Perceived Benefits of an Open Space Event in a Protestant Church

By

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Abstract

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INTRODUCTION

An American manufacturing business desired to involve employees in creating a vision for the company's future (Daniel, 1994). AT&T needed to urgently redesign their Olympic Pavilion to take advantage of a more favorable location that had become available in the Global Village. The Italian Foreign Ministry and the Education for Life foundation gathered a group of Israelis and Palestinians in Rome to discuss the prospects for peace in the Middle East (Herman, 2003). The Girl Scouts of America wanted to involve 1600 delegates to a national convention in developing new approaches to organizational governance (Sanchez, 2005). In each case, the organizations used a technique called Open Space Technology to organize their gathering.

When demands for organizational change seem to be irresistible, when there is great urgency about the issues facing the organization, when wide participation in decision making is desired, and when the issues often appear to be so divisive or complex that discussion is impossible; a technique that permits people to work together quickly and effectively could be quite useful. Open Space Technology (OS) claims to be an effective tool to meet these challenges.

This research project will contribute to increased understanding of Open Space by examining the impact on a particular community of an Open Space conference as perceived by the participants in the conference. The goal of the study is to identify the perceived benefits of Open Space and discover any limitations of the technique that may become apparent during the research.

The Open Space Institute has identified the following reasons for encouraging further research into Open Space and its effectiveness:

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- ❖ There is a world-wide movement for evidence-based decision making by Non-Government Organizations and government.

- ❖ Interviews could deepen the impact on the interviewees reinforcing and further seeding and accelerating the use of Open Space

- ❖ It could support consultants in better understanding their client's world views

- ❖ It could be valuable for consultants to be a part of an international research project

- ❖ It could support marketing

- ❖ It could be publishable in a variety of media and journals

- ❖ It would provide us with usable quotes to share with clients

Our overall purpose is to increase the effectiveness of Open Space by deepening our understanding of it: how it is used, what it accomplishes, who is affected and how, as well as the underlying patterns that it teaches us (OSI, 2004).

WHAT IS OPEN SPACE TECHNOLOGY

Open Space is an approach to working with a group that uses a self organizing process to address an issue of interest to the group. Self organization in Open Space means that the participants create an agenda by proposing topics of interest to them and then attend small group discussions that they freely choose.

An Open Space event begins with the participants gathered in a circle. The facilitator reminds the group of their purpose in gathering and explains the process by which the group will create its agenda for the day. The facilitator explains that the Open Space process is governed by 4 principles and 1 law which were created or, as he prefers, discovered by Harrison Owen and

defined in *A Brief User's Guide to Open Space Technology, (N.D.) "*The principles are: whoever comes is the right people, whatever happens is the only thing that could have, whenever it starts is the right time, and when it is over, it is over" (p.5).

Owen (1997) describes the one law, "The Law of Two Feet, which might also be called the law of mobility for those who are differently abled, is pretty much what you might expect. If at any time during the time together, anyone finds that they are neither contributing nor learning, they should use their two feet and move" (Owen, 1997, p. 11).

Once the facilitator has explained the principles and the law, the participants are invited to come to the center of the circle, write their topic on which they wish to convene a discussion session on a piece of paper, and announce it to the group. After announcing the topic, the convener of the session goes to the wall known as "the market place" and selects a time and place for the session from a list of available time slots and locations. When all sessions are posted the participants are invited to go to the market place and select the sessions they wish to attend. An Open Space event may last a few hours or several days. At the end of the event there is a closing circle to reflect on the event and report individual reactions to the event.

Open Space has been used in a wide variety of settings including major corporations, religious institutions, government agencies, schools, and community groups in many countries.

The Open Space process described above is substantially different from the way meetings or conferences are usually conducted. A facilitator interested in securing a client's agreement to try such a different process needs to present more than an enthusiastic endorsement of the process. Clients are interested in the results that can be expected. They will want to know how an Open Space event will impact their organization and the individuals within the organization. This research will provide an example of the impact of one Open Space event that they might

find useful in determining the applicability of Open Space to whatever issue they wish to address.

LITERATURE REVIEW

Open Space Practitioners "How to" Guides and Promotional Material

Research on the effectiveness or benefits of OS is limited. Owen (2007) comments that, "We all know on the strength of our experience that OST is fast, fun, effective, cheap, and easy to do. Of course we do not have a shred of scientific data to prove that and certainly not rigorously conducted research." The largest body of literature consists of descriptive "How To" manuals and anecdotal accounts by Open Space practitioners, participants and observers.

