate positive world?” You want to develop this question beforehand, possibly in a small focus group of the larger team.

Post Topics. Have people write their topics on the wall. If you post, you're committing to be a group "Convener" and start the conversation. Conveners should avoid hosting their topic as an expert who will do most of the talking but rather as being interested.

- A) All posts should be taped to the wall with the discussion topic and the convener's name on it.
- B) Set a time limit on this step (5-15 minutes) depending on group size, and can finish early after asking if everyone is done.
- C) Check to clarify topics, possibly combining or splitting as needed. Do this quickly while respecting opinions.
- D) If it is a very large group (100+), it may make the most sense to announce the process beforehand when the Open Space is established and have people post ideas through an intervening time when people are doing other things before coming back to the Open Space.

Vote with your feet. Everyone moves to the topic they wish to start with. Assign spaces based on the numbers, but check before so you know what you're doing.

Start Talking. Groups move and start talking. One convener (topic-poster) must commit to staying with the group. Make sure each groups topic is visible, so people can join this discussion late if they use the law of two feet (remind them of that). Set at time limit and have the group agree to wrap things up around that time.

Let the discussions happen: Each participant should feel free to respectfully move it in a certain direction or get some kind of resolution from discussions that they are in without dominating. Engage actively, but don't control.

6. Report Back: Reconvene and have each group do a brief report back on what happened. Extract concrete conclusions, goals, working groups, plans or visions and celebrate how productive it was. Now is the time to make

commitments to the group. Just don't force it.

7. **Debrief:** Do a quick debrief of the process. This does not have to be exhaustive, just let the group get a sense of how it collectively feels about the activity.

2.5 Facilitation and Leadership

Facilitators often struggle between the role of facilitating a group's collective work and participating actively as a member within in. In a user-based event, embrace that paradox actively and consciously. As an organizer, try to be an active leader and own your position, yet create freedom by not trying to control the direction or outcome of the group. This is sometimes very difficult, since groups often expect strong direction, and will either follow in it's path if someone takes that role or remain stagnant with very little conversation if no one does. Being clear about what a user-based conference is and the expectations for participation, group direction, and shared responsibility for working together really help.

Try to avoid acting as a manager, but at the same time be conscious of your role facilitating the conference towards letting participants work openly. The optimal group dynamic in a user-based event is where everyone feels actively like a participant and a facilitator simultaneously - adding to the debate while ensuring it remains open. As an organizer, your role is largely to role-model this process and frame a sense of team that encourages everyone else to adopt it.



3.0 Campus and Community Groups

Open Space Technology is a powerful tool for building and running effective activist groups. Open Space groups can be large - regular attendance of 60, 80 or even 100 people. They can take on many campaigns at once. And they avoid agonizing decisions over resources or unreasonable demands on leaders time. A group that commits to Open Space will change and grow by releasing the potential of all its members.

3.1 The Thursday Night Group model

TNG started at Williams College due to frustrations with the ineffectiveness of the previous environmental group, and was based on a very loose understanding of Middlebury College's group. Since then it has grown significantly and involved 50 people weekly in running 4-7 simultaneous campaigns and projects.

Ongoing communications and recruitment: Facebook. Our listserve is a facebook group. We send a facebook message before every meeting, ask for volunteers and post news stories. Leaders, loosely defined, are admins and can send messages. A facebook group is public, so you know who's in the group before you join and once you're in. It also broadcasts the fact that "3 of your friends joined Thursday Night Group" to parts of the network. Furthermore, the event function is useful for social gatherings.

Difficulties: While most people have facebook and are happy to use it this way, not everyone does. It also means separate systems are needed to actually send files and collaborate on work. A parallel google group is useful for communication between active members.

Meeting space and atmosphere: Relaxed, cool, productive. We meet in a big living room at 10:00 at night. People bring beer and hang out before and after the meeting. We intentionally chose not to meet in the environmental studies house because we wish to set our own identity. (The same thinking went into the name.) Its important for the meeting agenda be as consistent as possible so members know what to expect, and the convener/facilitator has an easier time when its the same. Anyone can begin a meeting, and its potentially everyone's responsibility to get things rolling.

