



## AFTER THE DANCE WITH CREATIVE OPEN SPACE

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In *The Handbook of Large Group Methods* (Alban and Bunker, Wiley, 2006), Glenda Eoyang and Kristine Quade have written a chapter, "After the Dance," which relates the principles of Human Systems Dynamics to large group interventions including Open Space Technology. The following article describes the success of a non-profit association to not only create and experience Open Space, but also, to continue deliberately self-organizing and creating desired outcomes after the event with the use of two HSD concepts: the Landscape Diagram and Simple Rules.

### BACKGROUND

Open Space Technology, originated with Harrison Owen and friends in the early 1980's and has self-organized itself all over the world ever since. Deceptively simple, it produces remarkable results in record time. The criteria for using Open Space include: high levels of complexity, diversity, potential for conflict, and time pressure. It is often categorized as a large-group intervention but works well with any size human system from 5 to 1200 who are experiencing the above criteria.

The event focuses on a question, such as "What are the issues and opportunities around creating the organization or community of your dreams?" The promise being that any issue or opportunity may be raised, but participants must truly care about it and take responsibility for dialoguing about it with others who share that passion.

During the event the "Law of Two Feet" guides the process of self-organization. The law states that "if you find yourself neither learning nor contributing to one of the concurrent sessions, use your two feet (or the equivalent) and go somewhere else."

From then on, self-management and self-organization flourish with no one ostensibly in charge, not even the facilitator who is almost invisible but who is holding the space open so that no one person takes control of or speaks for the group.

More details about facilitating the process can be found in Harrison Owen's *Open Space Technology – A User's Guide* 2<sup>nd</sup> edition (Berrett-Koehler, 1997).

Outcomes include the emergence of collective leadership, collaborative visions, self-directed work teams, heart-felt community, serious learning, playfulness, appropriate structures and control resulting in inspirational performance and increased productivity.

In short, Open Space Technology sets the conditions very simply for a complex system to adapt. As Margaret J. Wheatley points out in *Finding Our Way* (Berrett-Koehler, 2005) "Systems contain their own solutions and to find these solutions, the system needs to connect to more of itself." She goes on to point out that people only support what they get to create. Both of these happen quickly and passionately in Open Space. The potential for conflict and the differences that make a difference transform into a ground for creative collaborations when given enough "space" to do so.

However, without some understanding of the process of self-organization, it can be a challenge to deliberately continue implementation of results and continued self-organization "after the dance" of the event.

In the following case study of a non-profit association, using two concepts from Human Systems Dynamics, the Landscape Diagram and Simple Rules, participants were able to distinguish where they were as an organization and how they wanted to hold each other accountable in the future. They were able to "dance" across their organizational landscape and to continue to successfully adapt to their changing environment.

## **CASE STUDY: CREATIVE OPEN SPACE FOR A NON-PROFIT ASSOCIATION**

### **CASE STUDY BACKGROUND**

In May of 2005, the President of a professional non-profit association for the state of New Jersey called to say they needed some help. The chapter's Board of 30 members had just finished a re-affiliation process focused on policies and procedures mandated from the national association, and they were "burnt out." She also felt that during her tenure, there was very little sharing of information. Thus, her goal was to "**re-energize them and tie everything together around the policies and procedures as well as improve communication.**" She was also concerned that very few Board members were willing to attend a full-day retreat scheduled for July. She was familiar with **Open Space Technology** and thought it might create some needed enthusiasm.

The challenges were to provide them with an:

- 1) understanding of where they had been as an organization,
- 2) experience of where they could go, and
- 3) ability to see the value of moving back and forth across the organizational landscape.

### **DESIRED OUTCOMES**

Specifically, the outcomes for the retreat included the following.

- Renewed vision
- Excitement
- Honor for the national re-affiliation commitment and hard work
- Awareness of the changing landscape of their profession

- Identification of their needs to perform their volunteer roles
- Increased participation
- Improved communication internally and with statewide chapters
- Fun

## APPROACH

The design for the day included the following four main components focused on where they had been and where they could go.