Owen (N.D.) named and defined the process and provided instructions on how to conduct an Open Space meeting. Hermann, Heft and others have adapted and expanded Owen's original instructions. There is an accessible body of knowledge describing how to plan and facilitate an Open Space event. These guides include anecdotal descriptions of past Open Space events and their results. Documents by different practitioners often cite the same events as examples of the results/benefits of Open Space events. Some of the stories which have become part of the culture/folklore of Open Space are:

- ❖ Cost savings and additional revenue from generation of new ideas at Rockport Shoes and Boeing.
- ❖ Rapid completion of complex group tasks such as the redesign of the AT&T pavilion at the Atlanta Olympic Global Village.
- ❖ Creation of dialogue in highly conflicted situations such as the Israeli/Palestinian conflict.

❖ Improving labor management relations at US West by resolving escalating

contract conflicts and avoiding a strike.

The descriptions of the events listed above in the various guides to Open Space tend to be brief paragraphs which while encouraging do not tell the reader much about the results achieved.

Open Space practitioners claim that OST always works but they define working in a way that is not tied to specific outcomes. The guarantee is that the group will discuss everything they desire to discuss and act on whatever they feel passion about. A closer look at the results of Open Space events is required to understand what OS offers to an organization.

Descriptions of OS Events

Anecdotal accounts of OS events that identify positive results of the events can also be found in a variety of publications. Some descriptions are simple accounts of events and their results. For example, Hall (2002) describes how the use of OS at a meeting of heating and air conditioning contractors resulted in the generation and sharing of ideas for business improvements in 12 areas of concern to the participants. He does not report on whether the participants found the ideas useful although it is possible that some of the participants changed practices in their independent businesses as a result of participation in the conference.

Likewise, Sanchez (2002) provides a brief description of two OS events that she led for the Arizona Cactus-Pine Girl Scout Council. The events resulted in nineteen action streams and the creation of six "revolutionary teams" that worked on a reorganization of the council. Sanchez and Haack (2006) subsequently facilitated an event for the national Girl Scout organization that used OS and other processes to explore new models of governance for the

organization. In this case, the primary outcome of the OS events was a list of action items and subsequent work on the action items.

The use of OS as a tool for generating public input in governmental planning processes is documented by Lightfoot, Pappas and Chait (2003). They describe the use of OS to obtain citizen input in the development of a state disability plan. The state Developmental Disabilities Council used a series of town meetings conducted using Open Space rather than traditional public hearings to obtain citizen input. The authors performed an analysis comparing the recommendations from the various town meetings and the content of the final three year plan and found that 90% of the plan reflected issues generated in the Open Space meetings. Open Space was found to generate a broad range of ideas in the early stages of plan development and resulted in emphasis in one significant area that would not have been included in the plan except for the information generated in the Open Space events. Their work describes the process and results in terms of impact on the final disability plan. They established that the process succeeded in getting new ideas into the State Plan but do not discuss whether the participants perceived the results as successful.

OS as a Research Tool

Some researchers have used OS as a tool to gather information about various research topics. For example, Calbreath (1996) describes using an Open Space event to create a safe forum for the discussion of complex and emotion-laden issues related to adoption. She facilitated a meeting that included birth mothers, adoptees, adoptive parents, and professionals in the adoption field. Her work is more focused on the issues related to adoption. Open Space was her selected tool to address these issues. She acknowledged that Open Space was successful in creating a safe environment in which each member of the adoption triad, who was willing, could

share their experiences. In this case, the result of participation in the event was increased personal insight for some participants.

Hahn (2006) used OS in conjunction with focus groups and other data gathering techniques in an action research project to improve alignment across ministry boundaries in a church in Canada. She used a 2 hour OS event to identify themes and action steps to create a cross-ministry training program (p. 44) Her work does not address the benefits of OS as other than an idea generating tool.

Studies of the Effectiveness of OS

Although there are limited formal studies of results of Open Space, the research that has been done has looked at OS from a variety of approaches. For example, Norris (2000) used a qualitative approach to investigate the value associated with Open Space events. His research was limited to the collection and analysis of data collected electronically over a 3 month period. The data included e-mail list server postings and articles. He coded the reported results in categories such as time frame (immediate, post event and potential), type of value (personal or Organizational), and System (management, leadership, vision, community). He also identified specific results and cost savings reported. The values identified were tabulated and linked to a number of different organizational models. Norris' work provides a list of potential values (benefits) that can be realized during and after an Open Space event as well as beginning to relate the values to organizational theory. His conclusions are that Open Space has the ability to remove or circumvent organizational barriers, empower individuals to develop new ways of working and communicating in an organization, and transform relationships within the organization.