Difficulties: Creating strong norms requires people to observe them. Shaping norms requires discussions about the group, best had by core group members but outside of meeting times and the regular, action oriented agenda.

Facilitation: Anyone can facilitate a meeting. Its better if it rotates, and older group members should encourage younger ones to take this on. Since the meeting agenda is consistent from week to week, the group knows what to expect and facilitation should be easy. Often the facilitator is someone who has a really interesting rabble rouser for the group.

Rabble Rouser: We need to engage everyone. For meetings with lots of new members, a rabble rouser means posing a provocative question or statement to the group. It usually relates to climate change, group dynamics or personal motivations for this kind of work. Then whoever is facilitating instructs everyone to find a few people they don't know and discuss for about 5-10 minutes. After the basics (name, year, etc), small groups discuss the topic at hand. The small group ensures that everyone remember a few new names (both for old members and new), that everyone gets a chance to contribute, and that hopefully some insights are made into the topic at hand.

For meetings later in the semester, the rabble rouser can be more focused on talking about a pressing topic or insight to the group for 5-10 minutes.

Difficulties: As exciting as these discussions are sometimes, a poorly done rabble rouser can drain the groups energy. Topics are not always engaging, and doing the same thing week after week becomes tedious. Some members have started skipping this section of the meeting, and the energy level of discussions has decreased noticeably after a full semester of rabble rousers and small discussions. Switch it up somehow!

Announcements: A brief time to make announcements about upcoming events, news or updates on outside groups. Its important to connect the group to the larger community of social action.

Difficulties: Announcements can drag on. Facilitators (and everyone else) need to help the meeting flow.

Project time: Project time is open space and the defining element of how our group functions. This is the free market of ideas. At this time anyone can announce a strategic campaign or project, briefly describe what it is they are hoping to accomplish and what they want help on, and then name a corner of the room to work on it. Projects and leaders that sound really appealing attract a lot of people, and those that are not as exciting or important to the group don't get any help.

- It means that every participant is engaged in a smaller, working group sized planning discussion. Ideal group sizes range from 4 to 8 people.
- Campaign or project timelines can be flexible (2 weeks or 2 semesters).
- Anyone can suggest a new project at any time, and group members are empowered both by doing and watching this.
- Leadership is based on collective empowerment rather than being asked to fill a role.
- Projects are not centrally directed.

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"We like the teamwork idea, but Mr. Superstar won't let us play with his ball."

Advising: Group leaders (seniors) should often meet with promising members outside of meetings to get to know them, offer support and advice, and occasionally urge them to think about taking on some specific kind of project. Leadership and meeting facilitation are both learned by many people in the group at once, and group leaders can offer each other specific insights into what works and what doesn't.

Difficulties: An action oriented meeting doesn't necessarily lead to big, ambitious ideas. Without a strong and well guided visioning process, project ideas can be small and unimaginative. The group is less able to rally all of its members energy around one specific cause to tackle a very big campaign. Conversely, when the whole group is really needed to make something happen, everyone can be convinced to help.

Closing: We don't have a good norm for closing the meeting. We tried to copy Middlebury, which always has a chant or song at the end of the meeting, but that hasn't caught on with Thursday Night Group.

3.2 Role for Leaders:

Ideally, open space technology can allow a group to unleash its energy with no formal leadership hierarchy involved. In some cases there might need to be responsibilities designated – secretary or book keeper – but president or director, or even coordinator, should ideally not be one of the designated roles. Yes, each meeting requires some kind of facilitation, but that facilitation can rotate, with regulars often encouraging and assisting new ones. Most project groups will have more defined roles to actually get work done. But the overall open space can be open to input and energy from anyone and everyone without defining hierarchy.

