

**Open Space**  
**Package for Participants**  
**of CDR 2016**  
**in Helsinki**

Lena Moll, OSCE

Jesus Guerrero Buitrago, OHCHR

## What is an Open Space Technology meeting?

The goal of an Open Space Technology meeting is to create time and space for people to engage deeply and creatively around issues of concern to them. The agenda is set by people with the power and desire to see it through, and typically, Open Space meetings often result in transformative experiences for the individuals and groups involved.

Open Space uses the self-organizing capacity and ingenuity of participants to reach learning and knowledge sharing objectives. It is a participatory approach to identifying relevant learning and knowledge sharing content and methods.

### *What is Open Space Technology best used for?*

Open Space Technology is **useful** in almost any context including strategic direction setting, envisioning the future, policy making, conflict resolution, morale building, consultation with stakeholders, community planning, collaboration and deep learning about issues and perspectives.

- It works for groups of any size (5 – 2000)
- Creates momentum and ownership of issues of interest
- For retreats and strategic meetings
- When everyone should be heard, no hierarchy is needed
- To support informal learning, networking, brainstorming and collaboration

### *When is Open Space not appropriate?*

Open Space is an **inappropriate** method when the outcome of the meeting is predetermined; when specific agenda items need to be addressed; or if sponsors are not prepared to change as a result of the meeting.

### *What outcomes can I expect from an Open Space Technology Meeting?*

Open Space Technology meetings can produce the following deliverables:

- • Every single issue that anybody cares about enough to raise will be "on the table".
- • All issues will receive as much discussion as people care to give them.
- • All discussion will be captured in a book, and made available to the participants.
- • All issues will be prioritized.
- • Related issues will be converged.
- • Responsibility will be taken for next step actions.

### *How long do Open Space meetings last?*

In meetings of **1.5 – 2.5 days** duration, all of these deliverables will be achieved with deep conversation and commitment to action.

However, it is possible to have shorter sessions (**1 hour to 1 day**). Meetings of a shorter duration will have many of the positive effects, but typically in meetings of a day or less, there is more emphasis on conversation and less on action.

### *What are the roles and responsibilities at an Open Space meeting?*

**Sponsor** Person who called for the meeting; they open the meeting and commit to taking the outcome of the discussion groups on board

<b>Facilitator</b>	Explains process, invites participants to come forward to set the agenda, convenes a closing circle at the end, and holds the space during the event.
<b>Participants</b>	Everyone participating in the meeting; no hierarchy, no obligation to participate in any particular discussion group;
<b>Discussion Convener</b>	Anyone who has put a discussion topic on the agenda is responsible for starting the discussion in a break out room at the assigned time
<b>Note Taker</b>	In each discussion group, one person will volunteer to record what is discussed and outcomes or recommendations, if any.

## Open Space Principles

1. **Whatever happens is the only thing that could have happened**, because participants drive the process.
2. **All those who attend are the right people**, since participants decide which session they want to join according to their interests and needs.
3. **Whenever the work starts is the right time and when it's over, it's over**, because creativity does not happen on a set schedule.
4. **The law of two feet** says that you should use your feet to move to another discussion session whenever you are not contributing or getting anything useful out of a discussion.

## Preparing for an Open Space meeting<sup>1</sup>

- Select a **focusing statement**, theme or question that inspires participants. It should be short, preferably stated as a question; stated in the 'language' of participants, and should cut to the heart of the matter. The scope of the statement will influence how much time will be required.
- Make sure that leadership is on board if they need to hear and act upon the outcome
- **Set up the room** and mark break-out rooms; allocate enough time for the group to fulfil its potential
- Place chairs in a circle (to underline the non-hierarchical nature of the meeting) and choose a blank wall for the agenda. Pens and paper ready for discussion topics.
- Prepare **templates** for the conveners/note takers indicating the title and participants of the session, discussion points and key recommendations; this makes recording easier.

## What does Open Space look like?

Essentially an Open Space meeting proceeds along the following process:

1. Group convenes in a circle and is welcomed by the sponsor. The facilitator provides an overview of the process and explains how it works.

