

November 2008

## **Co-Creating Conference Agendas through Open Space Technology: Tapping the Wisdom of Participants**

### **IN THIS PRACTICE NOTE...**

There is a way for conference organizers and facilitators of convenings to invite participants to create their own agendas without losing focus or slipping into disorder. Open Space Technology is a method of convening through which participants create their own agenda of work sessions. The method offers a light structure for drawing upon the experience, creativity and wisdom of participants in a way that calls for accountability and responsibility in taking up issues of importance.

This Practice Note shares lessons about integrating Open Space into conference design and achieving a balance between what is offered by organizers and what is invited from participants. Open Space Technology has traditionally been used to organize entire events. Insights presented here are more relevant for event organizers integrating Open Space as a portion of their event's program, although some lessons can apply to contexts where an entire event is designed in Open Space mode.

### **The Experience ...**

In September 2008 scholars and practitioners from around the world discussed varieties of action research practice at a conference in England organized jointly by the Research Center for Leadership in Action (RCLA) and the [Centre for Action Research in Professional Practice](#) (CARPP). Both centers have a rich experience in action research – research that integrates action and reflection and aspires to create knowledge that is directly relevant to the issues being studied. Unlike conventional research, action research is based on increased collaboration between academics and practitioners on an inquiry project, rather than treating academics as detached observers and practitioners as 'subjects' of research.

Participation is the hallmark of action research. It was thus congruent with the ideals of the conference theme that the design was participatory. We combined Open Space Technology with interactive workshops designed and delivered by conference organizers. Integrating Open Space into the program both honored the experience of the participants and enriched the conference with varied perspectives.

RCLA Practice Notes offer practical guidance about sound leadership practices by drawing on leaders' experiences using various techniques, tools, and approaches in dealing with critical social issues. More information is available at [www.wagner.nyu.edu/leadership](http://www.wagner.nyu.edu/leadership)

## Open Space Technology at a Glance

Open Space Technology (OST) was created by Harrison Owen<sup>1</sup> after observing that in traditional conferences participants best love the coffee breaks - the parts conference organizers/facilitators have nothing to do with. OST was designed as a method for organizing a meeting or conference where participants create their own program of work sessions. In these concurrent sessions participants explore issues that interest them most. OST is documented to have been used in multiple settings all over the world with groups ranging from as few as ten members to over 2000<sup>2</sup>. It has usually been used when there is complexity, diversity of thought or people, conflict, and/or short decision times – contexts where more traditional meeting formats often fail.

OST is founded on passion and responsibility – passion for engaging with the issues that are of most importance, and responsibility for initiating discussion around those issues. Although OST is a method for convening people, it is also a philosophy and a life practice, according to its founder Harrison Owen. Because it encourages co-creation and self-organization, its principles and practices can be used to facilitate self-organization in the workplace or the community.

### How it works in brief

Conference organizers introduce OST and invite participants to convene breakout sessions if they wish. Each convener from among the participants jots the title of their session on a poster or a large Post-It note, says a few words about the session, and posts it on the wall for all to see. Participants sign up for the sessions they wish to attend or can choose to be ‘bumblebees’ (moving from session to session) or ‘butterflies’ (hosting spontaneous conversations). After the breakout sessions take place the large group reconvenes to share what has transpired.

### The principles<sup>3</sup>

- Whoever comes are the right people – This principle is a reminder that it is not how many people or the position they hold that counts; it is their passion for the subject that is important. Participation is voluntary. Even if no one shows up to the session, its convener can still decide to work on his/her issue.
- Whatever happens is the only thing that could have happened – It is in the moments of surprise that learning and growth occur. Let go of expectations and don’t dwell on what might have been, should have been or could have been.
- Whenever it starts is the right time - When it comes to creative interchange and spirited inquiry, the clock is not the final arbiter. Things start when they are ready - not before, and not after. [Using OST for a portion of an event requires a small variation on this principle. Conveners may designate a certain time slot within the overall program for the Open Space.]
- When it’s over, it’s over – If it takes less than the designated time to explore the issue at hand, move on to something else. Don’t waste time when the moment has passed.

<sup>1</sup> See <http://www.open-forum.de/Interview-Harrison-Owen.htm>

<sup>2</sup> See <http://www.openspaceworld.org/>

<sup>3</sup> Ibid

- The Law of Two Feet, also known as the Law of Mobility<sup>4</sup>, encourages participants to take responsibility for what they love. This is a reminder for participants to go somewhere else if they're not contributing or learning where they are.

## Organizing an Open Space Session

As mentioned earlier, OST was conceived as a method for organizing whole events. In our experience we have integrated OST with other methods for facilitation and dialogue. Here we share some pertinent lessons learned from our conference on Varieties of Action Research Practice.