Waterhouse (1996) evaluated the use of Open Space events to address youth violence by studying six regional Open Space events sponsored by religious leaders. All participants were invited to complete questionnaires designed to measure effectiveness of the Open Space event as perceived by the participants. The questionnaire used three different question formats, a 1-4 rating scale, "yes" and "no" responses, and open ended questions. Quantitative analysis of the questionnaire results indicated that Open Space was an effective vehicle for developing awareness of the issue, for developing solutions, creating a sense of commitment, and encouraging networking between people interested in the issue. Looking at a similar OS event using a qualitative approach could provide a richer, deeper understanding of the impact of participation in an Open Space event on the participants in a community setting.

McFee (2006) explored the question ,"How can an Open Space Technology process support residents of a small island community to come together and build a dialogue about our future" (p.48) She conducted an action research project that used Open Space to address community issues in a small community divided by disagreements over future development of the island. There had been a history of loud public disagreements in the community. She found that Open Space provided a safe forum for discussion of divisive issues. Her research was focused on the process of Open Space not necessarily on the results. She identified three themes related to how people created a safe environment for discussion:

❖ Developing and improving interpersonal communications,

❖ Building relationships, and

❖ Creating community. (p. 71)

She concluded, "The sense of respect and personal responsibility that was developed by and through the Open Space Technology process contributed largely to creating that opportunity

for people to understand each other. The fact that people knew each other to some degree, had taken part in the creation of the agenda, had been able to move around as they wished and participate to whatever degree they felt comfortable added value to their experience."(p.86).

Daniel (1994) used ethnographic methods to examine a large OS event in which all 375 employees of a company met in Open Space for two days to examine the company's future. In this case, Open Space was seen as a way to introduce the concept of cross function teams as well as an effort to change organizational culture in ways that would make the company more adaptable to a changing future. Daniel did detailed observation of the Open Space event and collected artifacts from the event. She also conducted 10 interviews whose subjects represented a cross section of the company. Her data led her to identify seven themes that described how OS encourages people to act. They were:"

1. Be energized, free, and open

2. Take risks and act with courage

3. Assume personal responsibility

4. Respect Others

5. Share information

6. Experience being in a community

7. Be optimistic towards the future" (p.67).

Daniel's focus was much more on what was happening within the Open Space than on the participant's perceptions of the benefits. One major benefit, the creation of a new product

that arose from the event was only briefly mentioned. Her detailed observations and analysis provide a useful description of what happens in an Open Space Event and may well link to the benefits perceived by the participants in the event that is the subject of this research.

Explorations of the Theoretical Basis for Open Space

Some scholars have examined Open Space to explain how it works in terms drawn from the science of complexity theory, economic theory, or organizational theory. Saam (2004) argues that OS can be understood as introducing elements of the market into an organization resulting in the maximum amount of idea generation. While this approach offers a model to better understand an Open Space event, it does not directly addresses identifying particular outcomes or benefits to an organization from an Open Space event which is the focus of this study.

The science of complexity has become a popular lens through which organizational phenomena can be viewed. Bastianello (2000) examined two organizations that had used OS events. Both organizations reported the OS provided profound learning experiences but one failed to thrive and, in fact, ceased to exist. Bastianello argues that the concept of complex adaptive systems provides a way to understand why an OS event might be viewed as successful but still fail to save the organization. For him, the answer to this question is found in variations in the complex adaptive systems processes in the organization. Organizational outcomes after an OS event are determined by the characteristics of the organization's adaptive systems. His work is a caution to OS practitioners who might be tempted to oversell OS as guaranteeing the success of the organization in the future. The ability of an organization to integrate the results of an OS event into its organizational structure and actions is affected by the ability of the organization to function as an adaptive system. An Open Space event doesn't guarantee that the

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organization can change its adaptive processes to make effective use of the ideas and energy generated by the event.

This principle is confirmed in my own personal experience in facilitating an OS event which was well received by the participants, appreciated by the organization, and had a minimal impact on the organizations actions. This study will seek to assess whether the participants perceive a willingness to act on the ideas arising from the OS event. If the proposed event generates only short term results then a serious question arises about whether OS is useful?

Open Space and Other Large Group Interventions

Open Space is not the only method that claims to be useful for involving the whole organization in creating systemic change. Bunker and Alban (2006) identify eight large methods in current use. Several of these methods, such as GE's Work Out, are limited by their focus on work or process design within an organization. They identify six methods that are being used for creating a vision and plan for the future of an organization or changing that future. They are:

- ❖ The Search Conference
- ❖ Future Search
- ❖ Whole-Scale Change
- ❖ ICA Strategic Planning Process
- ