

A Practical Guide for Open Space Technology (OST)

An Open Space (OS) is a simple but effective people-driven process which identifies critical issues, voice passions and concerns, learning from each other, and taking collective responsibility for finding solutions.

Therefore, the ultimate goal of an OS is to create time and space for people to engage deeply and creatively around issues of concern to them.

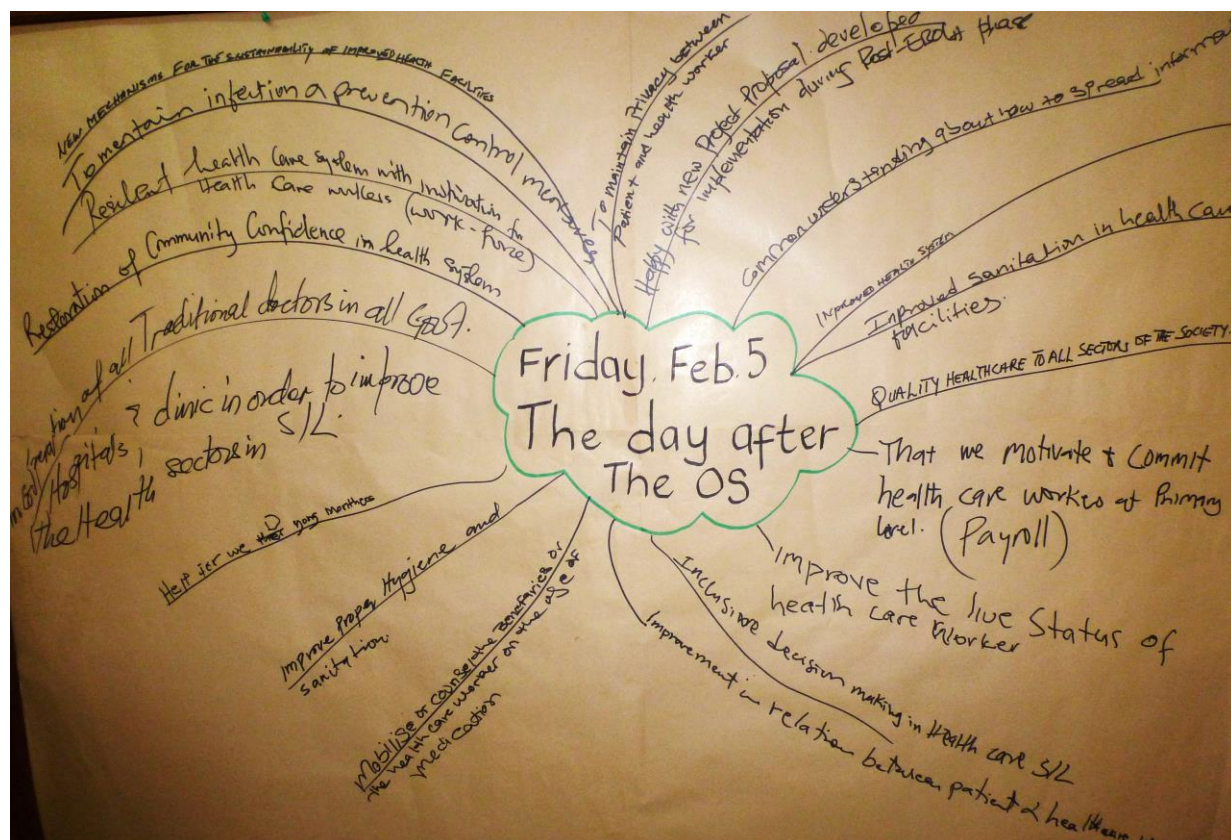
This practical guide highlights various aspects and stages of an OS.

Preparatory Meeting

Who should come to the preparatory meeting?

Everybody who is needed

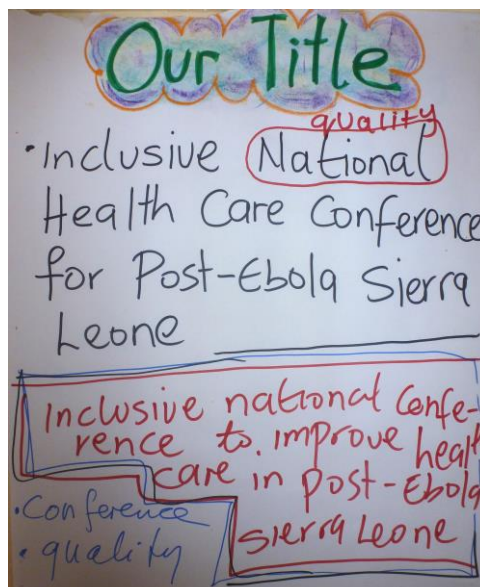
to answer the question or solve the problem at hand will be invited to the OS. A cross section of members of groups or stakeholders participating in the OS should be present at the preparatory meeting.



The day after the Open Space

- What will it be like?
- What will be different?
- What will be new?

Together participants create this mind map in the preparatory meeting to find out what they expect from the OS. One person after the other gets up and writes.



Participants work in small groups or pairs and later in the large group to find a title for the OS. The title should work well as an invitation to others and capture the general topic to be worked on. In a second step, participants vote for a title with 2 or 3 sticky points per person.

The preparatory meeting can be held three months before the conference but it can also be done two weeks before, depending on the size of the conference. Bigger conferences need time to organize therefore it is advisable that enough time be given between the preparatory meeting and the conference.

Open Space Technology Planning Checklist ¹	
TASK	DONE
PRE-EVENT PLANNING	
Hold pre-meeting with facilitator to organise conference and pick theme	
Determine whom to invite, set target number for attendance	
Set date	
Select space (make sure it is okay to put tape on the walls!!)	
Main Room (adequate space = room capacity/2)	
Optional Breakout Rooms (5 per 100 people)	
Registration area	
Create invitation	
Send invitation	
LOGISTICS²	
Work with "Space" staff on set-up	
Provide an article or book on OST to staff	

¹ See document detailing planning and logistics (Appendix 2)

² See document detailing planning and logistics (Appendix 2)

Set up circle for main room, flexible breakout room configurations	
Get list of breakout room names or symbols, signs and plan to lead to rooms	
Arrange details with caterer (breakfast, lunch, dinner, breaks)	
1 printer	
Arrange for wireless microphone, plus spare battery	
Get supplies	
Masking tape (1 roll per breakout room)	
Markers (x per breakout room, x for main circle)	
Flip charts (1 per breakout room, spare chart paper)	
Paper for Issues (A3 paper; more than # of people)	
Presentation Cards (x in 3 colours per breakout room)	
Travel Support (hotel rooms, transport)	
Name tags and other welcome materials (journal, pen)	
Cover for proceedings	
Set date for debrief	
Arrange for copying report sheets	
Arrange for typing participant phone numbers, addresses for proceedings	
PREPARING THE HALL AND DAY OF EVENT	
Make time/room matrix, signs (law, principles, surprise, mission control, theme)	
Set circle of chairs, put supplies in break out rooms and circle	
Prepare sponsor and Head of organization for doing opening and their role	
Set up registration table (sign, name tags, pens, list: names, phone, address)	
Set up registration table, signage, News Wall, computers, microphone	
POST EVENT	
Hold debrief	
Copy and distribute proceedings	
Write thank you notes	
Any measurement activities?	

Based on a template originally designed by Peggy Holman

Preparing the Site

Depending on the number of participants, one large meeting room with a large blank wall on which tape can be used, is required as well as several break-out rooms. One break-out room for 20 people is usually a good formula. **Break-out rooms** should be set up with chairs in a circle. No tables are required. Every break-out space needs flipchart papers and in a box: presentation cards in different colors, markers, black fine liners, masking tape and a clip board with 6 report forms.

Seating in the large meeting room is in one large or several concentric circles depending on the size of the group. No tables. Create a pathway to the bulletin board (2-4 chairs wide) and two more additional entries to the circle/center (2 chairs wide).



The largest wall or pin boards will be used for the **bulletin board**. On the bulletin board wall, create a time/space matrix that will accommodate the sheets with the issues brought forward. This is where the agenda will be built. Across the top of this grid, plot out the time in one hour or 90-minute slots for the day(s). Starting and finishing times may vary by design (see example of a two and a half day OS at the end). On the left-hand side of the matrix list all the breakout rooms/areas by symbols or by numbers (if more than 8). Place two small "loops" of masking tape in each of the grid's rectangles so that the sheets with the offerings can be fixed to the grid by the convenors of the various conversations. If there is no large wall, use washing lines and clips for the agenda.

