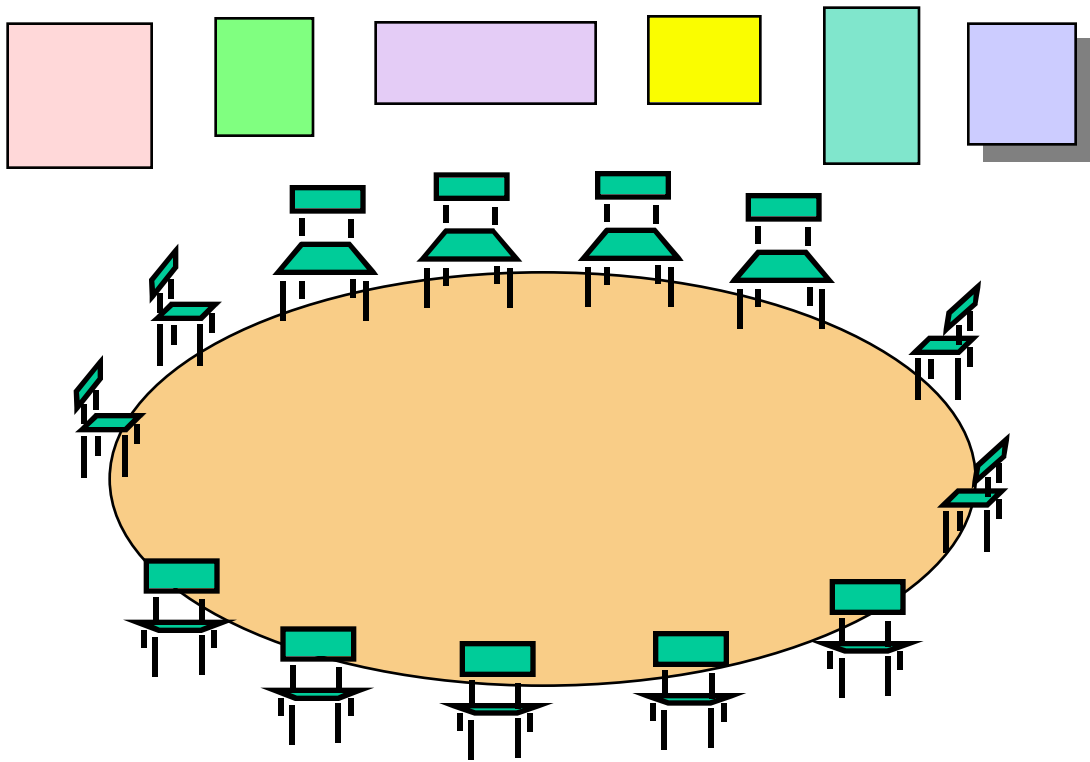


return to: _____

OPEN SPACE TECHNOLOGY



*Practice Resources for
Inviting Organization*

Peace Edition, Spring 2003

For Openers...

There are three ways of trying to win the young. There is persuasion, there is compulsion and there is attraction. You can preach at them, but that is a hook without a worm. You can say "you must volunteer," and that is of the devil. Or, you can tell them, "you are needed," and that appeal hardly ever fails.

--Kurt Hahn, founder of Outward Bound, father of adventure education

If a living system is unhealthy, the way to make it more healthy is to reconnect it with more of itself.

--Francisco Varela, biologist

Play for more than you can afford to lose, and you will learn the game.

--Winston Churchill

We must become the change we wish to see in the world.

-- M. Gandhi

...work is love made visible.

--Kahlil Gibran

I hate quotations. Tell me what you know.

--R. W. Emerson

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Edition Note: This "Peace Edition" is the 8th edition of the training and practice workshop manual. Early editions were numbered. Then the Asian Edition went to Hong Kong and Singapore. The World Edition went to Ireland, India and Australia. On Bowen Island, off Vancouver BC, it had to be the Hockey Edition, to fit Maple Leafs fan and workshop partner Chris Corrigan. For the workshops in Chicago (Oak Park) and Phoenix, Arizona we got more clever with the Frank Lloyd Wright edition, Wright having left his mark significantly in both places. And now, in March of 2003, this Peace Edition will be the first edition posted online, in hopes that it will go everywhere. May we all invite peace!

Workshop Agenda

Day One: The Spirit of Open Space and Inviting Organization

Welcome, Introductions, Agenda

Morning Plenary: Inviting Organization Emerges in Open Space

OPEN SPACE: Inviting Life (Chaos): Issues and Opportunities for Living in Open Space

Afternoon Plenary: Inviting Organization into Open Space Technology

Evening News

Group Dinner (optional)

Day Two: The Practice of Open Space and Organizing Invitations

Morning Announcements

Morning Plenary: Getting Ready for Open Space (How to Plan Events)

OPEN SPACE: Inviting Organization (Order): Issues and Opportunities for Using Open Space

Afternoon Plenary: Going Beyond Open Space (How to Practice Action)

Closing Circle

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

-- An Australian CEO

The Spirit of Open Space

We shall not cease from exploration
And the end of all our exploring
Will be to arrive where we started
And know the place for the first time.
Through the unknown, remembered gate
When the last of earth left to discover
Is that which was the beginning;
At the source of the longest river
The voice of the hidden waterfall
And the children in the apple-tree
Not known, because not looked for
But heard, half-heard, in the stillness
Between two waves of the sea.
Quick now, here, now, always --
A condition of complete simplicity
(Costing not less than everything)
And all shall be well and
All manner of thing shall be well
When the tongues of flame are in-folded
Into the crowned knot of fire
And the fire and the rose are one.

*T.S. Eliot
Four Quartets, Little Gidding V, (last verse)*

What is Open Space Technology?

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

see also: <http://www.globalchicago.net/wiki/wiki.cgi?OpenSpaceTech/EssentialElements>

Open Space Technology: An Executive Summary

What is Open Space Technology?

Open Space Technology is one way to enable all kinds of people, in any kind of organization, to create inspired meetings and events. Over the last 15 years, it has also become clear that opening space, as an intentional leadership practice, can create inspired organizations, where ordinary people work together to create extraordinary results with regularity.

In Open Space meetings, events and organizations, participants create and manage their own agenda of parallel working sessions around a central theme of strategic importance, such as: What is the strategy, group, organization or community that all stakeholders can support and work together to create?

With groups of 5 to 1000 -- working in one-day workshops, three-day conferences, or the regular weekly staff meeting -- the common result is a powerful, effective connecting and strengthening of what's already happening in the organization: planning and action, learning and doing, passion and responsibility, participation and performance.

When and Why?

Open Space works best when the work to be done is complex, the people and ideas involved are diverse, the passion for resolution (and potential for conflict) are high, and the time to get it done was yesterday. It's been called passion bounded by responsibility, the energy of a good coffee break, intentional self-organization, spirit at work, chaos and creativity, evolution in organization, and a simple, powerful way to get people and organizations moving -- when and where it's needed most.

And, while Open Space is known for its apparent lack of structure and welcoming of surprises, it turns out that the Open Space meeting or organization is actually very structured -- but that structure is so perfectly fit to the people and the work at hand, that it goes unnoticed in its proper role of supporting (not blocking) best work. In fact, the stories and workplans woven in Open Space are generally more complex, more robust, more durable -- and can move a great deal faster than expert- or management-driven designs.

What will happen?

We never know exactly what will happen when we open the space for people to do their most important work, but we can guarantee these results when any group gets into Open Space:

1. All of the issues that are MOST important to the participants will be raised.
2. All of the issues raised will be addressed by those participants most qualified and capable of getting something done on each of them.
3. In a time as short as one or two days, all of the most important ideas, discussion, data, recommendations, conclusions, questions for further study, and plans for immediate action will be documented in one comprehensive report -- finished, printed and in the hands of participants when they leave.
4. When appropriate and time is allowed for it, the total contents of this report document can be focused and prioritized in a matter of a few hours, even with very large groups (100's).
5. After an event, all of these results can be made available to an entire organization or community within days of the event, so the conversation can invite every stakeholder into implementation -- right now.
6. AND... results like these can be planned and implemented faster than any other kind of so-called "large-group intervention." It is literally possible to accomplish in days and weeks what some other approaches take months and years to do.

The good news, and the bad news, is that it works. Good news because it gets people and work moving, bad news because that may mean lots of things are going to be different than before. Wanted things can appear, unwanted things disappear, and sometime vice versa -- but that's how life is.

In short, then, Open Space brings life back to organization and organizations back to life.

Opening Space for New Life at Work

Michael Herman

**Reprinted from The Works Magazine, Summer 2001, published by the
Crossroads Center, Chicago. (insert 2-page magazine reprint)**

insert page 2 of 2 - crossroads opening space for new life article

Working in Open Space: A Guided Tour

Our last grasps at controlling people and organizations are slipping into the swirls of constant change and we are quickly discovering that in this new reality, simple conversation qualifies as real work -- and is essential for powerful, profitable action. As specialization and customization increase, complex webs of relationships and information emerge, pressure for frontline decision-making and on-time delivery rises, and the best work of every individual becomes essential for overall success, it's never been more important to be connected -- and reconnected -- with our partners at work.

Open Space Technology is a simple, powerful way to catalyze effective working conversations and truly inviting organizations -- to thrive in times of swirling change. What follows is a unique narrative tour of an Open Space event that highlights those things that are common to nearly every Open Space meeting AND points out a number of ways of and possibilities for fitting Open Space into any organization, setting or situation.

Think of this story as an Open Space adventure with a seasoned, but blindfolded, guide...

Welcome to Open Space...look around, please, and see who's here. Imagine that you're sitting in a circle of friends, colleagues and perhaps some strangers, too. It might be just a dozen of you for a one-day working conversation, but perhaps it's 120 or even as many as 1200 gathered for a 2 1/2-day strategic conference. If it's just a few, we might be in your office conference room or a small hotel meeting place. If it's a very large group, we're likely in a hotel ballroom, a high school gymnasium, or even a warehouse facility that your company has cleared out especially for the work of this conference.

However many are here and wherever we might be, our chairs are certainly set in one large circle. Even if the circle has several concentric circles, the room is set, from the start, so that everyone can see and hear everyone else. The middle of the circle, even if it's very large, is empty and open. There are no tables or podiums, but you can see that there are half sheets of flipchart paper and markers on the floor in the center. Then you notice that someone has apparently already been busy with these markers, as there are handwritten posters hung on every wall...although there is a large (and a little suspicious) blank area that fills most of one wall under a banner that says, simply, "marketplace."

Someone sits down next to you, probably an old friend, somebody you know, but perhaps haven't seen for awhile. You begin a conversation, "well, hello...good morning...I didn't expect to find you here...gosh, how long has it been, how are your kids...well of course I should have known you'd be interested in this...how did you hear about it...I thought of you when I first saw the invitation...glad you were able to move your schedule to be here...wouldn't have missed this for the world...what do you suppose is going to happen...not sure, but I know we need to do something about..."

Your conversation is repeated around the room as others arrive and connect. They join you sitting in the circle or stand at the edges, talking with people they know or people they are connecting with for the first time. Some are sitting quietly by themselves, taking in the whole scene, glancing at the notes they've brought, or perhaps having a look at a one- or two-page handout that might have been placed on every chair. There is a table with coffee and juice, doughnuts, bagels, fresh fruit. Everyone is eating or drinking something.

And everyone is here for a purpose, having received an invitation and having made whatever simple or grand arrangements it took to get themselves here this morning. Everyone is here because they've chosen to be here, because the theme or issue or question at hand is something they have real passion about -- and because they saw this gathering as a unique opportunity for connecting with others who are eager to learn about, plan for, and take action in an area that they see as critical to the success of their own interests, the work of their organization(s), and/or their relationships with colleagues, customers or suppliers.

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

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

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

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

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

So, as you look around at the crowd assembling now in the main meeting room, you are aware that everybody in this diverse group somehow received the same invitation, that everybody here seems to have some connection to the theme question, but that nobody seems to really know exactly what will happen next. The level of anticipation and energy rises as the stated starting time arrives and seems to pass, the noise level in room rises, too -- and then a totally new sound rings through the room.

Someone is ringing a small set of bells whose chiming pierces every conversation, even if the group is several hundred. This immediately invites and focuses everyone's attention on the one with the bells, who is standing with a person who nearly everyone in the room knows, or knows of. This familiar person is the leader of the sponsoring or planning group. She introduces herself, welcomes everyone into the meeting and into the circle, perhaps adding a very brief word about why we've all come here today. Then she introduces the bell ringer as the meeting facilitator and takes a chair in the circle with everyone else.

At this moment, the facilitator is, quite possibly, the only one in the room who has absolutely no doubt whatsoever that this group of 12, 120 or 1200 is on the brink of filling that large, suspiciously empty wall with a detailed agenda that will keep everyone working, playing, and learning for the duration of the conference -- on the brink of what most (at this point) would call the impossible. The sense of anticipation and energy is so high in the room that even the sponsors and planners of the event are a little edgy, and eager for the agenda to appear. But first, a few instructions must be given, a few simple principles introduced, one basic law enacted, and a few logistical items explained. All of this, you notice, is also presented on the handful of posters that are scattered around the room.

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

theme. He makes it very clear that all of these breakout session topics will be proposed by us, the people now sitting in the circle. The logistics of this are equally clear.

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

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

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

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

Having done the impossible in the first hour, the energy level is pretty high now. The facilitator gives a few more instructions and the whole group moves to the wall and signs

up for the sessions they want to attend. Minutes later, the first sessions start without any announcement or instructions, because everybody knows where they need to be. Suddenly the large circle is many small circles, in the corners of the room or in separate breakout spaces, each working on some important part of the main theme. Every session has been proposed by someone who really cares about that item and has taken responsibility for making sure it gets addressed. In longer meetings, the convener is also responsible for recording the main points and conclusions reached in his or her session.

As the first sessions finish, at roughly the scheduled time, the second sessions begin. If the work isn't finished, it continues or a sequel is scheduled. Some people have spent the entire 1 1/2-hour session on one topic; others have bumblebeed or butterflyed around, connecting different issues. Everything is moving -- people, ideas, resources, beliefs, relationships -- but it all revolves and relates to the intention stated in the invitation. This motion ebbs and flows, but the work continues, session after session. In multi-day meetings, everyone also assembles in the morning and evening for short "news" sessions, where things like new sessions, major breakthroughs, and dinner plans can be announced easily.

In some events, especially longer events, the proceedings are captured by computer. The person who convenes a session also takes responsibility for capturing the notes and typing them into the computer. The rule-of-thumb is that one day in Open Space will get you a lot of great discussion, two days will give you time to capture what happens in a typed proceedings document, and a third day (usually a half-day) will allow a more formal convergence to specific plans for immediate action.

In some cases, smaller groups might create handwritten proceedings to be typed up after the event. With larger groups and longer meetings, where follow-up and follow-through is critical, the typed proceedings can be dumped into an intranet format where future meetings can be announced and progress reports added onto the original proceedings. Over time, these proceedings on an intranet system also make a powerful orientation and training resource, at both project and organizational levels.

In the closing circle, everyone in the room attests to the fact that, together, we have done what most thought was impossible. Specifically, we have...

- identified, explored and addressed all of the most important issues,
- gathered new ideas, resources and people and connected them to these issues,
- documented all of this in somewhere between 5 and 500 pages of notes and next steps,
- established strategic themes, clear priorities, immediate actions steps
- distributed all of this information to a (re)energized and action-ready community of people
- empowered them to tell that story to the rest of the organization, community, or world, and
- seeded cycles of invitation that will continue to pull people into places where they can maximize their own learning and contribution.

Longer term, with care and feeding, the realities and practicalities of the Four Principles and The Law of Two Feet can permeate the organization, inviting people at every level to turn attention into value, planning into vision, movement into learning, management into leadership that makes a real difference. These things are, however, easy to see and tough to measure.

Therefore, you'll need to measure the success of Open Space the same way you measure everything else you do, in terms of product development time, process cycle time, employee and customer turnover, total sales or volume of service, profit margin and any other ways that make sense. After all, we don't "Do Open Space" just because it's fun. We do it to invite important projects, relationships, strategies and measurements to move quickly in positive new directions.

Hailed for its utter simplicity -- and it's power, Open Space starts with open-minded leadership, an issue that really matters, and an invitation to co-create something new and amazing. What happens in the meetings is high learning, high play and high productivity, but is never pre-determined. And what emerges, over time, is a truly inviting organization, that will thrive in times of swirling change.

Where Has Open Space Technology Really Worked?