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<sup>1</sup> You'll find plenty of detailed checklists and other information online, e.g. at <http://www.openspaceworld.com>

2. Facilitator invites people with issues of concern to come into the circle, write the issue on a piece of quarter size flip chart paper and announce it to the group. These people are "conveners."
3. The convener places their paper on the wall and chooses a time and a place to meet. This process continues until there are no more agenda items.
4. The group then breaks up and heads to the agenda wall, by now covered with a variety of sessions. Participants take note of the time and place for sessions they want to be involved in.
5. Dialogue sessions convene for the balance of the meeting. Recorders determined by each group capture the important points and post the reports on the news wall. All of these reports will be rolled into one document by the end of the meeting.
6. Following a closing or a break, the group might move into convergence, a process that takes the issues that have been discussed and attaches action plans to them to "get them out of the room."
7. The group then finishes the meeting with a closing circle where people are invited to share comments, insights, and commitments arising from the process.

### **Follow-up on the event**

- Prepare a **final report** after the Open Space that is shared with all participants.
- Discuss with the sponsor/leadership **follow-through with recommendations** from the meeting; This meeting is crucial because it initiates the follow-up to the event, ensuring a positive legacy of the event
- If it was just a gathering of ideas, make sure everyone has **access to ideas** developed and **contacts** of people involved in exercise are circulated.

## Useful Materials

### *Planning Checklist<sup>2</sup>*

<b>Open Space Technology Planning Checklist</b>	
<b>TASK</b>	<b>DONE</b>
<b>PRE-EVENT PLANNING</b>	
Hold pre-meeting with facilitator to set givens and pick theme	
Determine who to invite, set target number for attendance	
Set date	
Select space (make sure it's 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	
<b>LOGISTICS</b>	
Work with "Space" staff on set-up	
Provide an article or book on OST to staff	
Set up circle for main room, flexible breakout room configurations	
Get list of breakout room names (if using), maps to rooms	

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<sup>2</sup> Based on a template originally designed by Peggy Holman

Plan meals (buffet; food that can be out for several hours)	
Arrange details with caterer (breakfast, lunch, dinner, breaks)	
Arrange for any special food needs	
Arrange for computers (about 5 per 100 people)	
1 printer	
Adequate power, tables for computers	
Software for compiling proceedings	
Arrange for wireless microphone, plus spare battery	
Get supplies	
Masking tape (1 roll per breakout room)	
Magic markers (x per breakout room, x for main circle)	
Flip charts (1 per breakout room, spare chart paper)	
Paper for Issues (quarter chart paper; more than # of people)	
Post-its (2 packs per breakout room)	
Any legal issues?	
Any union issues?	
Signage required?	
Travel Support (hotel rooms, cars, maps)	
Name tags and other welcome materials (journal, pen)	
Cover for proceedings	
Set date for debrief	
Arrange for copying proceedings	
Arrange for typing participant phone numbers, addresses for proceedings	

<b>DAY OF EVENT</b>	
Prep sponsor for doing opening and their role	
Have sponsor write proceedings cover page sometime during the event	
Set up registration table (sign, name tags, pens, list: names, phone #s, addresses)	
Set up message area, registration table, signage, computers, microphone	
Make time/room matrix, signs (law, principles, surprise, mission control, theme)	
Make circle, put supplies in break out rooms, circle	
<b>POST EVENT</b>	
Hold debrief	
Copy and distribute proceedings	
Write thank you's	
Any measurement activities?	

***Sample flow of a 2-hour session***

<b>Time</b>	<b>What</b>	<b>Detail</b>	<b>Who</b>	<b>Props needed</b>	<b>Where</b>
(5 mins)	Open session, explain purpose of session, state theme		Sponsor		Main room that holds all participants
(10 mins)	Facilitators explain process	<ul style="list-style-type: none"> <li>• “We have a theme, we have a time slot, but we don’t know yet what will happen in the next 90 minutes”</li> <li>• “Participants will determine the</li> </ul>	Facilitator	Posters on the wall (to explain the principles of this session)	Main room