- 1) Understanding the concept of and movement around an **organizational landscape**
- 2) Experiencing and valuing the process of **self-organization (using Open Space)**
- 3) Establishing “**simple rules**” for how they want to behave together when they are self-organizing and how those rules **complement the policies and procedures**
- 4) Generating some creative “**next steps**” which they really care about and grounding those steps in **implementation criteria**

## UNDERSTANDING THE ORGANIZATIONAL LANDSCAPE

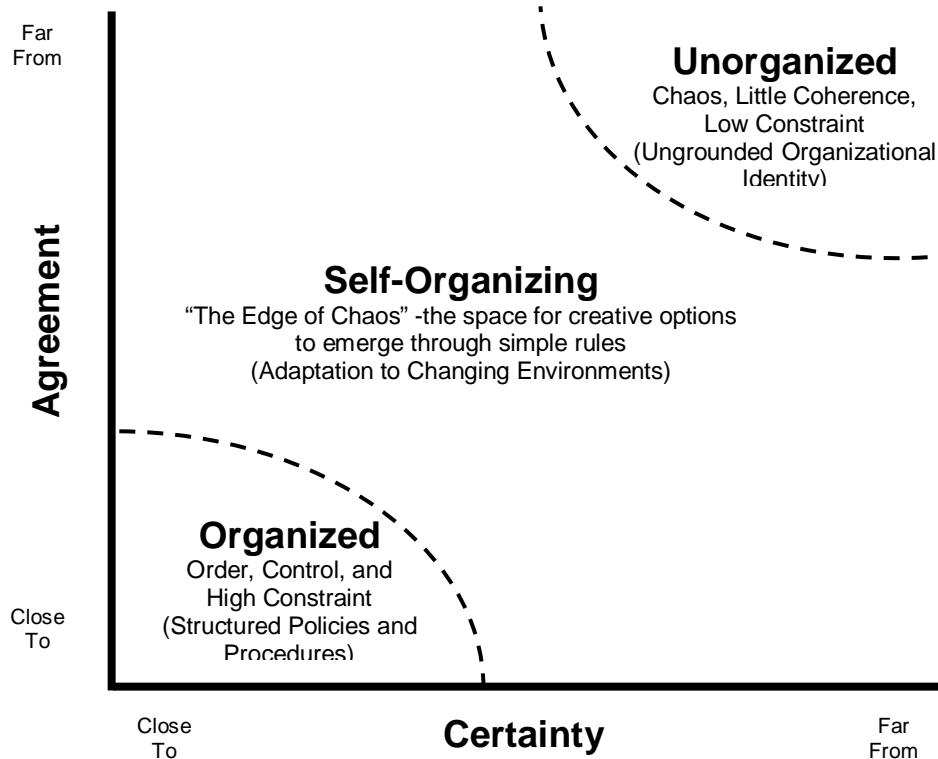
Sharing the diagram below, the group was able to see how their time-intensive work on the policies and procedures would keep them in the **organized** lower left of the organizational landscape where structure, order, and control predominate. They could see the value to the Association, especially since the organization’s national affiliation depended on it. That place, however, is not an exciting place to work, and staying there too long can lead to burn out. The members of this organization were well aware of this danger.

At the opposite, upper right corner, or **unorganized** state, the members are far from agreement and far from certainty. Spending too much time here can result in loss of organizational identity and frustration for the members who are unable to see any coherent patterns in the chaos.

The middle space, however, is the space of **self-organization** where the members can adapt to changing environments with the emergence of creative options. By identifying and using the **implementation criteria** these emerging options can be **coherent** with the organizational purpose and resources.

After acknowledging their own hard work in the lower left, this group was ready to experience and value a different way of being together. They were eager to experience the next four hours of **Open Space**.

# Organizational Landscape



## EXPERIENCING AND VALUING SELF-ORGANIZATION

The theme for the concurrent sessions during the four hours of **Open Space** was "**Creating the New Jersey Association of Our Dreams.**" This context was deliberately broad, positive, exciting, and concise, and it produced eleven concurrent sessions around issues they truly cared about. A sampling of **identified issues** included the following.

- Communication among chapters, leaders, and members
- Develop plan to support and mentor local affiliates for continuity and communication
- Positive public relations and creating a "sound bite" for the Association
- Making our organization a strong and viable presence in the field
- Communicating with legislators
- Supporting quality initiatives in the state
- Understanding our professional landscape and membership
- Making meetings more "user friendly" to encourage state-wide attendance

They were so engaged in these conversations, it was difficult to get them to reconvene as a whole group, so that we could proceed to “**simple rules.**”

#### ESTABLISHING “SIMPLE RULES”

Using the organizational landscape diagram, they were able to understand the value of structured policies and procedures to guide behavior in the lower left of the landscape. The experience of **self-organization**, however, enabled them to see that there was no way to know what might emerge. Specific policies and procedures could not be codified ahead of time. **For this middle space, “simple rules” would guide their desired patterns of behavior to adapt to the many possibilities and surprises which could arise.**

“**Simple rules**” are how nature organizes. They are a guide for everyone’s behavior no matter what comes up, and they provide sustainability in an emergent world. They create the culture of the organization and lead to cohesive actions. They can be used for evaluation of performance standards and decisions. Criteria for powerful “**simple rules**” include:

- Clear and simple
- General, not specific
- Start with an action verb
- Always written in the positive (not the negative)
- Not too many (4-8)

By establishing “**simple rules**” participants were able to identify the patterns of behavior that they all wanted to see as the Association adapts to future challenges. They brainstormed a long list and narrowed them down to the following.