(reprinted from the stories posted at www.globalchicago.net/ost)

- In 1991, US West used OST for a 3-day, 175-person labor-management summit meeting to resolve escalating contract conflicts, avert a major strike, recover from a damaging flood, and prepare themselves for telecom mergers and the buildout of the internet. Labor pushed for the meeting, but both sides were well-served by the results.
- AT&T fast-tracked 10-months of design and planning work into ONE 2-day contractor summit when they were offered the opportunity to build their pavillion in the center of the 1996 Olympic Village in Atlanta. Twenty-five contractors came into the meeting with lots of difficult history and a blank page to design from. They produced a superb design, a full set of working drawings, and managed to have quite a bit of fun in the process.
- Some years ago, TransNet?, the national transportation company of South Africa used OST to help build community connections and lay the groundwork for cooperative business activities in the midst of post-apartheid confusion. One meeting brought 300 senior transportation executives together. Another gathered 80 community choir leaders.
- At a time of similarly-intense confusion and conflict, peace activists and organizers in Jerusalem and Palestine are working together to bring people together in Open Space.
- Rockport Shoes held a 3-day, 300-person company-wide strategy conference in one of their warehouses and stumbled onto a couple of brand new product lines that netted \$18 million in their first year of sales. The idea came from the security guard and made the previously quite skeptical CFO very happy.
- The Agile Software and Extreme Programming movement is encouraging a whole new way of software development that looks very much like OST. The marketplace wall becomes a table top with 3x5 cards, breakout groups become pairs of programmers, and morning and evening news sessions become 'stand-up' meetings between programming iterations. This new approach delivers working software every two weeks instead of every two years! [AgileXpUniverseProceedings](#) | [AgileXpUniverseFacilitatorNotes](#) | [AgileXpAndOpenSpace](#) | [AgileXpParticipantComments](#) | [MichaelHerman](#)
- Wesley Urban Ministries in Hamilton, Ontario, adopted OST as the basis for organizing and managing their whole, 100-person staff. Over the next 3 years, they increased services delivered by 50%, with no added resources. On top of that, they had turnover of exactly 0%, in an environment known for high stress and burnout.
- In one of many OST events at Boeing, engineers used OST to streamline operations and simplify communications across the myriad groups responsible for designing and building pressurized airplane doors. The conference was run simultaneously in Seattle and Wichita, it's two major door-assembly sites. Another conference brought the full array of human resources functions together to synergize efforts on "people issues."

- In Racine, Wisconsin, 35 young people (ages 12-20) gathered for one 4-hour, afterschool conference in Open Space. As a result of that meeting they initiated a youth art newsletter, a downtown, lakefront skateboarding park, and the largest YMCA Earth Service Corps chapter in the country. They called themselves 'Youth Action,' used OST at all their meetings, and eventually ended up introducing OST to young leaders from all over the USA. <http://www.globalchicago.net/ost/invitingorg/25youthaction.html> | MichaelHerman
- In the midst of post-911 budget cuts and other major change issues, Peoria School District 150 held a 3-evening, 200-person summit meeting to create a community-wide vision and set new priorities for revitalizing their inner-city schools. The meeting was well-covered by local broadcast and print media, the 100-page proceedings was publicly available via the District's website, and the top priorities identified on the third evening became the working agenda for their new superintendent and school board.
- The school district in Fairbanks, Alaska (covering an area the size of the entire state of Connecticut) held a 2-day, 250-person conference on 'Becoming a Peacemaker.' Half the participants were students in the middle and high schools (ages 13-18) and all participants had some experience with mediation and conflict resolution. The kids did exceptionally well in Open Space and one high school student led a series of four breakout sessions to create an entire suicide prevention program that for the middle school students. The statewide suicide prevention hotline was up and running within weeks of the conference.
<http://www.adsa.ws/BAP/4.19.02OSinFBX/FBXBAPApril2002.htm> | <mailto:jsmith@mosquitonet.net>
- The 'Peacemakers' conference in Fairbanks was followed by a 2-day OST training and practice workshop, attended by about 60 youth and adults. Six months later, they reported that they were holding 1-3 OST meetings per week, in and around Fairbanks.
- As I was spending time with friends a few evenings ago, talk turned to what we were doing and thinking about. I talked a bit about the Youth Summit I had been involved in that day, and about much I was enjoying the OST process. A friend asked me what OST was. As I began explaining it to her, a look of recognition suddenly passed across her face and she said, "Oh, I know what that is, we did that at our teacher in-service a few weeks ago." I was surprised, because I hadn't heard about it. As it turns out, the in-service had involved staff from three of our elementary schools. When I asked her how it went she replied "it was the best in-service we've ever had." JulieSmith, Fairbanks
- At Ridgeview Medical Center in Minnesota, a physician administrator has been leading a series of OST meetings, attracting 30-50 people, in order to catalyze and support a hospital-wide, cultural and operational shift to 'patient-centered care.'
- One year after it's founding, The Crossroads Church, in Kansas City, Missouri, invited their entire congregation into Open Space in order to establish strategic direction and set operational priorities for the coming year. They now run an annual 'direction-setting'

retreat which is attended by almost all parishoners and in which they dissolve, review, re-establish and re-populate their entire operating committee structure.

- In January 2000, 175 people gathered in Open Space from the poorest urban neighborhood in Canada to Discuss "Improving the Lives of Aboriginal people in Vancouver: Let's stop talking about it and let's start doing it!" In one day the group convened 47 discussion groups that led to an agenda for action that was still in place 3 years later. Homelessness, addictions treatment, improved child welfare practices, increased community governance over services and fighting child prostitution have all been issues that have been at the centre of the activity that has taken place since then. ChrisCorrigan

- In northern British Columbia in March 2002, two career fairs were held in Open Space with nearly 100 First Nations youth. The youth posted topics about issues that impact their future, and invited mentors from a wide variety of fields posted offerings introducing youth to careers in the military, social services, law, resource industries, information technology and post secondary education among others. ChrisCorrigan

- In October 2001, 250 Aboriginal youth gathered in Open Space together with federal and provincial senior officials from every province in Canada to update the National Aboriginal Youth Strategy. They proposed 45 discussion groups and prioritized six areas for action. The recommendations were presented by the youth to the federal and provincial ministers responsible for youth and were accepted as the basis for a renewed strategy. ChrisCorrigan

- A Health Services office at a major Canadian university used Open Space Technology to bring together faculty members and leaders from a variety of disciplines including medicine, dentistry, social work, nursing and physiotherapy to discuss the future of health services education focussing on patient needs rather than disciplinary distinctions. The gathering helped to clarify a number of issues and led to a great cooperation between faculties as they pursued a scenario of creating a joint faculty of health services. ChrisCorrigan

- On Bowen Island, a small island near Vancouver, Canada, an Open Space event looking at the future of Bowen in the year 2042 attracted 30 community members who discussed what they valued so much about their island and what it would take to live sustainably well into the future. Within a month of the meeting a Trust had been set up to lobby and raise money for the protection of the last parcel of undeveloped and privately held wilderness on the Island, a piece of land teeming with unique ecosystems and valued by islanders for its role as a place to renew the spirit. ChrisCorrigan

- In 1998 Parks Canada used Open Space to bring together its entire administrative staff in a retreat to discuss issues and opportunities related to transition from being a government department to becoming a government agency. 120 people gathered in a park centre in central Manitoba and hashed out dozens of issues related to the transition, preparing them for the upheaval that was to envelop the department March 1999 when

the transition took place. The retreat dealt with immediate issues but also took the long view, and several years later issues that were dealt with in the retreat were only beginning to arise, and yet none of these were surprises to those who had anticipated them in Open Space. ChrisCorrigan

- In 1993, my colleague and I launched an organizational experiment. Our intention was to create two organizations--one in Haiti and one in the US--which would work together to promote justice and peace by fostering transformative learning among Haitians and N.Americans. We chose a non-hierarchical structure at a staff level with hopes of avoiding paternalistic tendencies which frequently characterize international development efforts, and lead to disempowerment and ineffectiveness. After nine years in Open Space, Beyond Borders and Limye Lavi Fondation continue to function without a hierarchy and have become models to other organizations working in Haiti.
<http://www.beyondborders.net> | JohnEngle?

Mission: Control? (by Harrison Owen)

At the beginning of a new year, it is customary to make resolutions to stop what we shouldn't be doing and start what we should be. Collectively this list of "do's and don'ts" constitutes our New Year's Resolutions. As we look forward to the approach of a new millennium (forget about new century or new year), it is major resolution time.

You must make your own list, but mine will start with a real biggie: give up control -- or at the very least, give up the flawed understanding that we are, or should be, in total charge of our lives and organizations. And if not us, then somebody else--for surely somebody must be in charge of this mess.

The issue is not control per se, but what I might call inappropriate control, the sort that occurs when control is understood to be a modern-day version of the Divine Right of Kings. In short, it comes with the title. Thus, if your title is CEO, president, boss, or manager, the presumption is you are totally in charge. And if you lose control (God forbid) you are typically out of a job.

This notion of total control is reinforced in a number of subtle and not-so-subtle ways. Under the heading of not-so-subtle is the typical performance evaluation that considers such important factors as:

- 1.How many people do you control?
- 2.How long have you been in control?
- 3.How well do you do it?

If the answers to these questions are "Lots of people," "For a long time," and "Very well," you go to the head of the class and are usually rewarded with a high level of compensation.

A more subtle reinforcement of total control comes from the rest of us who are not in charge. If you are not in charge, after all, you are not really responsible. When business goes south, we all know who to blame--and it isn't us.

Actually, giving up control, as we used to think we had it, should be a no-brainer. On the scale of causative factors for executive burnout--to say nothing of genuine soul pollution--the compulsion to keep tight control has got to head the list. And of special interest to the readers of this journal, control as we used to think we had it is a real killer when it comes to quality and participation.

How did we get into this mess?

If some of us are coming to appreciate the limitations of control, it is reasonable to ask how we got into our present predicament. The notion of tight control, or as some would

have it, an ideal of absolute control over our organizations and their functions, originates with the concept of a closed system. Closed systems are to be contrasted with open systems. The former are significant because in theory they are hermetically sealed from their environment, with everything passing in or out and, indeed, all that transpires within, being subject to the closest scrutiny. (Might we say "control"?)

In truth, a closed system is a scientific conceit, useful under certain experimental conditions but never to be confused with reality. For example, if one is seeking to understand the function of some electronic particle, an experimental environment is created in which all other particles-uncontrolled variables-that might confuse the experiment are excluded.

Practically, this means building walls of lead and concrete to keep unwanted critters on the outside. But there is a catch. Despite the best-laid plans, inevitably something almost always gets through. This is where hope and faith come in. It is "hoped" that the intruders will exercise such a small level of disturbance that the experiment will be valid. Faith is required to believe that the experiment is in fact uncontaminated, until such time as this faith is proved unwarranted. The experiment must then be redone, but this time with more lead and more walls.

The point here is not to denigrate the scientific enterprise, which has demonstrably done very well over the past 100 years or so. At issue is the notion of a closed system, and the fact that it exists only as a theoretical construct (conceit), which is useful in certain laboratory conditions-but never to be confused with reality, and certainly not to be taken as an absolute.

From beaker to boardroom

The road from the laboratory to the boardroom is a strange one. For somehow a theoretical construct has turned into a pillar of organizational belief-to the effect that our organizations could be viewed as closed and that control might ideally be exercised in a total or absolute fashion. Needless to say, nobody ever quite got there, but that was the ideal.

To the best of my knowledge, the history of this curious turn of events has yet to be fully written, but when it is, some of the major milestones may be as follows:

1.Tailoring by Taylor. My version of the story begins with the invention of scientific management by one Frederick Winslow Taylor, just about 100 years ago. Taylor was an engineer who applied the principles of his trade to the design of more productive systems consisting of machines and human beings. Through endless time and motion studies, the holy grail of efficiency was pursued, and it sometimes seemed that the only difference between machines and humans was that the former didn't get tired, rarely complained about working conditions, and never suffered hurt feelings. In an ideal world, human

beings would measure up to their mechanical counterparts. In the interim, however, some form of compensatory treatment was required.

2.Skinner on best behavior. Following World War II, B. F. Skinner came up with what seemed to be an ideal answer-radical behaviorism and its practical application: the Skinner Box. Experimental subjects (usually animals) were placed in a closed environment (a box) and rewarded for appropriate behaviors. Here was a perfect way to control the deviant human, so that the ultimate boons of efficiency, effectiveness, and profitability might be had.

Doubtless, I have unfairly pilloried both Taylor and Skinner, for their contributions were both more subtle and less draconian than depicted. I do not, however, believe myself to be grossly in error when it comes to the residue of their thought and practice, particularly as it shows up in the minds and conversations of any number of managers and executives of my acquaintance.

3.Can you say "control"? The ideal corporation occasionally sounds strangely like the ultimate Skinner Box with a floor layout by Taylor. Control, control, control -- most recently chronicled by none other than Dilbert. We have obviously come a long way since the glory days of Taylorism, interpreted by the principles of radical behaviorism. But it seems that old habits die hard. Especially something as addictive as the thought (hope) of really being in control.

4.The process panacea. Recently resurrected with new names and procedures, the search for control continues. Process reengineering held out the hope that we could finally do the detailed analysis necessary to understand our systems and pre-scribe their functions. Except for a few hold-outs, however, this latest panacea has apparently run its course.

Those interested in knowing why such a totally rational, and therefore appealing, idea such as process reengineering was bound to flounder need look no further than the latest publications from the chaos/complexity theorists and their organizational interpreters, particularly Margaret Wheatley. Life in general-and organizational life in particular-is simply too complex to understand. In a word, it boggles the mind. Adding insult to injury, just about the time we have it all figured out, chaos strikes, and it is a whole new ball game. So much for process reengineering and the search for the holy grail called control.

Open to alternatives

The quest for total control has recently taken a few hard whacks to the side of the head. There are some who feel that the pain is worth the potential gain, and that someday we just might get it right. For the rest of us, a search for useful alternatives appears to be in order.

In our search, we might consider an experience now occurring broadly across the planet. Just imagine: 500 people show up at 9 a.m. to identify and resolve the hugely conflicting issues affecting their large national organization. In less than an hour, they have identified some 150 such issues, organized a similar number of working groups to deal with those issues, and are off to work. At the end of 36 hours, the groups have made their contributions to the final set of proceedings (350 pages long), copies of which were available to all participants upon departure.

Prior to the meeting there was absolutely no work done on the agenda, there was one facilitator for the whole event, and he or she went off to take a nap once things got started.

What is the magic?

Some people call it Open Space Technology. More accurately, it is self-organization at work.

Open Space Technology is a deceptively simple approach to the organization of complex tasks. It was developed 12 years ago, and since that time it has been used with groups from five to over a 1,000-consisting of virtually every sort and condition of human being located on all continents.

In every case, Open Space participants are invited to sit in a circle, identify issues of significance on a community bulletin board, and get themselves organized in a common marketplace. Regardless of the group size, complexity of issues, or language (or languages) spoken, it always seems to work.

Typically, productive activity is taking place in less than 90 minutes. And the only way to bring everything to a shuddering halt is to attempt to control the process and the outcomes. It seems that being out of control is the only way to go—at least in open space.

The Open Space experience appears counterintuitive to many and profoundly wrong to some. We have all been taught that carefully planned agendas and tight control of the operative procedures are the only avenues to productive outcomes. And yet in open space, precisely the opposite turns out to be the case, and sometimes very profitably so. Seriously out of control, and very profitably so.

But just imagine what life could be like if we could regularly accomplish in two days what used to take ten months. Translated into increments of productivity, that would be something on the order of a 1,500 percent increase. Talk about competitive advantage. And if you don't want competitive advantage, how about just having a life?

With all the spare time we might gain, it might be possible to spend some of it with the kids, go on a vacation, and take a deep breath.

Aberrant experience?

The Open Space experience may be totally aberrant. Then again it may be pointing to something very useful.

For example, an AT&T design team found themselves in an awkward position. Their design for a \$200,000,000 project-the AT&T Olympic Pavilion-which had taken them 10 months to complete, had to be scrapped and redone. Unfortunately only a fraction of that time remained before the due date.

In two days flat, operating in open space, the design team went from a blank sheet of paper to working architectural drawings that they all agreed were better aesthetically than their predecessor. In addition, they were further along with actual implementation of the new design, for they were placing orders for materials even as they were doing the design. And last but not least, the team was still talking to each other -- useful inasmuch as they still had to build the pavilion. This was quality created through total participation, and most remarkable: nobody was in charge, nobody gave detailed instructions on how to proceed.

It's your choice. For myself, I take genuine pleasure-to say nothing of relief-in the apparent fact that letting go of control can have very positive results. It would be nice to think that Open Space Technology is the secret.

But the real secret is the phenomenon of self-organizing systems. Indeed, I find myself increasingly afflicted with the totally outrageous thought that there is no such thing as a non-self-organizing system. There are only a number of people who suffer from the illusion that they did the organizing, are in charge, and should maintain control.