Time	What	Detail	Who	Props needed	Where
		<p>agenda”</p> <ul style="list-style-type: none"> <li>• Explain “rules” for the session</li> <li>• Explain process of setting agenda</li> <li>• Explain responsibility of person putting forward a discussion topic</li> <li>• Explain role of facilitators</li> <li>• Invite participants to identify some issue or opportunity related to the theme</li> </ul>			
(10 mins)	<p>Participants form the agenda for coming 60 minutes</p> <p>(by identifying issues for discussion in the dialogue sessions )</p>	<ul style="list-style-type: none"> <li>• Whoever feels inspired comes forward, writes topic on sticky note and reads it out loud</li> <li>• Facilitators will then arrange all discussion groups on the agenda matrix</li> </ul>	All participants willing to start a discussion, facilitators	Big sticky notes, markers, big pin board that serves as the agenda; sheets for everyone to copy down agenda, hand-held microphone to pass around	Main room, by the pin board
(5 mins)	Participants create their individual agenda	<ul style="list-style-type: none"> <li>• Participants copy into their personal “agenda matrix” the sessions they are interested in attending in the coming time</li> </ul>	All participants		
(10 mins)	Change rooms	People walk to the first discussion group they chose	All participants move	Possibly have coffee/ refreshments ready, so that people can take one on the way	Break-out rooms



Time	What	Detail	Who	Props needed	Where
(30 mins)	Discussion group I	<ul style="list-style-type: none"> <li>• <b>Discussion leaders</b> start discussion</li> <li>• <b>Note-takers</b> fill in sheet to capture main discussion points and outcome (if any)</li> <li>•</li> </ul>	Discussion leaders, note-takers		
(10 mins)	Change rooms	<ul style="list-style-type: none"> <li>• Facilitators and helpers collect sheets</li> <li>• People walk to the second discussion group they chose</li> </ul>	All participants	Possibly have coffee/ refreshments ready, so that people can take one on the way	
(30 mins)	Discussion group II	<ul style="list-style-type: none"> <li>• <b>Discussion leaders</b> start discussion</li> <li>• <b>Note-takers</b> fill in sheet to capture main discussion points and outcome (if any)</li> </ul>			
11.50 – 11.55 (5 mins)	Convene again in main room	People walk to the main room for closing			
11.55 – 12.00 (5 mins)	Closing the session De-brief in plenary	So what? “What are you taking away from this session?” – give people the opportunity to voice short comments / sound bites	Facilitators  Sponsor closes session	Flipchart	Main room
After the session	Follow-up	Sheets with main points and suggestions are multiplied and sent to everyone	Facilitators	Computer, scanner	Can be done from the office after return from event

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### ***Sample 1 day Open Space agenda***

**Note that all agenda items discussed in the dialogue sessions will relate to the overall theme.**

- 8:00 Coffee and tea available
- 8:30 Convene and set agenda
- Sponsors welcome participants and explain reason for meeting
- Facilitator explains process
- Participants identify issues for discussion in the dialogue sessions
- 9:30 Dialogue session A
- 11:00 Dialogue session B
- 12:30 Lunch
- 1:00 Dialogue session C
- 2:30 Dialogue session D
- 3:30 Closing circle
- 4:00 Adjourn

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### ***Sample 1.5 day Open Space agenda***

**Note that all agenda items discussed in the dialogue sessions will relate to the overall theme.**

#### **Day 1**

- 8:00 Coffee and tea available
  - 8:30 Convene and set agenda
  - 9:30 Dialogue session A
  - 11:00 Dialogue session B
  - 12:30 Lunch
  - 1:00 Dialogue session D
  - 2:30 Dialogue session E
  - 4:00 Close for the day
- Dialogue session reports are completed and copied overnight

#### **Day 2**

- 8:30 Reconvene for convergence and action planning exercise

	Participants review dialogue session reports
	Participants identify priority issues for action planning
	Convenors propose areas for immediate action
9:30	Action planning
	Participants reconvene in groups to develop action plans
10:30	Closing circle
	During the closing, action planning reports are copied so participants can take them home.
11:00	Meeting adjourned

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## Resources

- You can find lots of material on Harrison Owen’s webpage, including a quick guide to open space [http://www.openspaceworld.com/users\\_guide.htm](http://www.openspaceworld.com/users_guide.htm) ; this is basically the short version of his book “Open Space Technology – A User’s Guide” (ISBN 978-1-57675-476-4)
- A collection of training and facilitation methods put together by OHCHR; on pages 50 – 53 the Open Space method is explained. [slitoolkit.ohchr.org/data/downloads/OHCHR-KM.pdf](http://slitoolkit.ohchr.org/data/downloads/OHCHR-KM.pdf)