Of course leaders invariably exist. In any large gathering there are going to be personalities that assume different roles. Some people might prefer a more reflective participation level in the large group, but work hard on individual projects. Others might have a remarkable and exciting large group presence that contributes energy to the meeting. All should be welcome to contribute their strengths, while also recognizing and consciously moderating their participation. For instance, those with strong personalities should remember to allow others participation, and not just by coaxing others, but also by stepping back to just listen and learn.

It's important to recognize that leadership often matters more outside the meeting than with the meeting itself. True leaders devoting time and energy into action outside of meetings, either in the form of project organizing and/or in engaging the group. These various leadership tasks shouldn't be forced. Rather, people should mutually encourage each other to contribute what's best for them. For instance, no one should necessarily be responsible for week to week "recruitment" if there's no one with a clear and productive sense of what that might mean (aside from

rotating who sends a reminder email). A specific recruitment event is one thing, but designating one person's energies towards always pushing others to stay engaged can become a burden and decrease efficacy. Throw a party, host a dinner, but don't make it someone's job. Instead, make it everyone's job and if its important, it will happen.

If you're reading this, you're probably a leader. Much of this guide is about moving power from the leader to the group, and you may be wondering what your role actually is. You will probably be the most active and energetic participant in the open space, and that's fine. But we really want opportunities for leadership to arise where we never expected them to.

Group Development over time:

Thursday Night Group built its identity over time. It started with smaller meetings of 15-20 people, but the same principles applied. During a lot of the early meetings we experimented with how to recruit people, facilitate, open and close the meeting, but the basic elements of open space were always there. In addition, core leaders spent hours every week talking to friends, meeting new people and promoting the group because they really believed in it. Core leaders also constantly sought feedback from group members and people that went once, or never went. Those insights were and still are the most valuable in shaping a group open to all. Constant input of energy, and a constant self-evaluation is a central key to any group's success.

Inclusiveness and Diversity:

Open Space groups promote openness, inclusiveness and diversity, but they are not inherently open, inclusive or diverse. Like any group, the ultimate dynamics will be determined by the people who are there. However, within open space you can do a lot to promote inclusiveness. Think of creative rabble rousers to get the group thinking about inclusiveness. A decentralized structure is ideal for working in partnership with multi-cultural groups, and having a large group in general puts less pressure on individuals who might feel out of place.

4.0 Bigger Events: The User-Based Conference

The power of a user-based conference is the sense of ownership and commitment that those involved feel because they shape the discussion and agenda, and the openness with which participants approach big questions with their own creative solutions.

You can run entire multi-day events using the principles of Open Space Technology, although the practice is a bit different. In most conferences a small group of planners decides before-hand what will happen in the conference and then they get people to come based on the attractiveness of the program. Open Space events are shaped and directed by participants. This doesn't rule out speakers, set events or even an agenda, but the central features in the developing process until the conference starts and the content is the people who attend.

User-based conferences are often difficult to set up because potential participants often don't understand them. Organizers create a way for participants to create the event, and by creating it take ownership of its outcome. User-based conferences are also particularly powerful when they unite diverse groups of actors who might not otherwise work together. Workshops and trainings appropriate to smaller groups are important if that's what people want, and fit easily into an Open Space setting.

Here's how the Open Space principles apply to a conference:

4.1 Whoever comes are the right people: It's really difficult to convince people to come. If this is the first time you and most of the participants are doing this, you are not going to convince everyone that this is going to work. Macalester students planned a citizens conference with Open Space (with no prior experience). Here's a sample conversation with potential attendees:

Student "Are you interested in joining us in our upcoming [conference name] on [date]?"

Potential participant (pp) "Maybe. Can you send me the agenda?"

Student "Well, we have some ideas, but it really depends on what people who come want to do"

PP "how about a list of speakers?"

Student "The speakers will be whoever attends working with each other on whatever they think is important [in this case, to define a vision and action plan for a sustainable Minnesota that's leading the way in global warming solutions]"

PP "Oh ... that's a bit unusual ... So who's coming?"