And so my millennial resolution to give up control really is a no-brainer. I never had it in the first place.

Harrison Owen, President of H.H. Owen and Co., convened the First International Symposium on Organization Transformation and is the originator of Open Space Technology. Owen is the author of *Spirit: Transformation and Development in Organizations* (Abbott Publishing, 1987), *Leadership Is* (Abbott Publishing, 1990), *Riding the Tiger* (Abbott Publishing, 1992), *Open Space Technology: A User's Guide* (Second Edition: Berrett-Koehler, 1997), *The Millennium Organization* (Abbott Publishing, 1994), *Tales From Open Space* (Abbott Publishing, 1995), and *Expanding Our Now: The Story of Open Space Technology* (Berrett-Koehler, 1997). Owen can be contacted at 301-469-9269 or via e-mail owenhh@mindspring.com.

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The Inviting Organization Emerges

For years we've been surfing the edge of a space that's beyond command and control, often wondering who's in command and feeling quite out of control. In some business organizations, we've come as far as 'the learning organization,' but as often as not this means preach and teach, plan and sell, ask then tell -- all watered-down versions of command and control.

The literal meaning of 'education,' however, is 'to draw out' -- which starts to sound a lot like invitation to me. And as command and control continue to slip away -- into the vast open space of global business, international politics, and worldwide uncertainty -- the bad news is that invitation may very well be all that we have left. The good news, however, is that it may be all that we need. The same can be said about Open Space Technology. What follows is a personal, professional, and practical story of the inviting organization -- and how it is emerging in Open Space.

Opening Invitation IN Organization

For me, Open Space Technology is more than a facilitation technique; not just another trick in my bag. I came into it from a background in business finance (healthcare finance and leasing) and experiential education (wilderness/adventure with outward bound schools). As a facilitator of team learning and experiential teambuilding activities, I immediately saw Open Space as a way to make the 'real work' the teambuilding initiative. Forget the ropes, blindfolds, metaphorical framings, color-coded t-shirts and the coffee mugs emblazoned with gung-ho, all-together-now cliches. Open Space Tech was a simple, powerful way to walk into any size of group or organization, focus attention on the most important business issues, and invite everyone to learn and contribute as much as they could to their successful resolution. For me, it eclipsed the need for teambuilding altogether and made organization-building a practical, powerful reality.

About the same time I discovered Open Space Technology, I came to understand that I was most productive, most effective and most happy on those projects where clients had called to invite me into their work, rather than because I had called them and sold a project. Seeing this, I resolved to make invitation the central focus of my personal and professional practice. I practiced listening for invitations -- from the little intuitive pulls we all get to the more explicit "why don't you come to Philadelphia with me... we could co-present at this conference there!" It quickly became clear that invitations come to those who also invite, so I practiced this as well. Open Space Technology was essential in this practice, as it allowed me to invite everyone (literally) in my personal and professional circles into conversation and action on the issues and questions most important to me. even when we didn't have enough time in these gatherings to do formal action planning, it was clear that everyone present had been touched, moved, changed by our time together. How then, could they not act differently going forward? Indeed, in these times of rapid, even swirling change -- with complexity, urgency, diversity and the potential for conflict already high (and still on the rise) -- making sense, making meaning, making conversation qualifies as real work and creates real value.

Invitations raise the awareness, speak the truth, gather the resources needed to get real results. invitations communicate intention, even to those who won't or can't be present. invitations offer new language for describing the truth of what's happening. Invitations get people moving in the same direction, at the same time -- because those people WANT to move that way. In this way, invitations turn managers into leaders, and invitees into managers. If we see Open Space Tech as one way to practice the leadership art of invitation, is it any wonder that this technique has produced phenomenal results all over the world? When all else fails, it seems clear that everyone still works better and happier when they are invited into their work.

For me, the power of Open Space lies in its ability to invite invitation throughout an organization or community. It starts, simply enough, with one invitation extended by an individual or small group, to everyone and anyone they think will learn from and contribute to breakthrough progress on an important issue or set of issues. This invitation touches everyone who receives it and begins to inform their work. Those who choose to accept the invitation and attend the meeting are invited to post their own invitations to breakout sessions. This gives the original invitation a new level of detail and sets up the next conversations. After each breakout conversation, the participants document their conclusions and next intentions. The issues raised in these proceedings are clustered and prioritized, creating the next degree of detail, next set of invitations, and next round of working conversations. And in every conversation, participants automatically invite each other to see more, say more, and do more. Every round brings more people, more understanding, more alignment, and more action -- toward leadership and action everywhere.

An inviting story, for sure, but how do we DO it? The answer, it turns out, is deceptively simple. First, name your issue and say something about why you think it matters. Second, make a list of "guests" which includes everyone you need to REALLY deal with the situation at hand. Third, get a time, a space and some materials, including such technical items as an empty wall, chairs, markers, masking tape, and perhaps a few computers if you want to be fancy. Fourth, prepare for the care and feeding of the success story that you will create during this meeting. This might include plans to distribute proceedings copies, create a website, allocate funding, meet with senior managers, or hold followup meetings -- whatever it will take to keep this work moving forward. Summarize all of this in a crisp, clear and creative way and send it out -- and always, always, always -- be prepared to be surprised. Which is to say, try not to get your heart set on specific outcomes or solutions that are almost certain to be less than what the inspired creativity of your group will produce. Expect them to blow away expectations -- yours and theirs. This actually happens quite often in open space!

But, you say, breakthroughs happen all the time without Open Space Technology. And, yes, this is true. But if we look at what is really going on at the time of these breakthroughs, we find a lot of the the same basic conditions that we create naturally and intentionally with Open Space Technology. And at the heart of every breakthrough, large or small, we find people following their hearts, speaking their truth, opening to uncertain outcomes, and working with a spirit of learning, contribution and community. The energy of these people

is inviting, without their trying or even noticing, the resources they need to make their breakthrough happen. It's only later on that they create policies, procedures and position papers to defend their gains and later still that their attention turns to strategic plans, whole system change and maximizing shareholder value. Eventually, however, comes burnout, turnover, restructuring, data overload, and a need to create something new in organization - a need for an intentional return to the best of the old days, without sacrificing shareholder value -- a real need to pull it all, invite it all, together again.

This story is about people and organizations coming back together -- beyond learning, through open space, on our way to inspiration, along a path of invitation. After command-and-control, after preach and teach, after plan and sell, after ask then tell, we are discovering the simple power of "post-and-host" -- as in post strategic invitations and host strategic conversations. And in the open space beyond the learning organization, a new kind of organization is emerging -- the inviting organization, where inviting leadership literally calls us to the work we really want to do AND manages the work to be done, very literally, practically and effectively, by the issuing of open invitations. As we continue to shift from hierarchical monologue through planning dialogue to dynamic and diverse multilogue, everyone is invited to contribute and every voice matters.

In line with this emerging multilogue, this story is really a collection of stories. My intention is not to make them into MY story. Indeed, even the parts of this story that I have penned myself aren't *really* mine, as they merely echo and extend the work of so many others. My point, then, is that these stories, each one finished and whole in its own right, are OURS. My intention is to pull them into OUR conversation about who we are and where we're going next -- NOT to pull them into my story, or worse yet, my *argument* for how things should be.

My hope is that these stories -- old and new, science and religion, workplace and community, metaphor and checklist, each and all -- when taken together, will give us fresh insights and new languages for working together in the open space, the grand uncertainty, the creative chaos, the passion bounded by responsibility and the spirited universe that we all already know as life. This is the view that I come back to again and again, to help me appreciate where we've been as people and organizations, help me remember why I do the work I do, and help me understand how I can do my work in easier alignment with what is now emerging all around the world.

And now, even as all of this is starting to sink in and flow together for us, the organization of our world seems to be dissolving. We used to call it transition, as if it would all blow over. When it lingered on, we started calling it transformation and prepared ourselves for long-term consulting fees. Now, as we look back at where we've been, we can see that it's been evolution all along -- and we're beginning to see the real possibility of doing it more simply, more quickly and more intentionally.

This is the story of evolution at work -- and the emergence of inviting organization. It's the integration of a dozen or so years of professional study and personal practice in organization -- crunching numbers, building teams, redesigning process, reading, relaxing

and opening space. It's an analytical mapping of the old, deep stories recounted by anthropologist Angeles Arriens and philosopher Ken Wilber and the modern business stories developed by organization development pioneers Fred and Merrelyn Emery, Open Space Technology originator Harrison Owen, and the new economy gurus at Fast Company magazine. Taken together, it invites a satisfying look back, a hopeful look forward and a practical view of our present, as the inviting organization is emerging in open space.

We are surfing the edge of chaos, along crazy waves that curl back on themselves over and over again. Fittingly enough, then, this story of the inviting organization is itself one grand invitation. It's an invitation to explore, experiment, experience and encourage others to join us as it all comes back together -- as we all come back together -- in an open space beyond the learning organization, where inviting leaders and inviting organizations are moving faster and easier than ever. Inviting leaders and inviting organizations, doing what they are and being what they do. They are opening, inviting stories. And the being and the doing are one, and everywhere.

In Search of the Next Great Strategic Question

In 1999, the cover of Fast Company magazine, a leading voice of the so-called 'new economy,' proclaimed "How Digital Is Your Company?" as the next great strategic question. According to their story, business strategy used to be as simple as "What business are you in?" As organizations evolved, "What's your business model?" became the definitive question. Today, it's all about getting digital.

These questions matter, they said, because every time we get an evolutionary click from one question to the next, everything throughout the organization needs to evolve together, to answer it. Specifically, they said that organizations need to rethink the "four basics of business" which they named as (1) attracting talent, (2) segmenting and selling customers, (3) using speed, and (4) financing operations.

Their newest and greatest strategic question, "How digital are you?" demands a rethinking of how we use information and technology to drive the flow of goods and services. In their story, however, they held up examples like McDonald's, Wal-Mart and Intel that were working this digital question 15 years ago. "How old is this story?" is the question that came to my mind -- followed closely by "If this is a 15-year-old strategic question, then what's the NEXT great strategic question? What are the next leading-edge organizations asking now?"

At the time this story came out, I was already deep into the work of mapping my own understanding of evolution in organization, with the overlapping stories of first-peoples anthropologist Angeles Arrien, Open Space Technology originator Harrison Owen, organization developers Fred Emery, Merrelyn Emery and Eric Trist, and philosopher Ken Wilber. If these wise people, and the map I was making from their stories, were to be of any use at all, they had better point me to the next great question.

My map was (and is) a four-quadrant, five-stage diagram of evolution in organization. Fast Company's four basics of business mapped quickly and easily into my four quadrants. Their three strategic questions fit perfectly with my first three stages of evolution. And when I looked into my own fourth stage, the next great strategic question, "How inviting is your organization?" was right there waiting for me, jumping up and down begging to be asked.

Since then, this evolutionary map has been invaluable in orienting myself to what is going on in all kinds of organizations. Along the way, I've shared it in conversation with clients and colleagues. It's been universally understood and appreciated, even by friends with no training in business or practice in organization. While the map may appear either overly simple or overwhelmingly complex at first glance, the story itself has been easily understood by those who've heard it over the phone and other places where the actual map never was drawn.

What follows here is my story of evolution at work. It begins with the story of the map, which pulls together the old stories of spirit and new stories of business and organization. Along the way, the inviting organization will emerge and will be linked to a number of other developments in organization. So it will live in the context of other real stuff, not just in the context of my little map. Finally, we bring Open Space Technology into the picture, noticing its easy alignment and ready support for the emergence of inviting at work.

As I look back, this story gives me a deeper appreciation for where we've been in organization and real satisfaction that nothing's been wasted. Looking ahead, I find a hopeful clarity and confidence that all of this swirling does indeed work out in the end. All of which helps me now, in the present, to rest a little easier, stand a little readier, and invite a little more evolution at work. Please join me...

Evolution in Four Dimensions

This story starts with the work of philosopher Ken Wilber, who was already being hailed as the greatest American philosopher when he was just 23 years old. He earned this acclaim for his first book, Spectrum of Consciousness. It was the first successfully seamless integration of earthy native spirituality, rational western science and transcendent eastern wisdom. It was also the first of a long line of Wilber writings offering various spins on this same seamless theme. I read his Brief History of Everything first and it got me thinking. Two years later I heard him speak and was moved to read his Marriage of Sense and Soul. Halfway through that second book this picture of evolution in organization exploded into my consciousness. I put down the book and started writing.

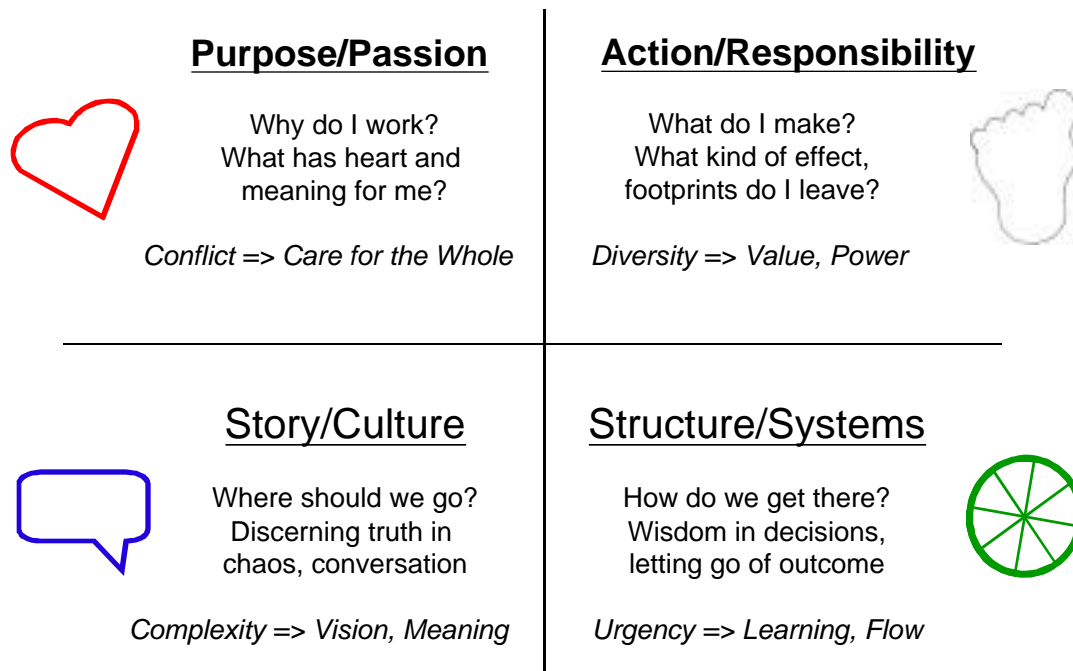
I started with Wilber's basic two-by-two matrix, a four quadrant map, that has at its core two basic tensions or spectrums of consciousness, shown as intersecting, perpendicular

axes. The first axis stretches from inside to outside, subjective to objective. In organizational terms, every organization has a subjective, depends-on-who-you ask, open-to-interpretation and re-interpretation, unmeasurable-but-undeniable, story-based, deeper meaning INSIDE and an objective, observable, measurable, put-it-in-a-powerpoint-pie-chart, pass-it-around-the-room, obviously real OUTSIDE. We use soft, interpersonal skills to deal with the inside stuff of people and culture. We use hard data skills to deal with the outside stuff of decision-making and action.

The second axis is equally clear. It runs from the one to the many, the individual to the collective, the personal to the organizational. Every organization exists simultaneously as a single, whole entity AND has many, many individual parts or people. Leadership skills are about the personal, about passion and responsibility, about what do I want and what am I willing to do about it. Strategy is a bigger, organizational form of the same stuff, about culture and decision-making, about where do we want to go and how are we going to get there.

When Wilber lets the inside and outside play with the one and the many, he generates four quadrants, what he calls the four dimensions of evolution. Translated into organizational terms, we see that our work really is pulling us in four directions at once! Wilber's four dimensions are consciousness, culture, social structure and behavior. Consciousness is the internal, individual dimension, what we all know on the inside, for ourselves. Culture is the collective form of that, the stories that we make to hold us

Dimensions of Organization



Primary References: Owen, Wilber, Arrien

together and tell us what is good and bad, right and wrong, sought and avoided. Social structure is the outside, collective, the outside of structure, it's what we literally construct based on our cultural beliefs. Finally, behavior is the individual, outside dimension, the individual actions taken within the social structures, what each of us actually does about the things that we are conscious of and care about.

Translating this into more organizational terms, consciousness becomes personal passion or intention. Culture and structure need no translating, as long as we remember that culture is all about story and structure is about how we make decisions and move forward. Finally, behavior becomes action, the bottom lines at any standard cocktail party and any organization... what do you DO? and how do you get people to DO what is required at work? So we really are being pulled in four directions at work, continually reconciling and aligning what I love and care about as an individual with the plans and policies of who WE say we are as a culture, with the decisions, choices and options WE have now in the current organizational structure, with what I am willing to take personal responsibility for DOing about all of it. No wonder we come home tired all the time!

If we turn now the wisdom of first-people nations through the ages, as told by Angeles Arrien in her book *The Four-Fold Way*, the advice we get about this is simple and clear: show up, pay attention to what has heart and meaning, speak your truth, and let it go. In her book, *The Fourfold Way*, Arriens links these four simple practices with four hero archetypes, four meditations, and four human resources. All of these map easily into the Wilber dimensions.

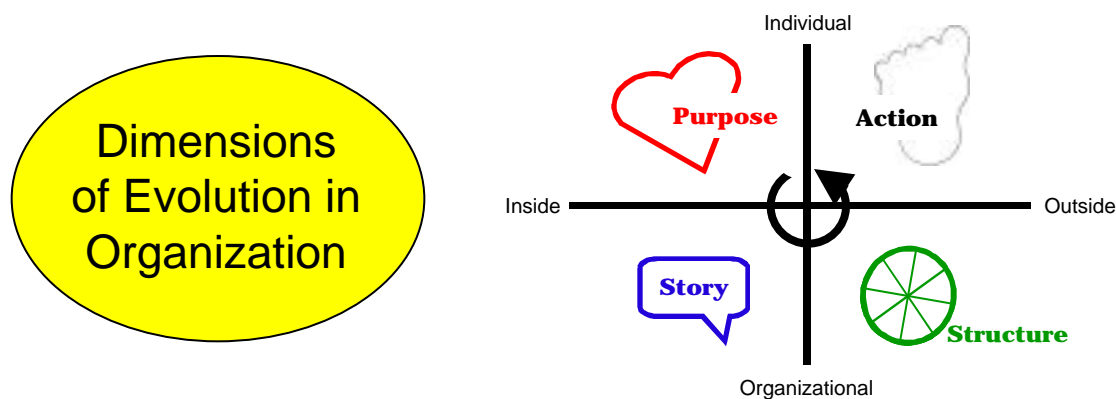
Showing up is the work of the warrior archetype, who practices standing meditation, developing the human resource of power. Map this to individual responsibility and action, where we exercise our individual power to take a stand and be accountable. Paying attention to what has heart and meaning is the work of the healer archetype, whose meditation is lying down and resource is love. Map this to individual purpose and intention, the things we love and in which we rest. Telling the truth is the work of the visionary, who does a sitting meditation and whose resource is vision. Map this to culture, story and planning and vision in organization. And finally, the letting go of the outcome is the work of the teacher, whose meditation is moving, walking and whose resource is wisdom. Map this to our capacity to make decisions and move within and beyond the structure of the organization.

Returning to the recent Fast Company story that prompted this journey, we can now appreciate just how basic their "four basics of business" really are. Attracting talent is about creating organizations that people can put their hearts into, where they can find a reason to work, something they love and can rest into. Segmenting and going after customers is about creating a vision, a story that customers can literally buy into. Using speed as a competitive advantage is about structuring for movement, letting go of control, and allowing more distributed, front-line decision-making. And finally, financing the operation is about generating power or value through responsibility and action.

Evolution in Open Space

So far, we've seen that our oldest stories of spirit are aligned with some of our newest stories of business. Now we come to the practice of Open Space Technology, as discovered and disseminated by Harrison Owen. Given his experience in the Peace Corps with the tribes of West Africa, his study of Ken Wilber, his friendship with Angeles Arrien and his deeply practical approach to business of all kinds, it's not surprising that Harrison's contribution to evolution in organization would directly address each of the dimensions of evolution at work AND the challenge of moving in all of them at once.

When he looked back on the first handful of years of practicing Open Space Technology, Harrison concluded that Open Space works best when four key conditions are present: when the tasks to be done are highly complex, when the people who are needed to do them are personally, professionally, or simply geographically diverse, when there is real or potential conflict, and when the decision time was yesterday.



Business Basics (1)	Attract Talent	Sell Customers	Use Speed	Finance Ops
The Fourfold Way (2)	Pay Attention	Tell the Truth	Let it Go	Show Up
Leadership Roles (2)	Healer	Visionary	Teacher	Warrior
Human Resources (2)	Love	Vision	Wisdom	Power
Dimensions of Evolution (3)	Consciousness	Culture	Social Structure	Behavior
Dimensions of Organization (4)	Purpose/Passion	Story/Culture	Systems/Structure	Action/Acc'tability
Conditions for OST (5)	Conflict (Passion)	Complexity	Urgency	Diversity
Outcomes of OST (5)	Leadership	Vision	Community	Management
Mechanisms of OST (5)	Gathering Circle	Bulletin Board	Marketplace	Breathing
Preparation for OST (4)	Invitation List	Theme/Invitation	Space/Logistics	Documentation

(1) Fast Company (2) Arrien (3) Wilber (4) Herman (5) Owen

Keeping up with our picture then, map the conflict to our first quadrant, as it's just passion in disguise. It just means people care enough to disagree, but not yet enough to hold the larger whole in their hearts. Map high complexity to the absence of vision, as we don't yet see how we all work together, can't yet see the plan. Map the decision-making lag to questions about whether so-and-so is ready to let go of thus-and-such, the structure's not ready to move. And finally, map the diversity as deviance or differences of opinion as block creative new action and new value, remembering that environmentally and financially, diversification is power.

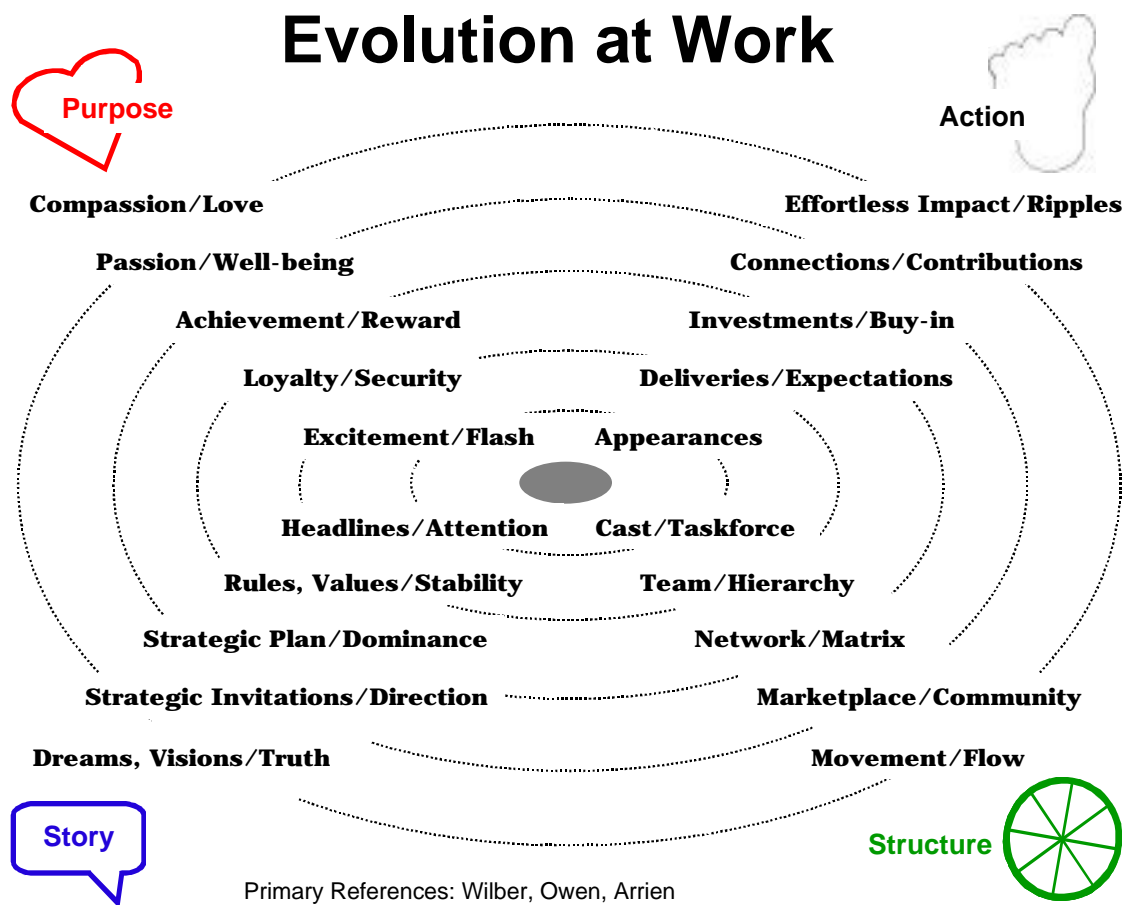
To look at why it works so well when the levels of conflict, complexity, urgency and deviation are high and rising, we have only to look at what it invites people to do. First it invites leaders to invite leadership, from all sides, to sit together as one circle, and to give their attention to this larger whole. Next the big, empty bulletin board wall invites all to speak their truth, write it down, and post it so that others who share the same passions can be found and engaged. Then the open marketplace invites the everyone present to move and move and move again, constantly letting go of groups and ideas, in order to maximize learning (wisdom) and contribution (value). Finally, it is the responsibility of everyone who led a breakout session to document what happened so that the action can continue.

What's more, the preparation for any open space event has four requirements: the invitation, the invitation list, the space/time logistics, and a plan for publishing the proceedings. The invitation list is about attracting the necessary talent. The invitation document is the vision that brings them together. The logistical opening of the space and time for meeting give people a chance to let go of regular routines and speeds the flow of work. Finally, the plan for publishing the proceedings takes responsibility for action afterward. In the end, it seems that the practice of opening space naturally addresses the four dimensional challenge of evolution AND the four basics of business.

To paraphrase Harrison's own story on this, leadership emerges as passion bounded by responsibility, the vision emerges on the wall, the community moves together in the marketplace and the management is a 'no-brainer,' because the whole thing is sprung from leadership and responsibility. He never designed it to do this, indeed Harrison is the first to say that he didn't design it or create it at all... but discovered it, in the process of trying to make the work of managing one particular conference event amazing AND easy.

Evolution in Organization

To summarize our progress here then, we've discovered that evolution, Open Space, and apparently everything else, is four dimensional, four directional, even four seasonal if you let them move in that way. But as we click through those seasons, where do we go and what do we become? I hear the echoes of kids in the backseat... when are we gonna get there? Where is the inviting organization? How much longer 'til we get there? Well, I'll show you the map...



...keeping in mind that no map is RIGHT, but that some maps are helpful, we'll tie up these quadrant stories and show how they evolve together, as we resolve bigger and bigger conflicts, see our way through increasing complexity, move faster and easier in organization, and act more and more responsibly in larger, more diverse circles. What follows is a nutshell review of each quadrant and a new story of evolution through five distinct levels which parallel Wilber's continuum from matter to body to mind to soul to spirit.

Purpose/Passion. It seems right enough to start with what we love, what we think we want, why we work, and what we intend to create for ourselves. This is the inside-individual face of organization. It's about consciousness, about paying attention to what has heart and meaning, about resolving the conflicts that arise between what we have and what we want, about why we get up and go to work everyday, and about what organizations must honor and appreciate in order to attract talent in competitive markets.

Looking into our map now, we see that the evolutionary journey in this quadrant is about learning to work for higher and higher purposes. In the beginning of our own work lives

and the lives of organizations, we work for the excitement of it all. Over time, we might start a family, settle down, and excitement isn't as important as security and stability, to be able to maintain the success we've had at the first level. Once we come to believe that we will not lose the gains we've made, it's easy to shift into a proactive drive for still more reward, and work becomes about reaching the next rung of the ladder. At some point, however, we come to the place of asking ourselves what's really most important to us, what is our deepest passion, what do we really love and how can we do THAT in our work. We give our attention to insight, integrity, the things that pique our curiosity and help us feel healthy and whole. Until finally, we begin to ask how we can do the most service for the most other people, working beyond our own personal passions to a compassion for so many others.

I should note here, too, that our movements through these levels, as individuals, organizations and a whole national consciousness is never as strict and mechanical as moving from first grade to second to third. Rather they are a journey like any other learning or practice scale, like our 10K race times, monthly sales, and the stock market. They are some easy milestones against which to mark the movement of what we can think of as the critical mass of our attention to each of the four dimensions. And how big we care, how much we see, how easily we let go, and how responsibly we act -- just like our 10K race time -- moves from day to day, depending on all sorts of circumstances and conditions. We'll see differences, too, between people in the same departments and departments in the same organization. The critical mass of attention in the sales department is likely very different from that of the corporate philanthropy department or employee assistance program.

Furthermore, if we say that the latter fall higher on the scale, at a higher stage or level, we need also to note that their work is only made possible by the revenues generated by the sales department. None of the higher levels are sustainable without the infrastructure and foundation provided by the lower levels. This is what Wilber means when he says each level transcends, rises above the one before it, AND embraces, includes, and depends on the work done at the level below. The overall drive is to increase, expand, and transcend, bringing more and more of our individual, departmental and organizational attention and energy to higher and higher levels. This movement happens always and everywhere, trending upward without effort or trying. It's enough just to pay attention. Simply noticing these movements and levels can make our work easier, but making one level better than the next always seems to get in the way.

And so, keeping in mind then, that no map IS the territory, that no person, department or organization is all or always focused at one level, in any of the quadrants, and that no one level is better or worse than another, we continue with our story about story...

Story/Culture. Here the challenge is to explain what we see, to clarify where we should go, and develop the stories that help us stay focused and stay together. This is the inside-collective face of organization. It's about culture, about seeing and telling the truth about who we are, about defining simple patterns in times of complexity, and about the work every organization must do to segment and go after the customers it wants to serve. It's

about creating a story that customers (and everyone else) can literally buy into and believe in.

The logic of our central organizational story moves from what I call auto-logic, the obvious, through monologue to dialogue and onto multi-logic and beyond to what I call translogue or translogic. As organization begins, it's central story is about headlines, imaging and spins. It's logos, business cards, press releases and soundbites on the outside and the grapevine on the inside. It's the superficial, the automatic, the obvious and it's all about excitement. At the next level, the focus shifts to stories of stability and loyalty: mission, vision, values statements and monologues by the people in charge. The organizational body emerges, followed by organizational mind: the strategic plan. And with the emergence of the plan, dialogue takes over. The leader can't dictate through monologue, but has to control through ongoing dialogue with each part. The story, the plan, and our reason for working are all told and retold in the universal language of 'the numbers.'

As evolution continues and complexity rises, the parts start talking to each other and the multilogue breaks out. It's everybody talking to everybody, which doesn't happen very often in most organizations. In the chaos of it all, the strategic plan gives way to the strategic invitation, a story that is simple enough to travel fast and light, to appeal to people's passions, the reasons why they really want to work AND is complex enough to embrace and include the most important issues from the grapevine, the mission statement and the strategic plans. Strategic invitation is the story that leads organization into multilogue, where strategic conversation can move faster than the plan. Beyond this, at the highest level, where the reason we work is compassion for all, the story and vision become dream, a 'translogue in which we seem to be in conversation with the whole organization, as organization, at once... or maybe even something larger.

As the challenge with caring is to speak it, the challenge with our talking story is to walk it in our decisions, structures and systems.

Structure/Systems. This is where the vision, reflection and conversation of story and plan emerge as the objective, observable choices and decisions, the stuff that guides real action. This is where we get down to how we're going to get where we've said we want to go, where we develop the structures and systems that support timely and wise decision-making. This is the outside-collective face of organization. It's the sandbox where we build up organization structures and production systems AND where we let them go, tear them down, and open space for what's next. This is where we come up against the dizzying reality that it's ALL moving, where we learn over and over again to go with the bigger, faster flow.

The evolution of organization structure and systems (and restructuring and redesigning) begins simply as a circle of friends, colleagues and associates. It's a cast of characters, some of whom may be bigger stars than others, but none of whom really tells the others what to do. As cast, circle, task force, posse, and business start-up we may take our cues from outside directors, sheriffs or financiers, but inside the organization, it's an all for one

and one for all kind of game that we play for the excitement and headlines. If we have some success together, however, we turn quickly to those bigger names to secure our future. We pledge our loyalty and submit to more and more monologues about policy and procedures, mission and vision. When we appoint a team leader, hierarchy emerges and in time becomes bureaucracy, where responsibility for outcomes rests not with the workers, but with the managers one or more organizational layers above. And this works for a time, until the pressure for front-line decision-making starts to erode lines of command and the bureaucracy starts to dissolve. We restructure into smaller, faster networked boxes, each one full of numbers and assigned to a person, who sits in a matrix of cubes and reports to a handful of different bosses.

Each year or so we reshuffle the boxes, until the whole organization ends up in constant motion, one big organizational to-do list, a veritable marketplace of projects, each its own little cast, circle, posse, task force. The circles are formed by invitation (though some invitations are more open than others), to meet specific business needs, given a budget and/or other resource boundaries, and directed to perform in a way that adds value. This is what we're coming to know as the structure of organization and the way real work gets done. Now look again at the process of Open Space, where the circle is formed by an invitation, based on personal passion, professional interests and business needs, the resources and boundaries are clearly marked and the direction is do whatever you can to maximize your own learning and contribution. Open Space is real work, made faster and easier, in circle and invitation and marketplace.

And finally, if our experience in Open Space is any indication, when the marketplace of ideas and issues and projects REALLY starts to move, what emerges as the highest form of organization is movement, an undeniable sense of spirit and hardly any real structure at all. At this highest level, our compassion or concern is for all (all customers, all employees, all people, take your pick). Our story starts to sound like "I have a dream..." and structurally, in the words of folk singer Arlo Guthrie, "They'll call it a movement!" when the flow of work is nothing but flow. And the thing about flow is it comes and it goes, but it CAN be invited, we know.

Action/Responsibility. In the end, however, organizations don't really move, don't really do any work -- people do. We think and talk and build support for what we care about. And then, each of us DOES something. Takes responsibility and takes action. Makes a difference and makes our own unique contribution to the flow of evolution. This is the outside-individual face of organization. It's about unique, individual behavior, about creating value and using diverse abilities to make things different, about what we have to show for ourselves, and where we stand, when our work is done. This is the question of finance, value and contribution -- the footprints we leave on a bottom line and better world.

The evolution in this quadrant runs from making different stuff, the proverbial better mousetrap, to making a difference that makes a difference, rippling through everything. While it's been associated here with diversity, that's really only half-way there, as it is

really about uniqueness, the reality that each of us is absolutely unique and the possibility that every single action IS a unique, creative act.

This journey begins with making appearances, making points, adding value with bells and whistles, a new look to an old product. It's what makes work exciting, makes headlines. In the beginning, it's about showing up in the right places, but eventually it becomes about showing up at the right time, making deliveries, as promised, time and again, loyal and stable, like it says in the mission statement. Eventually, however, as the business grows, the loyal servants are rewarded. We make them partners, shareholders, give bonuses as rewards, and investments. Everything is done based on expected return, the places we work, the projects we choose, the phone calls we return are all 'calculated' for potential payoff.

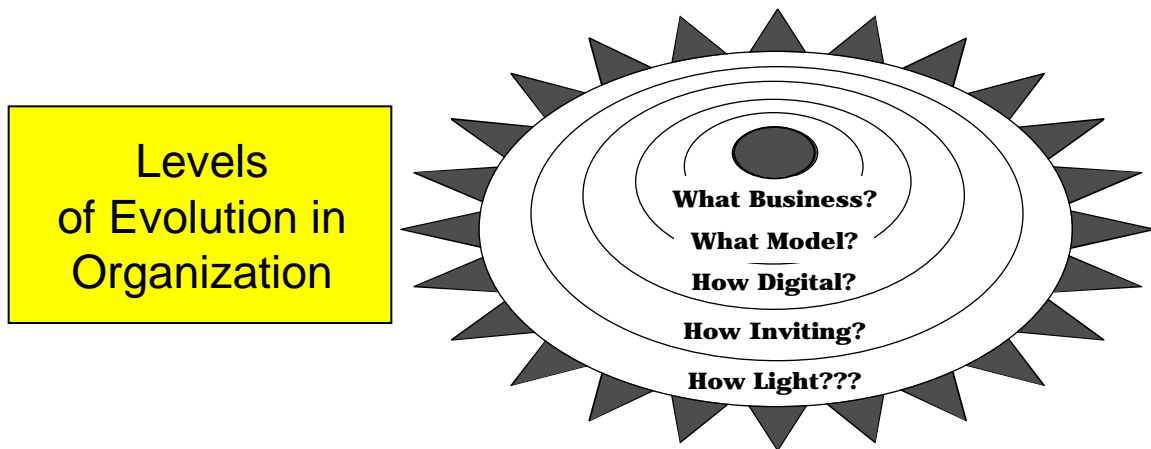
At some point, however, the luster of marginal gain, or the effort of calculation in the face of rising uncertainty, just doesn't matter anymore, and we begin to do what we REALLY want, without regard to returns. We make offerings, contributions and invitations, true gifts of ourselves and our time. We begin to connect our work to those issues, ideas and opportunities and questions that make us feel curious, passionate, healthy, whole. And in those moments when spirit shows up, it all seems to swirl together, everything really works. We make responsible ripples and have an effortless but amazing impact on the people and world around us, often without even knowing it.

The Inviting Organization Emerges

And there you have it, in about twenty nutshells. This is my story of evolution at work, mapped onto the oldest story of human evolution, as integrated and animated by Wilber, from the physics of excitement and matter, through the biology of body, the psychology of mind, the theology of soul, finally arriving at the mysticism of spirit.

Drawing on Wilber, Harrison Owen has developed his own story of the evolution of organization and leaders, based on his own personal experience in organization and Open Space. That story begins with the reactive organization, defined by the reptilian instinct of killing and eating whatever moves. The leader here is the pioneer, the entrepreneur. Next comes the responsive organization, customer-focused, aiming to please, and as reassuring as a good English pub, but don't mess with the bartender. The proactive organization comes next, characterized by an insatiable need to measure and analyze everything, led by the MBA. In Harrison's story, the interactive organization is emerging now, characterized by the energy of a good coffee break and the action of surfing, and leadership that is 'everybody.' This is, of course, just what Open Space looks like. And finally, the highest realm of organizational life, says Owen, is the inspired or inspirited organization. He is quick to add that while he's seen it show up often, he's never seen anyone sustain this highest level of organization, where leadership is invisible, it's nobody, or at least it's nobody we can see.

Coming at this from a more academic direction, Fred and Merrelyn Emery have studied what they describe as four kinds of organizational environments. The first level is 'random,' where the goodies and badies come randomly and can't be predicted. That's



Levels of Evolution	Matter	Body	Mind	Soul	Spirit
Operating Environment (b)	Random, Chaotic	Clustered	Disturbed	Turbulent/Adaptive	Vortical
Journey of Spirit at Work (d)	Reactive	Responsive	Proactive	Interactive	Inspired
Organizational Heroes (d)	Pioneer	Captain/Pilot	MBA	Everybody	Nobody
The Seattle Stories	Weyerhaeuser	Boeing	Microsoft	Starbucks	Chief Seattle
THE Strategic Question (a)	What Business?	What Model?	How Digital?	How Inviting?	How Light???
Individual Purpose/Passion	Excitement	Security	Achievement	Passion/Well-Being	Compassion
Organizational Story/Culture	News	Rules, Values	Plans	Invitation	Dream
Organizational Structure	Cast/Task Force	Team/Hierarchy	Network/Matrix	Marketplace	Movement
Individual Action/Making	Appearances	Deliveries	Investments	Contributions	Ripples

(a) Fast Company (b) Emery (c) Herman (d) Owen

why we have to be reptilean and reactive, per Owen, at this level. Next comes 'clustered,' where patterns emerge and learning and planning become possible. Then, they say, one group is eating into a pile of goodies and discovers another group eating into it from the other side. They call this environment 'competitive' and 'disturbed,' because the competition continually disturbs our well-laid plans. Next comes the 'turbulent/adaptive' stage, a state where the disturbances have resolved into permanent whitewater and continuous adaptation becomes essential for survival. Finally, they hypothesize that there is actually a fifth level. They could sense it, but could never study it formally because, like Owen's inspired level, it can't be sustained long enough to document. They call this level vortical, as in vortex, which fits perfectly with our experience in Open Space and elsewhere. When spirit runs high in a workgroup, as it does so often in Open Space meetings, participants often report having planned to or even tried to leave, "but something kept sucking me back in." The energetic pull of inspiring work seems consistent with the physical sucking of the vortical (swirling, whirlpool) environment in the Emery story. While it's important to note that their research and analysis did identify distinct ideals, strategies, planning scopes and operating skills required to survive in each of the first four environments, we'll save those details for another day.

A more playful extension of this story, however, and one that might help this map sink a bit deeper in memory, is something I call the Seattle Stories. This is really a simple, five-stage history of the Seattle region, which has participated in every major wave of American economic development. The first wave was timber, led by Weyerhaeuser, an exciting, pioneering sort of business, gathering the raw materials (matter) that were the building blocks of the rest of business life. Next, came Boeing, literally in the business of manufacturing stable, secure bodies that make deliveries and are operating by chiefs who make monologues over loud speakers like CEOs on the company-wide conference call. In the information age there is Microsoft, a company that may have invented stock option incentive plans, has networked us all, and made us all a little out of our minds. Next comes free-agent nation, where the leadership is everywhere and the headquarters is Starbucks. Like the very first open space meeting, it's all about the energy of a good coffee break, simple, powerful, working, learning, relaxing -- and exceedingly profitable. And finally, there is Chief Seattle, the invisible, spiritual leader of the environmental movement, to whom all kinds of wise sayings are attributed.

Finally, if you step back for a moment, to the Evolution at Work table of contents, you see that the five sections of my own story flow through these same five levels. Opening Invitation (in organization) is about what had me so excited in the first place, about my own pioneering and discovering in open space. Inviting Evolution defined the body of this work, with mission, vision and values that include poetry and science, beginnings and endings, the personal and universal. Evolving Organization is the section we're in now, rational, logical, analytical, the strategic justification and business case for the inviting organization. Next, Organizing in Open Space introduces the soul of this work, where it all comes together, in practice, as inviting -- something we can do AND be, as individuals and organizations. The pieces there are built to travel as handouts, as the leaders of the practice become 'everybody.' Finally, the Opening Invitation (as organization) comes back to where we started, but knows the place for the first time. It's a last wisp of the spirit of (this) invitation to discover the inviting organization.

And so we return to the Fast Company story that gave rise to this whole adventure. As a strategic question, "What business are you in?" certainly rests on the obvious, the essential, the matter of work. "What's your business model?" demands more of a body: set the boundaries, integrate the parts, make the case for what's in and what's out. "How digital are you?" is all about information, data, mind, and running the business by the numbers, which is where most of our organizations are now. But I wanted to know what the new leaders were doing now, not fifteen years ago. What is the NEXT great strategic question? Everything I've seen says it must be "How open and inviting is your organization?"

The Inviting Organization in Open Space

The inviting organization emerges from everything and everywhere we've already been, and indeed still are. The emergence of passion, curiosity, health and well-being at work come not at the expense of excitement, security and achievement. They come as the

fruits of it. The excitement comes not from the outside, but from the rush of bringing our own personal art to the outside, at work. The security comes not from knowing this job or organization will last, but from knowing who we are and that we have options beyond this one. And while we still get things done, we do them better than ever because they are the things we see as most important to do.

Similarly, the emergence of strategic invitation and strategic conversation does not come at the expense of the strategic plan, but comes on top of it, animating and detailing it like never before. Every invitation, from the largest, company-wide strategic planning conference to the simplest "Joe and Susie are moving to California, come help us pack them up and send them off" gathering of friends is built on the same information: (1) the news, headlines or theme, (2) the mission, vision, values, and (3) the expectations and plans. In the case of Joe and Susie, the news is that they're moving. The values are love, friendship, community. The plan is for everyone to bring boxes and tape and for Joe and Susie to keep the pizza and beer coming until their stuff is all packed.

The strategic corporate invitation does the same: some news that needs attention, the boundaries, budget, and other known constraints, and the logistical details for where and when the working session will be convened. The invitation includes all the levels of story below it, and transcends them as something smaller, faster, clearer, stronger. They look like soundbites, but move at the speed of the grapevine, with the simplicity of a to-do list and the power of the entire strategic plan. And as we move beyond the soundbites, the mission statements and the plans, posting their essences in strategic invitation and hosting our most important work in strategic conversations, we transcend command-and-control, as well.

Command relies on the bartender, pilot, captain or other executive who can be heard over all the others. Control relies on measurement and constant observation. As we move beyond command-and-control into a world of post-and-host, we don't discard these things, we expand them. Over time, the initial cast grows into team, becomes bureaucracy, dissolves into network. When it finally blooms into marketplace, it allows EVERYONE to be heard over the turbulence of the work and demands that EVERYONE be paying attention to maximizing their own learning and contribution. In our most highly evolved organizations, ANYONE can post an invitation and host a working conversation to address business issues AS THEY ARISE and everyone can see all of the invitations, the entire work of their organization.

Finally, as our work evolves, we don't stop making appearances and discovering new and different things, we don't stop making deliveries and making good on commitments, and don't stop expecting a return on investment. But the nature of these things changes and merges. Most notably, as our circles expand and bloom into marketplace, we notice that we benefit from all kinds of unexpected contributions by others. As this happens, we contribute more easily and actively because we don't expect our returns to come as quickly or directly. Our commitments become pledges to stay together, stay present, until the work is done, as long as it takes. And finally, the appearances we begin to invite

and be excited by are no longer about our moments to shine, but those moments when spirit appears and shines through others.

The inviting organization emerges and re-emerges out of personal passion and artistry, strategic invitation and conversation, an open community marketplace, and the responsible pursuit of learning and contribution. It is truly extraordinary, and not where most of us live and work everyday. But it does happen -- and happen with regularity. It has appeared in most of the Open Space meetings and events I've facilitated. And when the work of those gatherings closes, the waves of thank yous, amazings and extraordinaries have been heard, I always remind the group that while the inviting organization that emerges in open space IS extraordinary, it need not be rare. Indeed, the passion and responsibility, clarity and quickness that is the inviting organization can be invited easily and often, in Open Space and otherwise, by the intentional practice of invitation at work.

Inviting Conclusions

This, then, is my own short story on Open Space Technology: It is the skillful and ongoing practice of invitation in organization. I say this not only because an open space event begins when the leader(s) of the organization issue a strategic invitation and open a strategic conversation, but also because of what can happen next, and next, and next... rippling through everything.

When the leader(s) of any organization notice (and dare to say) that the most important questions facing the organization are more complex, diverse and urgent than the current systems and structures can handle, that there is some conflict between what we have and what we want, Open Space Technology allows them to invite and engage anyone and everyone who has any concern or responsibility for resolving these questions. When that first invitation goes out, it naturally attracts all of those with real passion for the issues identified. This IS what any good invitation does: it raises issues, stirs passions, and links them to responsibility for showing up to work.

When the people gather on the day of the event, the facilitator walks into the open space in the center of the group (circle) and invites them again. This time the invitation is to identify the issues that they are most passionate about and for which they are willing to take some responsibility. Then any number of people jump out of their seats, grab markers and paper, and the next invitations go out. This time, however, the invitations come from all over the organization, from any of the participants in the room. These folks are inviting the rest of the group to their targeted breakout session to deal with the issue(s) that they see as most important.

When the conveners (hosts, if you will) of the breakout sessions capture the notes, ideas and next steps identified in their sessions, they can be distributed in a book or website with the same from all of the other sessions. These collected notes invite all participants, and anyone else with whom these notes and next steps are shared, to follow-through on

the actions identified. Often, some of those next steps include convening other meetings in open space. In this way, the practice of invitation comes full-circle, and sets itself up as an ongoing practice in organization. When new leaders emerge in open space, new invitations spring forth, and new results tend to follow -- people and organizations growing together, by invitation.

In day-to-day organizational life, this identification of issues, assigning of responsibility, scheduling of meetings, discussion of options, and documentation of next steps all qualifies as "real work." In Open Space, however, so much of this real work happens so quickly and easily, that we often fail to notice how much real work is actually getting done. Indeed we often slip into measuring "real action" and "real work" in terms of pain and suffering rather than promise and progress. And, as ever, we'll get what we ask for.

We could theorize that this new, inviting organization goes beyond command-and-control, to a place and practice of post-and-host -- the posting of working invitations and hosting of working conversations. We could reason further that while there is much to achieve in organization, nobody wants to BE an achievement. And while people want to BE inspired, as soon as we put "inspire the troops" on our to-do list, we flatten spirit into just another doing. Invitation begins to resolve all of this -- because inviting is something we can DO as an ongoing practice and can aspire to BE as leaders and organizations.

In practice, however, we quickly discover that things tend to get done faster and easier by invitation. In short, working by invitation really works.