- Create a safe and open environment.
- Stay focused.
- Respect each other.
- Build supportive relationships.
- Acknowledge others’ opinions and feelings.
- Share information.
- Appreciate everyone’s efforts.

#### **NEXT STEPS**

Using three basic criteria for implementation of the “**next steps,**” the group developed action plans for those steps they really cared about. They identified nine steps, along with the people who wanted to work on them and dates for the first meeting of each group. They also agreed to email Board members who had not been able to attend the retreat, so that they could join in on any of these meetings.

The implementation criteria were:

- 1) How does this step benefit the Association?
- 2) What resources do we need?
- 3) Whose approval is required?

## **BUSINESS RESULTS**

These active Board members attended the retreat expecting a heavily facilitated day focused on reviewing the newly revised policies and procedures manual. They were pleased and proud of their work when the **desired outcomes were met by combining the self-organization of Open Space Technology, and concepts of complex adaptive systems: the organizational landscape and “simple rules.”**

Not only were all of the desired outcomes listed above met, but most importantly, they have the experience of continuing their ability

- **to dance around the landscape very deliberately in order to maximize organizational effectiveness, and**
- **to hold each other accountable with “simple rules.”**

Reflections at the end of the day showed how much they valued the commitment, creativity, excitement, productivity, collaboration, and optimism as they moved forward as a state Association and as they take the concepts back to their local chapters.

## **LEARNINGS**

- 1) Clarifying expectations in the invitation by saying “Please note: This is not business or facilitation as usual!” set the stage to do something different.
- 2) Honoring them where they are is a key to taking them to a new place.
- 3) Creating a context for understanding self-organization is a valuable framework.
- 4) Having been “burnt out” enhanced the experience of self-organization.
- 5) Trusting emergence as a facilitator is a powerful model for participants.

## **FOLLOW-UP: A SECOND RETREAT**

Another retreat was scheduled six months “after the dance” to include more board members and continue the deliberate process of self-organization. The next question was “Shaping Our Future: What Are the Critical Issues and Opportunities for Our Membership?”

*After the event the Association’s President commented:*

*If we had been graded, we would have received an A+ for self-organizing! Within less than an hour, we had generated and consolidated 26 issues which we cared about and we were off and running. At the end of the four hours of Open Space, we reviewed the concurrent session notes and identified seven Critical Issues as well as those willing to move those issues forward and a communicator for each one.*

The President-elect who participated in both events declared she was “rejuvenated, recharged, and refocused.” Without further facilitation the Association is continuing to implement and create next steps and are using them in their strategic planning.

Reflections from the second retreat included comments about the event and beyond:

- ❖ *Inspiring and informational.*
- ❖ *This was life changing.*
- ❖ *With honest exchanges we are working on some meaningful issues.*
- ❖ *I loved the free-flow of groupings, networking, and synergy.*
- ❖ *Let's keep this going and not lose the momentum.*
- ❖ *It was empowering and I am committed to the rebuilding of the organization.*
- ❖ *I was a naysayer, but I do believe that this organization can carry out the good ideas that are brought forward in these sessions in spite of past history.*
  
- ❖ *How amazing that we can create our agenda together and keep the groups moving forward!*
- ❖ *Now we have powerful tools plus everyone is eager to go to the next steps.*

## **CONCLUSION**

Open Space Technology provides an immediate and deliberate experience of self-organization with effective and efficient results. However, most organizations have been designed to function in the more organized lower left and, not surprisingly, are apt to return there after the event.

The Landscape Diagram provides a framework for participants to distinguish their experience in the middle space of self-organization so that they can deliberately return there in the future. It also allows them to see the value of navigating the entire landscape and how each zone plays a vital part in the success of the organization.

While predefined policies and procedures apply well to the organized lower left of the landscape, only generalized Simple Rules will enable a complex system to self-organize and creatively adapt to change.

Awareness of these concepts (the Landscape Diagram and Simple Rules) contributes to the organization's ability to continue deliberate self-organization “after the dance.”

For more information on Open Space Technology and/or the organizational landscape, and simple rules you can refer to:

Expanding Our Now: The Story of Open Space Technology by Harrison Owen, Berrett-Koehler, Publishers, Inc., San Francisco, CA, 1997.

Facilitating Organization Change: Lessons from Complexity Science by Edwin E. Olson and Glenda H. Eoyang, Jossey-Bass/Pfeiffer, John Wiley & Sons, Inc., San Francisco, CA, 2001.