Student: "That's pretty much what I'm calling you about"

In general, people don't trust that a group of ordinary people just like them, without direction and structure, can come up with amazing, meaningful, empowering, and fun outcomes. Many people won't commit, and that makes your work hard. On the plus side, those that decide to come will be the ones who appreciate the concept and trust the process. To facilitate trust, personal introductions and stories are very powerful. Connecting with people is, after all, what this is all about. Nevertheless, a large turnout is ambitious. Whoever comes are the right people, and how many come is the right number.

4.2 Whenever it starts is the right time: For the purposes of a large event, this principle translates best into: the schedule is flexible, and can be changed if what happens at one point in the conference suggests a new direction for what's next. To change the schedule you need to be good at reading consensus of large groups, or ask for help, but the possibility is always there. Also, remember that these people coming together, here and now is a significant achievement itself.

4.3 Whatever happens is the only thing that could have happened: Don't pin all your hopes on something really incredible happening, and don't define that as the objective. If participants feel that such an outcome is demanded, they are less likely to open themselves to the possibility of it. But the possibility is there. Watch for opportunities for it. The best possible outcome will happen if you let it and don't try to force it.

4.4 Whenever it's over, it's over: You can't force anyone who comes to participate after the event is over, and if you could it wouldn't be too productive or empowering. Like the conference itself, we should work to avoid participation in follow-up that is based on guilt or peer-pressure for not participating. Instead, try to foster follow-up that comes naturally through the energy and collective vision of the group. Simultaneously, we have to come to these types of

events open to committing to something really big if the opportunity to work together arises. If the work you are trying to do is powerful enough and meaningful enough to have a future, then it will be irresistible. If it doesn't, we can fight to keep doing it but it won't be sustainable and probably wasn't really what we should be doing in the first place.

When planning a user-based event, give as many opportunities as possible for participants to shape the initial plan and vision for the event, suggest content items, and contribute to what it will be beforehand. A registration survey or good introductions can help to point out assets (concrete skills, knowledge etc.) the participants have and what they will find useful and help the process of bring the event together. Make it as clear as possible the type of collective direction that Open Space requires and thrives on. Make your positions clear, but that this event is above all an open space for everyone.

Setting the tone of a conference can be more difficult than a meeting. Here is a suggested outline of how to get things rolling:

1. Introductions - really brief, name, school, funny fact
2. Logistics - run through briefly to get them out of the way and make sure everything is clear
3. Clarify the way the conference will be structured, particularly the open-space dynamic
4. Establish ground-rules/ guidelines in a creative and innovative way (see below)
5. Do a second rounds of introductions, this time with a deeper question like "what brings you here?" and/or "tell us something that you've done that's really important to you". If the group is large, break up into small groups for this.
6. Frame the group and the attitude of the conference - diversity, uniting strengths, acting boldly, openly, holistically. Talk about the potential for breakthrough outcomes, and the acceptability of less (whatever happens is the only thing that could have happened), and recognize that sense of presence in the moment and potential for continuation (whenever it starts and whenever it's over). Recognize who's here and who's not here (whoever comes ...).
7. Generate a list (does not have to be written, verbal sharing gives the group a good idea) of what people want to get out of the event.

CONCLUSION

Open Space can do as much or as little as you want it to. We are global warming solutions, and we have a lot of work to do. To empower more people to start acting as global warming solutions, we need to find a way to help them realize their potential. Open Space is an important way of thinking about doing that, but it is only a starting point. And open space is also a process to more fully realize the potential of us, the leaders.

Just as Open Space is the beginning of a process, this document is a beginning in our movements understanding of how to be effective and engage each other. We need more examples, more stories and more refinement. We need to keep learning. Please contribute how you can, and do so publicly. ItsGettingHotInHere.org is an excellent place to have the discussion, as well as with your school group and friends. This is the beta version. We'll have a better one in a few months.