And looking back, we see that nothing has been wasted. We've called it management flavor-of-the-month. Well, pick your favorite flavor and you're sure to find it on the map of our evolution, sure to find it contributing to the infrastructure that supports the emergence of open invitation at work. We've seen the emergence of "people goals" and "culture objectives" that give attention to the softer side of organization. Flexible schedules, open-book management, large-group meetings of all kinds have created new options, movement and markets within organization. We've seen all kinds of experiential team-building work, supporting both the rise and the fall of traditional leadership in organization. In our systems, we've seen technology explode into e-commerce marketplaces and knowledge management systems let everyone talk to everyone, even across time through the use of archiving functions. In the area of diversity, we have evolved from boundaries and glass ceilings as a focus, to quotas (diversity by the numbers), and now to various kinds of diversity training that helps organizations find valuable diversification rather than dangerous deviance in difference. The inviting organization rests upon and fully embraces all of our work to date, every flavor-of-the-month has been distance made good.

Looking forward, with this clearer picture in hand, we can see how our journey can be that much more carefully directed and quickly actualized. We can see now how evolution calls us to balance our work in the four dimensions. Over-emphasizing finance or speed at the expense of clear cultural story and passionate, personal artistry can only

throw our wheel out of balance. We can see ourselves rise and fall between the levels of evolution, not a steady, mechanical climb but a series of peak moments that we keep working and practicing to make ordinary, everyday, routine. We can see that what happens in Open Space meetings and events are such peak moments and that the practice of invitation -- doing AND being inviting -- makes more of them. And finally, we can see that in supporting this seeing, this story itself invites you to create it and reaches for the vision, the dream, that lies beyond.

As I shared this picture with Harrison Owen one evening, it occurred to me that in the physicists' story, matter arises out of nothingness, the void. And in the mystic's story, spirit returns us into it. When I added that blackness in the center AND at the edges, it immediately followed that I should fold the four blackened corners into the blackened center, so the whole thing becomes a sort of doughnut. In this way, our seasonal evolution through the four quadrants becomes a spinning around the empty hole of that doughnut. And our evolution through the levels becomes a turning of that doughnut through the hole of that doughnut. This realization gave me pause, a quiet little moment of personal "oh, wow!" Then into that silence, Harrison told me for years he'd had recurring dreams of such a doughnut, mysteriously spinning in space, around and through it's own hole...and that some years later a physicist friend of his explained that physicists call the doughnut a "torus" and know it as the shape of every energy field in Universe.

So we just might be onto something that's quite a bit bigger than we expected. I find it reassuring to rest inside of a story that goes so far and can still inform my day-to-day work in organization. In a recent Open Space conference on management renewal, inside of a giant pharmaceutical corporation, a number of managers noticed that once the event got underway, I didn't seem to do very much at all. The usual comment as they approached was something like, "Boy, I wish I had YOUR job." And my usual response was to notice aloud that when we get our most important issues and projects posted on the wall, with a space and time for each one, the people get moving, the work gets done and management gets a whole lot easier.

These kinds of Open Space events are inviting this kind of simple, powerful, productive ease -- in more and more major corporations, schools, churches and community organizations around the world. I find it incredibly hopeful that so many of these stories are emerging in Open Space and in the world. More and more, it seems that as we get better at bringing people together at work, it gets easier to get the job done. It gets easier to breathe, easier to sleep, easier to let go... and easier to do the most amazing things, at work.

Opening Invitation AS Organization

If we look around our world and our organizations, we see bits and pieces of this grand story everywhere. For me, it's comforting to know that there is some deep order underlying all of this day-to-day, project-to-project chaos. Now, if all of this mapping leaves you a bit blurry, give your head a good shake and get back out into the territory --

your "real" world -- but rest assured that your territory is all evolving in a big Open Space! And note that Open Space Technology is not only a nice "unstructured" way to "get things started." It's actually a highly evolved way of being in organization and getting things done. Which means that our work is to new structures that support it's ongoing practice, rather than simply piling more old hierarchical structures on top of it. In short, our job is to grow more of what's already working.

For example, when Harrison Owen convened his first symposium on Organization Transformation, the participants all told him the best part of it all was the coffee breaks. So the next time around, he *intentionally invited his participants* to nothing more than one big coffee break -- and Open Space Technology was born. Intentional evolution, too, is all about seeing what's best in what we're already doing and working toward, naming it in a simple invitation, and opening the space for our colleagues, customers, suppliers, neighbors and friends, to work together, to create more and more of it.

This is how I've come to understand and pursue what's best in organization: passion, vision, movement, effectiveness. This is the best I can do for now and I'm happy with how it's taken shape. At the same time, however, I know that this story -- and every other invitation, plan and map -- is flat.

In every moment here, I choose but one word, where in fact, it would take many to tell the whole truth. I've tried to *not write* this story for more than a year, but I find that it won't go away, won't leave me in peace. Even so, every time I sit to write, I come face-to-face with the unfathomable odds against my getting it right -- getting it squeezed into the words that will allow *you* to understand what I'm understanding, in a way that *you* can use it in *your* life.

Fact is, there are plenty of days when I can't even explain it to *myself* in the words *I* need, to know just what to do, at just the moment that *I* need to do it. Sometimes it happens anyway. I'd like to think it's a result of all the 'practicing' I do, in my mind, in those moments *right after* I should or could have done something very right. Perhaps the catch is that the moment of doing doesn't really need to be separate from the moment of seeing? But to not pull them apart is an awesome challenge, and who knows what might happen if my trust, my patience, my wisdom and compassion actually succeeded in leaving them together!

So, this is a story that I could not *not write* -- a call I could not refuse -- and yet, one that I know is seeking a level of clarity and certainty that this written world just doesn't allow us humans; seeking a power that can only come when I sit with you and really listen to your story -- as you help me know it and then I tell you mine -- the two of us working together to find the words that lead us to us.

And when it really works, writing this story of ours feels like a slow version of stepping up onto the top of a mountain, breathing the light of a sunrise, or inviting the smile of a little kid -- and saying "wow!" to nobody but myself -- before I can even really think it. It's a time of not doing anything and unavoidably doing something. It's about being

powerfully connected to the whole and hopelessly alone in the details of my own understanding of it all; being driven to write even as I see what we really need is conversation you and me, us and them, more and more... about the things we care about most, are afraid we won't get or can't have, and yet must pursue.

And all shall be well, as we post invitations and host conversations, marrying the personal and the strategic. It really does work! NOT because of our planning and efforting -- but because the world really is waiting for us, really is calling for us, to invite it into these conversations. The world is ever ready to create more of what works, more of what is best for all of us.

And when we answer this call for simplicity, (costing not less than everything), we become inviting leaders inviting leadership. Evolution is now and open space. And the invitation and the organization are one. *Please join us...*

The Practice of Open Space

- complexity
- diversity
- passion (conflict)
- urgency

- invitation
- invitation list
- logistics
- follow-up

- bulletin board
- circle
- marketplace
- breathing

Talking About Opening Space

Before you set up the chairs and bulletin board, before you send out the invitation, you'll probably have to *explain* Open Space to somebody. This isn't always easy. There are a lot of things it IS NOT, but helping other people see what it IS can be quite a challenge.

Mostly, I think, this is because it just doesn't matter. Open Space works, period. If, that is, your purpose is important and your people are willing to take some responsibility for addressing it. So the best way to talk about Open Space is to not talk about it. Talk about the purpose. Talk about the people, the resources and the deadlines. The meeting places, the dates, the time available. Talk about the results you want to achieve. Even if you really just want to try out the process itself, find a really juicy purpose or question first.

That said, many practitioners tell me that they are using the Executive Summary and Guided Tour pieces together as their only Open Space handouts to prospective clients or sponsors. The Executive Summary piece is, in fact, being used in a dozen or more different languages now.

In addition to these, the following list of story seeds is what I sometimes use to guide the conversation about Open Space as a method, which is different from (and quite secondary to) the conversation about the results that want/need to happen inside of the organization. Sometimes I've handed clients this list and we talk through them. Other times I sneak them into the results and event-planning conversations.

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

Each bullet point refers to a different story or set of stories about how Open Space works. Most of these stories are told somewhere in these practice notes or elsewhere in the site and most of the bullet points could be replaced with your own favorite stories from Open Space.

The second story is the story of where Open Space Tech came from, as told earlier in Harrison's article. The third story is of my own introduction to Open Space, as told in the Introduction of Inviting Organization. And, yes, "Can Catholics do this?" is a question that was actually asked in the planning of my first Open Space event.

In fact, this question comes up in lots of settings, about lots of different 'kinds' of people. It sounds like: "Yeah, okay, now I/we (the leader/planners) really do get it, but can our engineers, sales people, kids, nurses, drivers, staff, participants, etc. do this?" And the answer is always, YES! Open Space runs on some really basic human mechanisms: circle, bulletin board, marketplace, and the ups and downs, ins and outs, back and forth or breathing and conversation.

Beyond these story seeds, I've used the bullet-pointed material that follows here as handouts and notes for talking with clients. Perhaps most important in this set of materials are the bits about when NOT to use Open Space. Taken together, the bullet-pointed lists below do a pretty good job of setting the context for opening space, without getting into the technicalities of facilitation.

For technical issues and resources, including invitation language, preparation checklists, sample opening script and templates for producing event proceedings, see the rest of this section.

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

You know, in the spirit of Open Space being a practice in finding one more thing NOT to do, the obvious starting place would be NOT using any of this handout material at all. If your issue doesn't matter, all these handouts won't prove anything. And if your issue really does matter, and your passion for it is real and strong, all this other stuff won't matter anyway.

And so, enough! Good luck, know it works... and don't forget to breathe. <grin>

What Open Space Does

Invites collective awareness and organizes individual action to:

- Resolve important or difficult issues and get the workflow back on track;
- Rally people and resources around new opportunities, or into new situations;
- Move strategic projects forward with broad, cross-functional wisdom and support;
- Re-energize everyone's contribution to achieving strategic objectives and realizing most desirable futures; and
- Channel the power of existing, organic systems into fast, effective results.

Sees work clearly and gets it done quickly with the simple, organic power of self-organization and self-direction. Open Space meetings and conferences can be as short as 3-4 hours, or as long as 2-3 days, with groups of 5 to 500 (or more). They can be organized in a matter of just days or weeks, depending on their size and scope. They are, however, always rooted in four basic goals and intentions, all aimed at best work:

- Personal Insight - identify, share and leverage the abundance of everything we already know and care about doing best work
- Open Invitation - involve all (and only) those people who care enough to take responsibility for doing best work
- Interactive Forum - get out and go beyond everyday routines and traditional structures that often get in the way of real flow and best work
- Integrated Practice - help everyone do more work with less effort by linking individual ideas and actions to larger pieces of best work.

Deals directly and easily with the reality of rapid, swirling change... when the way it's always been really runs out of gas. An evolutionary perspective and a little Open Space help leaders (at any level) deal openly and directly with four challenging realities:

- High Complexity - when no one person or group has the whole story or the perfect solution;
- High Passion, Concern, or even Conflict - when the issue or opportunity is of real importance to people, when it really counts;
- High Diversity - when a variety of different stakeholders, skills, styles or opinions must contribute to one collective best effort; and
- Deadlines Looming - when the time to make wise decisions and take effective action is NOW, if not sooner.

Where and Why to Open Space

Open Space IS APPROPRIATE for:

- Planning and completing special projects, with or without formally organizing a special project team;
- Resolving cross-functional questions, with or without formally organizing a cross-functional team or task force;
- Design and development projects, related to new products, services, processes, customers, standards, or other strategic change or improvement projects;
- Exploring and addressing a range of cultural issues, including diversity, learning, support, orientation, quality, and the like;
- Rapid response to business surprises, whether to seize an opportunity or pick up the pieces and get back on track;
- Creating strategic plans that everybody understands and cares about accomplishing and...
- Staying on track with strategic check-ins that ensure that the details of the plan are still appropriate and still moving toward successful execution.

Open Space yields IMMEDIATE BENEFITS, including:

- Experiential, Breakthrough Learning
- Appropriate Structure and Control
- Open Communication and a Genuine Sense of Community
- High Play, High Creativity, High Efficiency, High Productivity
- Shared Leadership and Personal Responsibility
- Inspired Performance and Growth from Within
- Elimination of barriers to quickness, excellence and pride

Open Space IS NOT MAGIC, benefits can evaporate when:

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

An Open Space Workplan

BEFORE an Open Space Meeting or Conference:

- Open conversation and one-on-one interviews to explore the issues, opportunities, intentions, appropriateness, scope, and timing;
- Set parameters that determine just how open this should or could get; challenge leadership to provide as many 'degrees of freedom' as possible, including who needs to be invited for best possible results;
- Make logistical decisions, including drafting and distribution of the invitation, choice of space, information processing plans, and other practical matters;
- Clarify expectations around questions of control, success, measurement, evaluation, surprise, and support for follow-up, (which might include holding a small 'dry-run' meeting, for key personnel, before a larger conference).

DURING...

- Finalize preparations of meeting space (and establish communication with on-site hospitality staff for conferences);
- Facilitate the opening of the space, initiating the processes for self-organization and best work;
- Guide and support data-processing activities (and hospitality activities during conferences);
- Maintain conditions for best work; every participant's right to determine what constitutes their own best learning, best contribution, best work.

AFTER...

- Debrief conversation, revisiting questions of control, success, measurement, evaluation, surprise and support for follow-up;
- Complete processing of information into proceedings document, including formatting document for electronic distribution/access;
- Establish interactive systems, including methods for electronic communication, that will support follow-up learning and action; and
- Support emergence of new issues, invitations, interactions and opportunities for contribution.

Open Space Outcomes

Certain Productivity

Opening Space may be the fastest way to get an impossible amount of work done with any size of group, especially with issues that are larger, more complex, more diverse or more conflicted than your usual meeting. An Open Space meeting or event can happen, literally, as fast as the sponsors can find a meeting space and the invitees can clear their schedules.

And while we never know exactly what solutions will emerge when we ask a group to go to work on a really tough issue, we can be sure that with just a few days in Open Space, any organization or group can:

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

Appropriate Structure

Open Space is a simple, dynamic, integrative and expanding environment, that allows planning, learning and implementation to occur simultaneously, in a unique and powerful (self-organizing) combination of:

- Support Group - where resources are shared, creativity nurtured, hunches confirmed, decision-making supported, learning and risk-taking encouraged, peers consulted, progress and accountability maintained, and successes celebrated;
- Think Tank - where events are reviewed, patterns and relationships identified, experiences analyzed, theories critiqued, observations shared, futures envisioned, scenarios sharpened;
- Learning Laboratory - where assumptions are tested, issues explored, experiments attempted, products design, plans drafted, possibilities discovered, and new ways to work invented and practiced;
- Practice Workshop - where actions are taken, phone calls made, blueprints finished, invitations issued, momentum experienced, contributions made, services delivered, products developed, and responsible, intentional, self-organization are practiced actively and productively.

Growing the Bottom Line

Open Space is, far and away, the most cost-effective way of getting people, information, and spirit moving in an organization, alliance or coalition. The actual costs of holding a meeting or conference in Open Space are low relative to other large-group methods and a mere drop in the bucket when held up against the very real costs of delayed projects and disheartened people.

Remembering that the Open Space approach can be used with groups of 5 to 500 (or more) people, one rule of thumb for estimating consulting/facilitation costs is it that takes 3-4 days of preparation, meeting and follow-up time for every day (or partial day) of the meeting or conference itself. According to this rule, estimate half-day meetings at 4 days total and 2 1/2 day conferences at 8-12 days total, on the part of the consultant/facilitator.

More importantly, Open Space really hits the bottom-line in terms of lowered costs and increased revenue because it gets so much work done so quickly. When a project that is expected to take 10 months comes in 6 or 8 months early, the reductions in direct costs alone are tremendous. On the revenue side, one company created a whole new product line in two days and made \$24 million in its first year of sales. Suffice it to say that bottom-line gains are all about being prepared to be surprised!

Giving Shape to Open Space

There is no better preparation for leading, sponsoring, hosting and/or otherwise supporting the practice of Open Space Technology than reading Harrison Owen's Open Space Technology: A User's Guide. See "books" at www.globalchicago.net/ost for where to purchase or download a copy. Everything that follows here was developed as extension and expansion of what's in the User's Guide.

That said there are four main areas of preparation for a meeting in Open Space: invitation, invitation list, logistics and documentation, or as shown below.

forms of opening => invitation/purpose: these answers to questions like these eventually form the basis of the invitation... which doesn't try to say something new, but to say what is true about the common answers to these questions.