Supplies needed include flip chart paper, masking tape, markers, a photocopy facility with spare toner, enough A3 and A4 papers (see details on the check-list above).

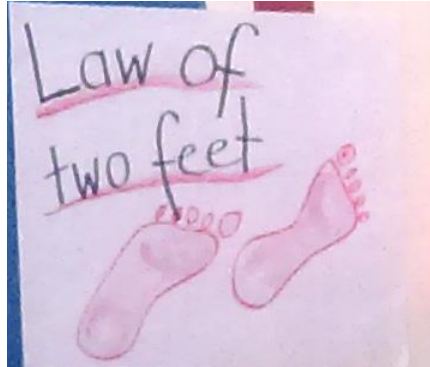
A **Public Address System (PA)** with microphones (if possible wireless) in the main meeting room is ideal with groups of 30 or more.

Posters to prepare and to hang up:

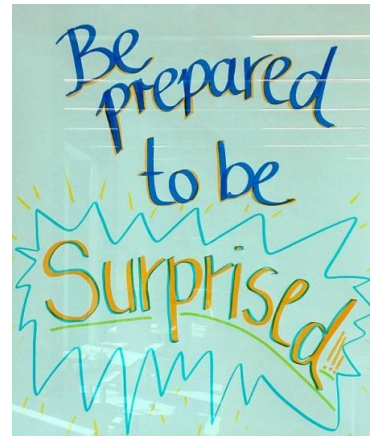
1- Welcome to the Open Space



2-



2-



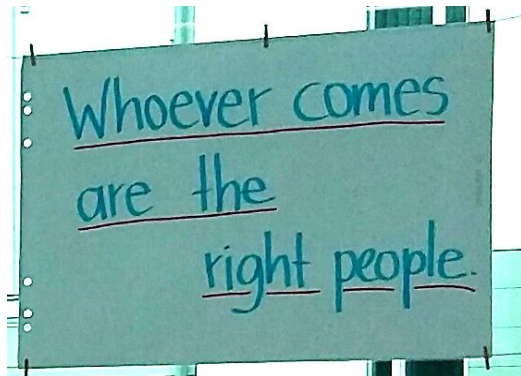
4-



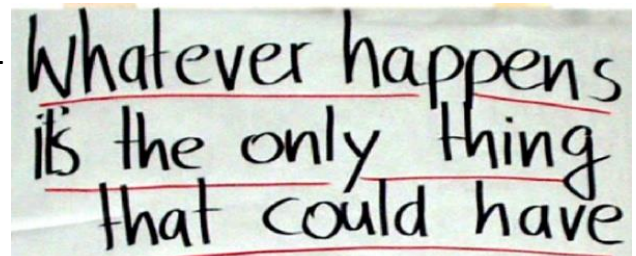
5-



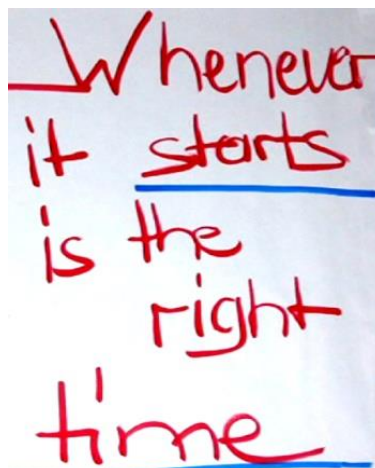
6-



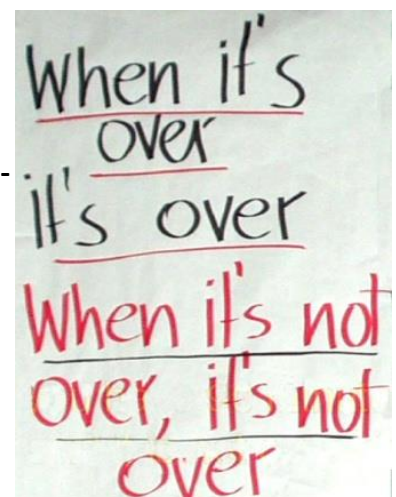
7-



8-

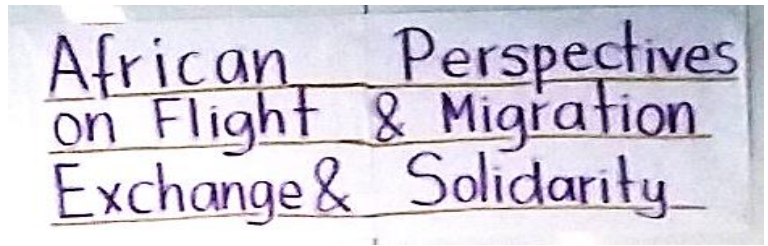


9-



10- The Theme of the Open Space

- Large poster, several sheets of flipchart paper glued together
- Above Bulletin Board
- Hung so that it can be seen well!



- **Signs to prepare (simple, handmade!)**
- Registration
- Office
- Reports
- News wall
- Archive
- **Directional signs to find the break-out spaces** – use symbols up to 8 spaces or numbers
- **Name-tags** prepared, or use masking tape for self-made name-tags
- **Have a clipboard with several report forms and a black fine liner ready for presentation during the introduction!**

A script for Opening the Space

Head of organizing organization: Very short *introduction*, supporting the idea of the Open Space

Welcome to Open Space

"...look around, please, and see who's here. You're sitting in a circle of friends, colleagues and perhaps some strangers, too. It looks as though all the resources we need are right here in the room", so many years of life experience if we add all the years each of you has lived together.

State the theme

- 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.

A Little History of Open Space Technology

- Over 30 years, 5 continents
- Government, community organizations and villages on all continents, corporate boardrooms, all kinds of Churches, the Peace Corps and the Pentagon, Banks and Companies, school leaders and youth groups... with anywhere from 5 to 1000 people at a time
- Outstanding results -- it will work here, too

Describe the Process - How this is going to work today

- 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 big empty wall will be our agenda. What is now a giant empty space, will be, within short time, filled with discussion topics related to the theme, filled by you, the people now sitting in the circle.
- Identify some issue/opportunity related to our theme
- Something you have a real passion for and will take personal responsibility for starting the conversation about it
- Don't have to be an expert with answers, you need to care enough to ask the question and start the conversation
- If nothing occurs to you, fine -- if you have more than one topic, post them on separate pages
- In a minute, you will be asked to come forward, grab the paper and markers
- Write your topic and your name
- Read it out -- "my name is ... and my issue is...."
- Choose a time and a break-out space
- Post it on the wall so everyone who shares your interest can find your conversation

OS conferences are guided by four principles and one law:

The Four Principles

- **Whoever comes are the right people**
 - don't need 100 people 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 could, would and should and go with the flow of what is here and now
- **Whenever it starts is the right time –**
 - Remind participants that spirit and creativity don't run on the clock
- **When it's over it's over – When it's not over, it's not over...**
 - if you finish in ten minutes, don't continue and repeat for another 50 minutes...move on
 - you might have to move, because the next group needs the space but don't have to end

The Law of Two Feet

- 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, take a walk, 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.
- This law is death to egotists and speechmakers
- **Bumble bees** are those people who take the freedom of the law very seriously and move from meeting to meeting. So if someone has left a group to join yours, welcome

them, because they are pollinating and cross-pollinating, lending richness and variety to the discussions.

- **Butterflies** are rather different. Often they don't even go into a meeting. At first glance it is difficult to see what they are contributing. The truth is that butterflies do very little. They create centers of non-action where silence may be enjoyed or some new, unexplored topic of conversation engaged with someone that stopped by.

"If at the end of the day you will leave with the same ideas you came with, you have wasted the day. I invite you to be prepared to be surprised!"

"Now let's start with the **agenda-building**.

- "We have markers and paper in the middle of the circle and I will invite you to come up and write an issue or theme you wish to explore with others. This is your "offering". If you wish to offer multiple sessions then please submit each one on a separate sheet of paper."
- "Write your burning question, passionate issue, or great idea for a session and sign your name. Leave enough space for people to sign up for your session. Then stand at the microphone in the center of the circle and only state: "My name is _____, my issue is _____"
- "Take your A3 paper to the time/space matrix and place your offering on the wall. This is how we build the agenda: the where and when of Open Space. Then after that, please return to the circle and sit down."
- "Remember Open Space is all about taking individual responsibility which also means that you do not have to offer anything at this time if you so choose. You may simply wish to participate in the sessions offered by others."

Reporting is crucial

- Main points need to be kept on a flipchart so newcomers can join the group
- Convenor of the meeting is responsible for finding someone who writes the report on the form. (as long as s/he has done that, s/he can also decide to follow the law of the 2 feet)
- At the end, the report form with a brief summary of the main points has to be handed in to the reports desk. The team will fix it to the News wall and will include it into Book of Proceeding

Agenda setting



The agenda is created by the people present in the room. Having explained the process, the facilitator invites the group to create the agenda by identifying topics that are important to the individual regarding the theme.



The individual puts his or her topic on a sheet of A3 paper along with his or her name announces the topic to the group, and then posts the topic on the agenda wall. Assigning room spaces and times for the topics is done with the help of prepared sticky notes (Post-its). Use different colored “sticky notes” for each starting time, a symbol or number for each break-out space, place them next to the bulletin board. Alternatively, you can create a time/space matrix, a grid with the spaces on the left-hand side and the time slots on top.

Market Place

When all the topics are up, everyone goes to this “marketplace of topics” and signs up for the topics of discussion that interest them.

At this stage, replace black markers in the center of the circle with red ones, so that people can see when new topics have been added later.

Setup break-out spaces in the main hall.



Break-out Groups

Convenors have to ensure that someone is writing the report of the meeting. Every break-out space needs to have fine liners and report sheets on a clipboard. The reports will be handed over to the OS team after the meeting, numbered and photocopied for the Book of Proceeding and once in A3 (A4 also possible) for the News Wall where a team member pins it straight away.

After every session, break-up spaces have to be put in order by the team, and used materials have to be replaced.



Holding Space and Time – the Role of the Facilitator

The role of the facilitator is to open the space and to hold safe space open.

The facilitator explains the process and structures it until the agenda is set. The group self-manages the discussions and produces a report of the proceedings at the end of their discussion for all to read. The facilitator and the team oversee that materials are sufficient in every space, reports from each group are being handed in, photocopied and put on the News Wall.

The facilitator reconvenes the group as a collective whole at day's end and in the morning again in a multi-day event. Following the generation of all of the reports, the facilitator moves into a more guided process to identify priorities of the group and then to identify next steps and future action. This portion of the meeting takes about three hours, whether it is a two- or three-day meeting. In a one-day meeting it takes about one hour.

And then there is a closing circle, further identifying the commitment of participants to the theme and to the future and getting feedback about the day.

Documentation

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.

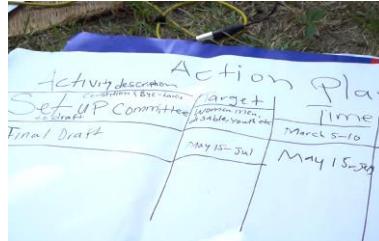
Different forms of documentation

- flipcharts/gallery wall of posters
- template passed out to conveners
- photocopy handwritten notes
- computer typed notes
- action plan forms with immediate next steps

We like doing it this way: handwritten reports on A4 report sheets (as the basis for the book of proceedings), if possible enlarged to A3, otherwise A4 for the news wall for everybody to read before the action planning starts and numbered for the book of Proceedings. Create a table of content for the book. It can be useful to type handwritten notes for later reports.

If possible, also include ,Next Step' form into Book of Proceedings. Definitely include the contact list!

Action Planning



Participants hang up their ideas for next steps and announce them. Other participants can sign up with contact details if they want to take part in the activity and if it is realistic that they can.

Contact list

The Contact List will be started as a separate document before the Open Space event by the organizers. The preliminary list will be produced as the participants are signing up for the event.

The files will be available at the beginning of the event. The list will be printed (enlarged on A3-paper) and posted on the wall in the meeting room. Participants may then add, remove or edit their own data. The final version will then be included into the Book of Proceedings that every participant will take home. It enables the participant to stay in contact and to work together on their plans and projects created during the event.

Ending – Closing the event

Ask 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 was familiar? how will you sustain what has happened here?)

A talking stick passed around in the closing circle. Participants can decide whether they want to say something or not.