### Assess whether Open Space is right for you

OST will not be the most suitable method if conference organizers wish to remain in control of the content presented and if the general idea is for expert panelists to impart knowledge to a (relatively passive) audience.

On the other hand, conference organizers are likely to enjoy and benefit from OST if they believe in the power of participation and seek to honor and tap the knowledge and experience of participants. OST can be a great opportunity for organizers and facilitators to learn more deliberately from the participants.



In the case of the RCLA/CARPP conference both centers had shared a history of participatory research that aspires to create relationships of co-inquiry and learning between groups that have traditionally been bifurcated as 'academics' and 'subjects' of research. Therefore, using OST was not only aligned with the theme of the conference, but was also a chance to put into practice our commitment to engaging everyone fully as co-inquirers.

### Consider the overall conference design

In organizing a session(s) based on OST, conference organizers need to consider how it fits within the overall conference design. It needs to have a clear sense of purpose and not merely be used as filler for when facilitators are short of activities for participants. Issues to address when integrating OST into a conference program include: Timing – is it better to start off a conference using OST or to work it in after more pre-structured activities have taken place? Duration - how much time should be allowed for Open Space in relation to the length of the entire event? Repetition - is there benefit from repeating Open Space on consecutive days?

In designing the conference on action research we created balance between what the organizers were offering in the form of pre-designed interactive workshops and what participants were invited to offer in the form of self-organized breakout sessions during Open Space. Open Space accounted

<sup>4</sup> The term 'law of mobility' accounts for people of varying physical abilities

for about half of the duration of the conference. We decided to include time for Open Space in the afternoons after workshops were held in the mornings to get the creative juices of participants flowing. Holding Open Space in the afternoons also created the opportunity to dwell more on the morning workshops if participants so wished, by debriefing, or by taking the learning deeper. For example, one participant was inspired by a workshop about narrative to convene an Open Space session on the question, “How can we use narrative to catalyze change?” We repeated Open Space on two consecutive days to allow a chance for more reserved participants to engage on the second day after gaining more familiarity with the conference setting and the people present.

### Invoke responsibility and accountability

Open Space Technology is a loosely structured method for organizing work sessions, yet it is not total anarchy. Discipline and accountability are still necessary but the locus of both shifts from the conference organizers to the participants themselves. Conference organizers remain responsible for setting up OST and inviting participants to take part. Organizers need to be fully present yet totally invisible: “An OST facilitator holds space open like trusses keep a roof perched on top of the walls. Without the trusses the room collapses. Without the conscious act of holding it open, space closes.”<sup>5</sup>

Organizers must invoke responsibility and accountability in framing the OST session. Participants who do not wish to take part in any of the work sessions are free not to. Yet the Open Space portion of a conference offers the opportunity to take responsibility for the pressing issues that participants are grappling with, which may not have been discussed or discussed enough in the more structured portions of the program.

In framing the Open Space session in our conference on action research we set the expectation for responsible action by stating that this is the opportunity for participants to make an offering, rather than demand, wait for, or expect an offering from somebody else. Another tip is to send a conference agenda in advance that shows the Open Space blocks and includes a short description of OST. This primes participants to self-organize and claim responsibility for the issues that matter most even before attending the conference.



### Provide a light structure for self-organizing

OST requires a light structure to work effectively. By structure we mean setting up a process for inviting session conveners, signing up of participants, and breaking out into work sessions.

One way to do that is to post a roll of paper on the wall that notes the designated time(s) for the Open Space session(s). The various rooms and locations available for breakout sessions are listed separately. Participants interested in convening a work session are invited to note the title of their session on a large (A4 size) Post-It note, say a few words about the session they are convening, write a location on the Post-It note, and stick it on the large poster for others to sign up.

5 <http://www.openspaceworld.org/cgi/wiki.cgi?OpenSpaceExplanations> by Michael Herman

Much negotiation usually happens at this point as conveners with similar ideas might decide to merge their sessions, others may propose sessions in pairs or in teams, etc. Sessions can take place around key questions a convener raises, sharing of experiences and stories, calls to action, calls for support on a certain challenge, invitations to help with a certain task or project at hand, a training of sorts, or any kind of contribution. One of the sessions in the conference on action research was an invitation to debrief about a morning workshop that discussed an action research methodology.

Work sessions had multiple formats at the conference. Some took the form of people meeting in a room to discuss an issue or reflect on an experience, whereas others were less conventional. Some invoked the rational mindset, while others drew on more spiritual or representational forms of knowing. As examples, one group decided to take a meditative walk and inquire into nature, and another pursued an inquiry 'on the run' as participants jogged down a scenic road and discussed how they integrate action research in their organizations' everyday life. In those cases it is important for the convener to choose an exact location for the group to meet that may not be on the designated list of available locations.