OS starts when you pick up the phone (and first few lines sound like...)
 we're this kind of org...
 we've always done things this way...
 we're up against these issues now...
 we need to create this kind of results...
 we thought open space was appropriate because...

bainbridge interview questions
 what's most important issue(s)?
 who's doing the best work? ...or who's need for best resolution?
 what else is going on in the world that will matter?

hho interview questions
 what is this place and what should it be?
 who are you and how did you get here?

questions based on four quadrants (seasons) view
 1 - where is the passion? what is core? what really matters here? why bother?
 2 - what's the plan? what's the buzz? what's the dream? who are the poets?
 3 - what's the deadline? what's the catch? what's available? what's ready?
 4 - what's at stake? what's required? what's possible? what makes peace?

ed oakley, enlightened leadership questions
 what's working?
 what makes it work?
 what needs to work next?
 who would benefit? (start with largest group and work back to 'me')
 who will do what, by when (leave this question for the open space meeting)

appreciative inquiry, world café, etc.

forms of focus (givens, guides, non-negotiables) => invitation list/vision: the invitation list represents a whole bunch of other stories and assumptions about what should or could happen in the meeting. best to talk about as many of these as possible in clear, careful and direct ways, before the list is finalized.

- timing/deadlines
- future support/lifespan of project
- funding and other resources available
- decision-making authority
- deliverables required/allowed
- people invited/informed
- existing plans, budgets, structures

forms of os meetings => spacetime logistics/structure: open space comes in all shapes and sizes. the most important is to stay true to the spirit of open space (see page 5).

- 2.5, 1.5, 1.0, 0.5 days events
- three consecutive 4-hour evenings
- series of 2-3-hour meetings
- non-readers, non-writers... from j.engle in haiti
- hybrid conferences... agile software
- ongoing open space... kentucky rules, wesley urban min givens
- practice workshop
- classroom... judi richardson, business law
- evening plus one full day

forms of documentation => footprints/action: if you want action to happen, then you'll have to support it. that usually means capturing the notes and action plans from the breakout sessions and might include setting up online facilities for ongoing reference, tracking and invitation. how will people know you got REAL results?

- individual notes
- flipcharts
- template passed out to conveners
- xerox handwritten notes
- computer typed notes
- voting with computer, dots or clustering
- email, elist, eboard, wiki web
- paint, dance, sing, skits
- photo, video, audio
- gallery wall of posters
- closing circle commitments
- action plans, immediate next steps

The Role of the Facilitator in Open Space

- Support planning meetings and other preparatory conversations to address whole range of pre-event issues:
 - Strategic issue(s) or purpose for the meeting/event
 - Identification of the non-negotiable "givens" within which participants will be invited to work
 - Drafting of the invitation document and method of distribution
 - Development of the invitation list and process of registration
 - Determination of event location and timing
 - Answer emergent questions about design, process, outcomes, logistics
 - Clarify assumptions and expectations about what we know and do not know about what will happen during our time together in open space
 - Coach sponsors of event on how to answer questions from invited participants
- Review the invitation, once it has been produced as a draft by the sponsoring organization(s) and/or planning committee. Write an "agenda" for the event, if required.
- Visit the space proposed for the OS, meet site staff, and confirm availability of essential needs, tape-able wall space, open space for circle, breakout spaces.
- Supply a detailed list of required materials and equipment and supporting their acquisition as necessary.
- Set-up the facility before the event, including conversation with hotel/site staff to help them understand and work most easily with the open space environment.
- Prepare a single sponsor/leader to open the space, introduction and 3-minute story of how we got to this moment of opening.
- Facilitate the event, including opening agenda-making session, morning and evening news sessions, voting and prioritization of issues, next steps planning, and closing circle. This is usually the most visible and least time-consuming part of the facilitator's work.
- Coordinate the production of a proceedings document for all participants
 - Create proceedings document with cover, invitation, ballot, notes, participant list
 - Coordinate gathering and compilation of notes from workings sessions
 - Deliver finished document for overnight copying, pickup and distribute copies
 - Add "next steps" action-planning session notes to main document
 - Enable ongoing open space via website, email list and/or .PDF documents
- Debrief with planners/leaders at the end of each day, as needed.
- Facilitate a 3- to 4-hour follow-up meeting, 6 to 8 weeks later, with leaders, conveners and/or others, to see what has happened with "next steps" and determine what, if any additional steps should be undertaken.

Inviting Language for Invitations and Openings

The following, adapted by Michael Herman from a piece by Harrison Owen, offers some possible language for the written invitation and the opening remarks by the chief leader or sponsor. Nothing magic about this language, but it does cover many of the right bases. The trick is to cover the same bases in language that fits the person speaking and the people gathered. This is usually accomplished by the chief leader simply telling the story of "how we got here and where we hope to go now." Then the facilitator is introduced and steps forward to open the space. That said, the following may be a helpful starting point and a reminder that simple is usually best.

Possible Themes: The Future of _____
 Issues and Opportunities for _____
 How Can We _____

Possible Language:

Please join us for... Our purpose is simple and important...

We need your deep engagement in the issues and opportunities surrounding the present and future of... toward the resolution of current issues and realization of untapped potential...

We have done well and we must do better... to serve ourselves, our organization(s), and our communities...

The work of this session will contribute/lead toward...

Because you care about... you have the skills, experiences and insights that are essential to make it better.

Differences of opinion do exist, but it is out of this rich diversity that powerful new futures can be formed now.

...hope that each of you will put it all on the table... no sacred cows... no undiscussables... the only caveats and boundaries are...

...hope to mix past experience, present realities and all our hopes and dreams for the future into new...

Where there is agreement, we can move forward. Where there is difference we can seek understanding, common ground, and workable compromise.

None of this can happen without open, honest conversation and caring from each and every one of us.

...promises to you... 1) Before we leave every issue of concern to anybody will be on the table, if they choose to put it there. 2) All issues will receive as full a discussion as you choose to give them. 3) You will receive a written record of the discussions and recommendations before you leave. 4) All issues will be ranked in the priority order determined by this group. 5) And finally, that we will identify working groups and immediate next steps for all of the large group's most important issues and any other issue that you want to pursue. That's a promise. ...if you walk out of here muttering to yourself that we never talked about the really important issues that you cared about, please notice that the person responsible for that is you.

It's time to get to work... what are the issues and opportunities for... that you care about? ...what are your ideas, questions, recommendations, concerns, needs and desires for resolution and future directions... right down to the the level of implementation?

Please join us! ...let's go! ...and good luck!

Checklist for On-Site Preparations

These lists have been developed through the preparation and facilitation of numerous open space events. These are the things that I'm giving primary attention to in the days and hours leading up to the opening of a meeting or event.

Purpose and People

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

Meeting Site

- large room - no tables or other obstructions, clean wall
- breakout spaces - 7 per 100, never less than four corners
- chairs in circle
- microphones (2), confirm dead areas of room
- food plan - buffet
- computer plan - room/tables, incl. printer, 5 per 100 people
- flipcharts and easels, one per room
- copier plans

Supplies

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

Set-up

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

Follow-up Plan

- leaders expectations, support
- intranet? other distribution channels?
- conveners reconvened?
- training workshop?
- see notes on non-convergence (in this manual)

Information Processing (if using computers for proceedings)

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

A Sample Script for Opening the Space

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

Welcome/Introduction

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

State the theme

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

A Little History

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

Describe the Process - How this is going to work today

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

The Four Principles

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

The Law of Two Feet

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

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

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

Jumping In

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

Sign-ups

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

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

Guiding Metaphors

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

Guiding Intentions

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

Answers to every question

- what do you want to do?
- great, why don't you take care of it?

Key Questions/Instructions

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

Closing

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

Documenting What Happens in Open Space

The following is the proceedings template created as an MS-Word form document on the computers with fields that restrict formatting by participants entering their notes, makes the document more readable. One copy of template on each computer and finished notes copied and pasted into a single aggregate document, with cover, ballot, table of contents, invitation letter, participant list. Can add a short description of the process, voting results, and action plans to the final (post-voting) draft, if it is to be shared with others who did not attend the event.

ISSUE # :

CONVENER(S):

PARTICIPANTS:

SUMMARY OF DISCUSSION, CONCLUSIONS and/or RECOMMENDATIONS:

This variation on the above template can be printed out on paper and one copy given to each convener as he/she announces their issues in the opening circle. The items in parentheses help further explain the process and the distribution of this notes-taking form reinforces that conveners are responsible for capturing and typing the notes from their sessions.

ISSUE #___: (get an issue # in the computer room, when you type your notes)

ISSUE:

CONVENER(S):

PARTICIPANTS:

(pass this sheet around the circle to collect names of participants)

SUMMARY OF DISCUSSION, CONCLUSIONS and/or RECOMMENDATIONS:

Going Beyond Open Space

usual closings (used every event, see Harrison Owen's OST: A User's Guide)

one or more questions... how are you feeling now? ...what has this time meant to you? ...what have you learned? and/or ...what will you do? (more: what was strange or different, what familiar? how will you sustain what has happened here?)
talking stick passed around in closing circle

convergence (used on day 3 of longer meetings, see the User's Guide as above)

distribute proceedings
read, eat, clarify, talk, choose
vote by computer or by dots method
associated issues (or clusters), action plans, immediate next steps
talking stick passed in closing circle, same question(s) as above

non-convergence (any day/time/length of event, see next page)

news – distribute proceedings as book, gallery wall, etc. and read, review, reflect on most important
now – closing circle with talking stick, question(s) 1-3 from above
next – re-open space for action ...what will you do? what's next? so what? now what? post next issues
nuts (and bolts) – set purpose/scope of issue (invite), who's invited and who will invite (invite list), when/where (spacetime logistics),
what else to do before next meeting (footprints)
evening news – to announce next round of meetings just planned

two-day practice workshop (see www.globalchicago.net/ost for full outline)

rules for ongoing open space (from univ, of kentucky rural health center, page 76)

evaluation - if you absolutely cannot avoid an evaluation form

leave responsibility for the quality of experience, productivity, learning with participants
ask them to evaluate their own work, not work of planners...
what issues did you see get addressed and/or resolved to your satisfaction?
what issues are still needing more conversation and work?
what issues were not raised that should have been?
what are you doing differently as a result of the conference?
what other issues/areas could benefit from similar quality of attention and energy?
can be as simple as: "as a result of this gathering..." (feelings, insights, plans, actions)

griefwork... be prepared to be surprised

"great" events can be followed by real grief, "bad" events can still spark real action
facilitator holds the space for the action and the grief, before, during & after the event

Non-Convergence: Toward Ongoing Everyday Open Space

the following are nothing more than notes. they will be more meaningful if you are already familiar with the prioritization and closing formats suggested by harrison owen in OST: A User's Guide. they excerpted from what i posted in the openspace conference at www.tmn.com/new in winter, 2002.

to read the whole conversation that these notes began, visit the tmn site, click 'new account' in upper right. select a username and password. then join the 'openspace' conference. this is the start of the 'beyond convergence and training' topic in the openspace conference.

beyond convergence: in support of open space as ongoing practice

evolution is now and open space: this is about convergence as control, non-convergence as built-in training, the do-it-yourself open space training workshop, and 24-hour online support.... an exercise in connecting the dots.

when i met harrison at ralph copleman's open space conference (thanks to sheila isakson) six (wow!) years ago, he said something like, "...open space should disappear in, pick a number, say 5 years... that is, talk about it should disappear... as it becomes 'just the way we do business.'" this isn't the average guru sort of statement and it struck me... caught me? ...knocked me down and dragged me away and pressed me (nay, "invited" me) into service of this notion that we might actually be able to run business as usual ...as open space. actually, i'd come into that place suspecting and hoping that this was the case, so i was glad for a concurring opinion from somebody with so much more experience than i.

so this is the direction that i've been working on for some years now, as have many of you, i know. in recent months, i've been connecting a number of dots for myself and seeing some new possibilities for a more integrated and seamless practice to help us work closer to business as open space. i want to connect those dots for you (and me) here and see what any of you might add.

in short, i want to suggest that we might now be able to peek beyond control (and convergence!) enough to see how a mini ost planning could now be embedded into every open space event, long or short, and that the technology we've learned to rely on can let lots more learning and doing go on at once as we move from business as usual to business as open space. i'm thinking that we might now initiate, accelerate or accentuate a shift from convergence to extension, from training to practice, and from broadcast to conversation.

and to be clear before i really start here... NOTHING i say here means to (1) be critical in any way of what anyone is doing with various shapes of convergence, training or anything else.... OR (2) be saying that there is any one right way to do converging, non-converging, training, learning, conversing or any of it... just to be clear.

what i want to do is offer a whole mess of observations, assumptions, and ideas.... dots if you will... and share something of the forms that i see when i start connecting them. to be sure, i suspect that john engle, brian bainbridge, chris corrigan, michael pannwitz, and others are already doing much of what i'm saying here. hoping to root out the truth(s) of this, perhaps fill in a few gaps, and make the whole lot of it available to all.

=====

some observations about opening space, especially day 3 convergence:

-- in november i had my first good opportunity to be part of many (maybe 15-20) followup meetings and conversations after a large (200 person) open space event. in the case of that event, we did the whole sheebang, 2.5 days, computers, listserve and website afterward <<http://www.globalchicago.net/foodsecurity>> and even founded at least one ongoing organization. i got my first good view of the struggles possible when returning from open space to business as usual.

-- at osonos 5 in toronto some years ago, peggy holman initiated a conversation about day 3 convergence and we came up with some options, one of them being open the space again, "for action", in lieu of computer or other kinds of voting for convergence

-- i've watched groups/events of various sizes and temperments cluster and vote and otherwise converge their work in open space into some 'manageable number of what i've been calling 'strategic themes'. we've used words like crunch, converge, crush, collapse... all rather harsh, to describe the essential action.... and i've often felt a subtle rub or resistance to this

-- i know that larry peterson and others have commented on their transposing the 'closing circle' and the voting and converging sessions, so that the crunching work comes clearly after/outside of the 'open space' piece of the gathering... an attempt to use the closing as a time for 'coming back' to the business 'realities' before finishing with voting, priorities, etc.

-- i have used the voting process a number of times and really like it, but i notice that others think it's pretty sexy, too... which is great for me to be a little magical about the whole thing, but not very good for them to feel like they can replicate the process without me and the software.

-- for some time now i have ended meetings and events with an invitation to notice that the meeting was made possible by the 'invitation' of the conveners that was then replicated, in fractal form, by the participants in the opening, then again when they produced proceedings to invite others into the work, and any of the issues in the book could become the invitation to the next open space meeting or event... but we haven't

-- i have been observing the changes in my spine and the muscles of my back since stepping off a small ledge four years ago... most recently i've been exploring a yoga practice, where they use words like 'stretch', 'expand', 'lengthen,' and 'extend'. these words feel more like what i want to do with what shows up in open space

-- when chris corrigan and i were working on the non-guide (ost: a user's non-guide, downloadable at www.globalchicago.net/ost/nonguide/index.html, we had a long conversation about convergence, and he helped me understand some of the discomfort i and others seem to feel with convergence... namely that we're working to make business as usual into business as open space, but the convergence (by clusters, dots, computers or whatever) seems to bow to the gods of management control who have decreed that there must be priorities, choices and a small number of issues identified for where to start... which is how control will be maintained. so we invite them to keep opening, inviting, and letting go of control, even as we finish with a process that seems/seeks to pull everything back toward if not into control.

-- by contrast, we would never limit the number of issues that could be posted in an event and we do have the technology to manage and connect the news of many working groups... so there seems less of a need to reduce 52 issues in an open space event down to a 'manageable,' number like 7.

-- this kind of converging might be appropriate in some cases, like large public meetings that will finish with the elected decision-makers still ultimately responsible for immediate next steps and policy responses.... and the computer voting bit is still magical, but it doesn't seem as likely to result in business as open space... and doesn't seem necessary or feel desirable in most of the places i've been. the most important thing in all cases is still to determine what comes next... so that work can continue to progress.

-- in those situations where i have led convergences, i've learned some elegant little sayings that have been effective in rationalizing the process and diffusing protests: "these are starting points," "you can work on other issues as well," "we will be associating other issues into these categories." still, there seems a need to get past this need to organize the products of self-organization. it seems that we could be gentler than we have with the spirit of self-organization that manifests in our meetings and events.

-- convergence remains one of the thornier issues for open space facilitators and many of us haven't done nearly as much formal converging as we have opening. not only does it 'feel' different as noted earlier, there are so many variations, designs and non-designs. we don't usually 'converge' after very short events. we don't 'converge' with smaller groups, but may choose to 'cluster' or 'crunch.' i think we tend not to design in a 'convergence' unless the 'divergence' we're planning to invite seems likely to get really divergent.

-- and still, every meeting or event, regardless of size and/or duration needs some conscious closing, next steps, or otherwise. we do well in our 'closings' to tend to our 'being,' but i think many of us still scramble a bit with wrapping up the 'doings' in ways that are consistent with the rest of how we practice. my hunch is that in business as open

space, our approach to next steps will be simpler in that it will be easily scaled to fit meetings and events of any size or duration (like so many other components of ost practice).

getting beyond convergence:

-- what i'm proposing now as beyond convergence, non-convergence, a totally scalable, participant-replicable, transparent sort of day3 practice that fits well within the spirit and practice of open space, without the friction or pressure of convergence, and the clear intention of inviting participants to continue to stretch the bounds of organization, extend the work of the event, and expand the circle of invitees.