Follow-up

Plan a follow-up meeting to see if the action plans worked or need to be altered, or something has to be added. Set a date by the end of the Open Space or inform all participants later.

If a meeting is not feasible, find other ways to follow-up and to help the ideas and plans generated at the Open Space to develop further and to yield useful results. Find ways to continue to connect people and support the projects that have started. After the Conference, that's when the real work begins!

Put sufficient effort in the follow-up design to prevent Open Space becoming a “talk-shop”.

Here is an example of a 2.5-day Conference Agenda

© Michael Herman

Conference Agenda

The '[Giving Conference](#)' will take place in Open Space, a powerful way to get people working FAST. In Open Space, there is no pre-determined agenda, but there is a bit of a pre-set *schedule*. Here is a little flavor of how this works...

Day One

Gathering... at 8:30am on July 9th.

Opening... people sitting in a circle, many of whom who have never sat in a circle, so this is a little strange scenario, but there is a sense of anticipation, and certainly as the sponsor begins to introduce things and the facilitator begins to walk around the inside of the circle, people are challenged to make something new. The level of excitement increases.

Agenda setting... folks create an agenda that uses the whole facility as a meeting space, that centers on small invitations to convene intimate dialogue sessions, or that asks questions of the assembled masses, to attract expertise to a topic, to figure out how to move things forward.

The Marketplace... the agenda items are out, and one wall of our meeting room is covered with topics, arranged by time and place. We have an agenda. People are invited to go to the wall, look around, decide what to attend, which discussions to contribute to, which opportunities to learn from. It's chaotic and loud but people are beginning to sink their teeth into what's on offer.

Working Sessions... it starts slowly but warmly. Small groups gather. People meet each other, toss ideas out, poke around the edges of assumptions, find natural allies. Conversations convene and disperse, and notes are entered on Report forms or into laptops and collated into a real time book of proceedings.

Evening News Circle... a time to regroup at the end of the day, about 5:30pm.

Evening... people are tired, but charged up. There is inspiration in the room and the dialogue is humming... There is a sense of possibility that something really interesting might be happening. The anxiety from the morning is gone, replaced by curiosity and an emerging sense that things are changing. Evening news features some feedback but also evening plans, hopes for the next day, thank You and challenges.

Day Two

Gathering... once again at 8:30.

Morning News... a few more topics are proposed in the morning news session, some overnight dreams and insights are shared but then people quickly get down to work.

Working Sessions... dialogue deepens quickly and people are surprised by how projects begin to take shape, how assumptions shift and new connections are made at deep and powerful levels.

Evening News Circle... a time to regroup at the end of the day, about 5:30pm.

Evening... Tired again and hopeful that something concrete can come of it all. Looking forward to bed... Book of proceedings is printed out, and copies are made for everyone.

Day Three

Gathering... once again at 8:30.

Results... The facilitator introduces this day as focusing on action planning. Thick books of proceedings are sitting in the middle of the circle. You have done this. You have produced these 150 pages of conversations, notes, sketches of the future. Today is the day to get it out of the room. To let passion guide your direction and use your responsibilities and abilities to attract the resources we need to make it happen.

Reflection... People go away for an hour and read the book and consider their responses to it. What patterns do I see? Which projects beg to be undertaken? What can I do? What WILL I do? It's quiet and introspective. Small hushed conversations may begin but mostly people are really asking themselves what they are now capable of doing.

Re-Opening... We open the space again and this time we invite action. We invite projects to come forward and we invite people to work on them and create the commitments that take them out of the conference setting and back to the real world. There is no more time to rehash the issues...the time to implement is now.

Action... groups meet, convening around the tasks that people volunteer to champion. Conversations are recorded and the invitation is put back on the net to attract others to the projects. People come back into the closing circle to report on their work and are surprised and delighted at how deep and how easy it has been to initiate change. A closing circle ends the ritual and people say their farewells.

Closing Circle... will end by 12:00pm or so, with the afternoon available for lunch, loose ends, resting or sightseeing.

After the Conference

The Work BEGINS... Now we have to find ways to continue to connect people and support the projects that have started. We provide them with places and methods to communicate. People leave with a job to do, self-designed, self-assigned, supported by the sponsor of the meeting and assisted by workgroups both large and small.