It is also useful to note what the responsibilities of a convener are. In our conference we handed to each convener a one pager that outlined key responsibilities such as: make sure the session takes place, or notify of its cancellation; post a sign on the door with the name of the session; be present at the plenary to speak briefly about the session, etc.

### Invite sharing of the learning

In our experience with OST there is usually a wealth of knowledge created that warrants some dynamic for sharing the learning. There is also another very practical reason for this. The sessions proposed by conveners are usually so fascinating that often participants are torn between two or more that they wish to attend. Because sessions are often parallel, participants need to make a choice, but some form of sharing can enable people to find out what happened at those sessions they didn't end up participating in.

There are various ways of sharing. A basic practice is to ask the convener to make sure that some notes are taken at the session, highlighting key points. The convener can take the notes, or agree with participants on a note-taker. It helps to have a form that includes spaces for the title of the session, name of convener and participants, and notes that can be distributed to conveners before breaking out. These notes can then be posted on a wall for all to see.

Another form of sharing is to ask conveners or participants to offer some key highlights from their session at a plenary where the entire group reconvenes. Yet another method is to organize a World Café for sharing learning, as we did in our conference. World Café is an excellent tool for cross-pollinating ideas and perspectives. More information on this method can be found in the "Relevant RCLA Resources" section at the end of this Practice Note.



## Keep in Mind

- **Open Space still means work for the organizers:** That the process emerges in the moment does not mean that organizers and facilitators are off the hook for the duration of the Open Space session. They still need to provide the light structure discussed above that is so critical in making Open Space a success. Open Space is an excellent opportunity for organizers to attend work sessions and learn from conveners.
- **Participants will rise to the occasion:** Despite being its founder, OST is still an evolving mystery to Harrison Owen – it's what happens when people voluntarily organize something. Don't expect that participants would rather not engage or spend their time elsewhere. Participants will engage if they feel that their contributions are acknowledged and welcomed.
- **Debrief with the organizing team:** If you are unfamiliar with OST and decide to use it for the first time, it is critical that you debrief with the organizing team about the experience. It is helpful to reflect on the work sessions themselves and what discussions evolved there, but also about the process.

## MORE REFERENCES ON OPEN SPACE TECHNOLOGY

Owen, Harrison (2006) "Open Space Technology" in eds. Holman, P., Devane, T., and S. Cady *The Change Handbook: The Definitive Resource on Today's Best Methods for Engaging Whole Systems*. San Francisco: Berrett-Koehler Publishers.

Owen, Harrison (1997) *Open Space Technology: A User's Guide*. San Francisco: Berrett-Koehler Publishers.

<http://www.openingspace.net/index.shtml>

<http://www.openspaceworld.org>

## MORE ON THE RCLA/CARPP CONFERENCE ON ACTION RESEARCH

[www.wagner.nyu.edu/leadership/news/ActionResearchConference2008.php](http://www.wagner.nyu.edu/leadership/news/ActionResearchConference2008.php)

## RELEVANT RCLA RESOURCES

### Practice Note: Using World Café in Complex Conversations - October 2008

This Practice Note draws on RCLA's experience using World Café in a Race and Leadership symposium to examine the central roles social identity, particularly race and ethnicity, can play in the work of social change organizations. Facilitators can use this method to enable a variety of rich, in-depth discussions, letting coherent themes emerge without imposing their own interpretations.

<http://www.wagner.nyu.edu/leadership/reports/files/PracticeNoteWorldCafe1008.pdf>

### Practice Note: Designing Peer-to-Peer Learning Exchanges - April 2008

Peer-to-peer exchanges enable leaders to learn from each others' practice. Peers often share a deep understanding of each others' common challenges, experiences, and practices, and have developed valuable expertise. This Practice Note discusses some actions that can facilitate opportunities to deepen peer-to-peer learning and address the challenge of applying new learning "back home" in participants' own organizations.

[http://www.wagner.nyu.edu/leadership/practice\\_notes/RCLA%20Practice%20Note\\_Peer-to-Peer.pdf](http://www.wagner.nyu.edu/leadership/practice_notes/RCLA%20Practice%20Note_Peer-to-Peer.pdf)



The Research Center for Leadership in Action (RCLA) at New York University's Robert F. Wagner Graduate School of Public Service supports leadership that listens to many voices and serves as a resource for making systems and organizations effective, transparent, inclusive and fair. RCLA supports change agents tackling critical public challenges through rigorous, practice-grounded research and reflective processes that strengthen the theory and practice of leadership.

As part of this work, RCLA crafts and runs customized, experiential leadership programs that both expand individuals' skills and strengthen the organizations in which they work. RCLA develops structured convenings where leaders explore the complexity of the challenges they face and together advance their efforts to make change possible. As an academic center, RCLA conducts rigorous social science research, employing a variety of innovative and participatory methodologies to the issues of contemporary leadership.

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