-- non-convergence, beyond convergence, stretching, extending, expanding is about the establishment of a new organizational yoga, if you will, which can support what has been called ongoing open space, what i have described to clients, participants and the oslist as 'the cycle of invitation,' and what i've begun to think about as the morphing of business as usual into business as open space.

-- this new model for day3 and beyond is not really new. i've already described the seeds of it above, from larry, peggy, osonos v, and elsewhere. here's how it's all finally fitting together in my mind now, though:

-- day three process in four steps: news, now, next and nuts (pretty catchy, eh? i am simultaneously yearning for and being haunted by such little symmetries and alliterations... yuk and yum in the same bite!sorry.)

-- 1. NEWS: this is what we already do. we tell the story of what's just happened. we make posters and stroll through the gallery. we pass out copies of 'the book.' our participants mill around, asking clarifying questions, saying good morning, and beginning to sift out what's most important for themselves and the colleagues (old and new) who they expect to work with on issues raised.

-- 2. NOW: this too, is familiar enough... it's the closing circle. and, yes, i know i didn't say anything about voting yet. this little plan is beyond voting, though you might still toss it in. the idea here, though, is that after the NEWS is out, we invite participants back to the now... as everyone is wondering if any good will *really* come of this event. and so, it's the closing circle... it's 'how do you feel now?' it's 'what has this time meant to you?' 'what is new and different.' ...pretty much just as it's told in the OST User's Guide.

-- 3. NEXT: this is what we talked about so long ago in toronto (osonos5)... it's the re-opening of the space... issues and opportunities for action. it's the posting of sessions that can meet sometime in the next X-Y weeks or months, or perhaps will be convened online in addition or instead. this is where you might choose to vote anyway, but where my preference in future events will be to let the computing of importance be done inside the hearts of those in the circle, having heard the news, noticed the now, and finally looking ahead to next incarnations of these sessions. in this re-opening, the original 52 or 76 or

whatever issues can be re-language based on learning since the morning of day one, they can be combined as those most passionate and responsible see fit, and they can be as numerous as the passion of the people will support. there are no losing issues. things that were finished can slide off the table gracefully. things that are not finished can be restarted in true open space style. where several sessions overlap, they can be combined into one focused project. where learning has occurred, new language can be used to reframe the issue(s) for action. depending on the setting, this re-opening may require some extra work on clarifying 'givens'.

-- 4. NUTS: two kinds of nuts. first, nuts and bolts. immediate next steps. the stuff that must be done between now and the next meeting(s) just scheduled in the re-opening. second, when appropriate, is which other nuts need to be invited into the craziness of this meeting we've been running in open space for the last two days. this is where we turn everybody loose for another 1-1.5 or whatever hours, normally after voting or clustering or otherwise crunching our news document(s) into next nutty steps. the focus of this NUTS session is still immediate next steps, what needs to happen before the next meeting, with a couple of key differences. the meeting was convened in open space, the day3 morning agenda can be proposed as the agenda for those next meetings (see below), and then the working sessions we have can focus more clearly on the work of preparation, invitation, invitation list, logistics, research and documentation for those next meetings.

in other words, these NUTS sessions can be explicit planning meetings for the next round of OS meetings. hence my notion of 'participants' guides... which is a smaller book, for sure. again, this isn't *really* different from what might already be happening in many of our events, but perhaps a bit clearer... and more portable.

-- this news-now-next-nuts thumbnail can be scaled to fit the last hour of a one-day event or the whole last morning of a 2.5-day event. it can also be applied to the followup meetings themselves, assuming they'll likely be more 'usual' meetings of 1-2 hours, rather than full-blown os events. in this case, the NEWS is the reports of progress (which might also have come before the meeting, as a string of email updates/queries on a listserve), the NOW is an open identification of what's 'up' and needs addressing at this meeting, the NEXT is setting up the next meeting(s), and the NUTS are, again, the immediate next steps and who else gets invited. as i say, not really new, and this seems it's primary advantage: that it is not radically new and yet it can still be connected back to what we did in the larger, longer event. business as usual becoming business as open space.

-- in those situations where a full-blown 1- or 2-day ost event is not going to happen, this might be a model that can work as a prelude without ruffling feathers and still feel to us like we're fully within the bounds of our opening practice.

-- for those familiar with ICA's (institute of cultural affairs) technology of participation (ToP), i noticed after penciling this out that it loosely mirrors that process: observe, reflect, interpret, decision... observe what's past, reflect on current feelings, interpret and analyze for the future, then choose or otherwise go do.

-- for those familiar with the lingo of tibetan buddhism, this also seems to fit the 'four time realms' they mention in teachings: past, present and future... and the timeless realm. not at all studied in what these mean, but the first three seem simple enough and the last one i take to mean that a whole bunch of stuff gets done between meetings, supported with email or phone calls or lunches or whatever: while the bigger body of the larger group is between incarnations... so that when it is reconvened, reconstituted, apparently reincarnated, what once was nuts is now news, history. this seems like good progress.

-- and finally, for those with a preference for a certain pattern-integrity or pattern-symmetry, it's reassuring that this news-now-next-nuts template fits what we did in the first 2 days of the OS meeting... asked the sponsors to open with the story of 'how we got here' (news) ...then the facilitator walked around the circle and asked everyone to notice the people, the issues and opportunities... (now) ...invited (next) issues to be posted ...then got out of the way as participants got down to business on the nuts and bolts of those issues. so to finish/followup in this news-now-next-nuts way is really to repeat the cycle we used at the opening.

to repeat it often is to establish it as practice.

Rules for Ongoing Open Space

...as developed at University of Kentucky Rural Medical Center and reported by Lloyd Kepferle in Harrison Owen's Tales from Open Space.

Eliminate constraints on the following:

- Who can call a meeting.
- The type of problem or opportunity that is being addressed.
- The availability of time to have a meeting.
- Who may attend a meeting.
- The availability of information necessary for a group to work.

Personal empowerment is constrained by the following:

- When a problem or opportunity is to be discussed, there must be wide notification of the meeting time and place so that anyone who is interested can attend.
- Proposed solutions/ideas must be broadcast widely so that they can be acknowledged as organizational policies, programs, or procedures, or, if they are contradictory to organizational rules, another solution can be sought.
- Proposed solution cannot be hurtful to anyone else.
- Proposed solutions should channel limited resources so that they have maximum impact on achieving organizational goals.
- Accomplishing the work for which people were hired takes precedence over the group work. However, if the right people (those who really care) are involved in any topic, they will find a way to make sure their work is completed and the work of the group is brought to a successful conclusion.

Through these simple (ongoing) practices and procedures, any ordinary, formal organizational structures can remember how to stretch and yawn and open on any given day, whenever the impulse and purpose and need arises. In this way, organization can transcend (not replace) its old ways of being and include (more fully and consciously embody) this new thing we call Open Space.

Embodying Open Space

This might be simultaneously the most laughably basic and most startlingly advanced bit in this collection. It defies classification as either spirit or practice, so I am sneaking it in here at the end. Maybe now, having satisfied our hunger for the technical details for "getting it right," we will be able to notice that open space already is. We have only to breathe it in, and let go.

We know that Open Space Technology enables groups of any size and mix to do extraordinary work together, but it need not be rationed as the occasional organizational treat or held in reserve as a secret weapon in times of crisis and wildfire. Indeed, what happens in Open Space is simple enough to do everyday and powerful enough to help people and organizations become what is needed most.

So what do you want to become?

To approach everyday work in the spirit of Open Space, is to make some simple, though subtle shifts. We shift our attention from what is wrong to what is right, from problems to what's working, from what we want to go away to what we want to be, from what scares the bejeezus out of us to what really excites us, from perpetual firefighting to purposeful goldmining.

We write open invitations, little maps to the gold, sharing our desires and dreams, large and small, and posting them for everyone who might want a bit of the gold we're after, who might be able to help dig and carry. These simple invitations, shared in emails and bulletin boards, begin conversations with the people who share real passion and are willing to take responsibility for making something important happen.

Then we keep that passion closely linked with responsibility, "what do you want?" with "what are you willing to do about it," put your money and time and energy where your mouth is, and "great question, good idea, why don't you take care of it?" -- at every level of the organization.

And lest we get overwhelmed by all there is to do, we continually remind ourselves that less is more -- that continually looking for one more thing to NOT do needn't sacrifice hard business results on the altar of softer people objectives. 'More easy' need not equal 'less effective.' Indeed, it usually means we can have more of what we want with the same amount of effort and resources, or can keep all we have now for less. But we have to be willing to say so openly, invite it explicitly, connect it closely, and practice it continually, in the open space of everyday living and working.

Imagine sitting on the porch, blowing bubbles in the afternoon sun, with a young child. If it's only about the bubbles, it might get old in a few days. But if sitting in the sunshine and blowing the bubbles are allowed to become the backdrop, the gathering point, the

ritual that allows us to discover what is happening at school today and see what might be coming next. The bubbles will all look pretty much the same, but the conversations will be new and different everyday. What can that child become through this kind of practiced, careful, attention to each day and each bubble?

And what can people and organizations become through the regular, careful, practice of Open Space Technology, which is not really about the bubbles, the events, the principles, processes or proceedings documents, but about shining some light on what we really want to -- and really can -- become in organization, in open space? The answer, I think, is anything they really want to.

...and where to begin?

In my experience, in a variety of organizations, this begins with what is best about what and who we already are, with making my own individual list of "what's working," BEFORE we make the list of what's "to do." I update both lists weekly, or even daily when things are really moving. And I like to post my lists or otherwise make them as open and accessible as possible, so everyone knows where I think I'm going. As often as not, the things-to-do are really the questions-that need-answering and my lists are an easy way to pose those questions to the people and groups who will make up the answers.

These lists also make it possible for me to call meetings with a clear purpose, because I see something that needs doing that I can't accomplish by myself. I invite everyone I think I need to get something done or who would be interested in what's happening. The people who can't make it probably don't have time to help, so I'd rather have them not show than make them attend and press them to sign up for action we both know they just don't have the time, energy, or whatever to get done. The truth about what is not going to happen is as important as the truth about what is.

Then I begin each meeting by inviting a rapid-fire, just-in-time, up-to-the-minute, conversation to create "what's working" and "what's most important to do" lists for the group. If my own list is up-to-date (which is different from being complete or correct), then I've got all the information I need to make this invitation and lead this conversation. And even if you don't get to discuss everything on the list, everyone still leaves the meeting crystal clear on the entire vision, so any items not covered can happen more easily before the next meeting.

At the end of every meeting we create a "who's-got-what-by-when" list which is distributed to everyone immediately after the meeting. This list, and all progress or non-progress on the issues identified, becomes fodder for the "what's working" and "what's to do" lists at the next meeting.

And finally, as the world changes, we keep in mind that less is more and are not afraid to let individual tasks fall off the list before we finish them -- regardless of sunk costs, individual egos and organizational politics -- if and when real changes in business needs render them irrelevant. We use the law of two feet and literally walk away from those

things that no longer provide real learning or contribution, for ourselves, our customers and/or the organization.

Call it a practice in paying attention -- a continual identification and documentation of the organization, department, or project team's bliss, the regular posting of strategic invitations and hosting of strategic conversations. As we do this practice, we move closer and closer to what's REALLY most important at work, closer and closer to the crest of our evolutionary wave. And as our little wave gathers momentum, it's only natural that we'll find ourselves making lists of bigger questions and inviting more and more different people into the circle to address them. It's not always easy, but it's not a bad place to be, either.

It's Already Now

We can appreciate open space stories. We can read articles and books and begin to understand how it works, perhaps even envision using it in places where we live and work. If we go further, we can enact open space in those places, go through the motions of writing the invitation, walking the circle, explaining the principles, opening the marketplace. We know that if we do this, we get better meetings, toward better organizations. And still there is more; there is the potential to embody openness, movement, spaciousness and power in organization, as organization. And this embodiment starts with one individual, a facilitator, a leader, a manager, perhaps, but not necessarily.

To understand the difference between appreciation, envisioning, enacting on the one hand and actually embodying on the other, the practice gets so much simpler than open space technology, or even blowing bubbles. It starts with one person, you or me. It starts as simply as yawning, yes, yawning. We've said open space technology runs on four basic mechanisms: circle, bulletin board, marketplace and breathing. The first three, however, get most of the attention. So now, it's time to focus on the heart of it all. Breathing. Really spirited breathing. Breathing that takes your breath away. It's called yawning!

The practice can be as simple as taking a few minutes to yawn one hundred times or taking five minutes four times through the day to do nothing but yawn. Let yourself yawn as big and open as you can on each inbreath. Let yourself say 'aaaaahhhhh...' as loudly or softly as feels good on each outbreath. If you're able to have a few minutes of napping after each yawning session, the benefits will sink in deeper and last longer. And the benefits are many, but you can discover them for yourself.

We have said that open space is a practice in invitation. So invite yourself to yawn. Open a bigger space inside yourself. Stretch a little. We've said open space is about finding one more thing to NOT do. Yawning is a great way to not DO anything. We've said it's a practice, this opening of space. And yawning, too. Can you yawn on every breath or does it take some practice. Are any yawns the same? And we've said open space is about letting go of traditional control. Are the best yawns not spirited little moments when your breath seems to take you away, as you ease up to an edge, slip over, and then come back

renewed, stretched, open, bigger? These are just a few of the ways that we can begin to embody the invitation, practice and letting go that are open space. But open space is also about passion bounded by responsibility, so you'll have to practice this yourself to really embody the spaciousness of it all.

And as you do practice, five minutes here, five minutes there, see if you don't find that all this yawning leads to what you might call a better way to be alive as body, in the same way that open space technology, invited, practiced, surrendered doesn't lead to better ways to be together as an organization. You might notice how many times you're able to have big, climactic, breathtakingly stretchful yawns in that five minutes. You might notice how long your 'five minutes' really lasts. You might look around in your body to see what shifts occur away from the apparent center of your yawning. Notice, perhaps, what you do with your attention while you yawn. Where do you focus, concentrate, cajole or otherwise try and effort? Does it help? And finally, notice how you are with others after one of these sessions. Does it help your work? Does it radiate?

Then look to see the same subtle shifts in organizations in open space. Yawns and other openings happen already, all the time. But the intentional, invitational practice of these kinds of little, momentary, subtle surrenders still hold great potential. Or more accurately, we all have great potential for spacious, easy movement. The heart of the challenge of opening space in organizations and communities, however, seems to begin with an invitation to ourselves... to breathe, to stretch, to open, to yawn. And I think the spirit that moves organizations in open space must come from deep down inside of all of us, from the same place that those big, stretching, catching, deeply satisfying yawns come from. All we need to do is find that place, to find that we already embody it all...yawn...aaahhhh.....yawn yawn yawn yawn....ah
ahahahahhhhaahhaaaaaahhhhhh...oh!

And you know that yawning is contagious. Just reading the word yawn on this page may already have you yawning. Open, yawning, spaces resonate deeply, ripple out easily, radiate brilliantly ...through body, in organization, as community... as we become the peace ...yawn...aaaaahhhh... that we wish to see in the organizations of our world. And so we are yawning, yawning, yawning, opening, opening, opening ...until people and organizations finally, groaningly, grinningly, wake up.

* * *

Body rests like a mountain

Breath moves like the sea

Heart like the sky

Worldwide Resources

Books by Harrison Owen (see also www.openspaceworld.com for articles)

- Open Space Technology: A User's Guide, 2d edition
- Expanding Our Now: The Story of Open Space Technology
- The Spirit of Leadership: Liberating the Leader in Each of Us
- The Power of Spirit: How Organizations Transform

All published by Berrett-Koehler. Available online and in stores

www.michaelherman.com

A "WikiWeb" ...state-of-the-art online documentation and follow-up for working in Open Space. This wiki demo contains a wealth of open space information and resources, including articles, books and archives to browse or download, practice notes and adaptations, stories and soundbites, sample invitations, training and practice workshops, reading list, worldwide links, and the home of the midwest open space regional practice group..

www.openspaceworld.org

Introduction to Open Space Technology available in eleven languages, bulletin board, worldwide links, local and regional practice networks, conferences, trainings, and more. The new .NET address will be an online (wiki) posting and projects place for practitioners and community groups using OST worldwide.

[OSLIST worldwide email listserve](#)

The heart of Open Space Worldwide, with more than 300 practitioners in ongoing, online conversation, serving as a 24/7 global help desk and community coffee shop.

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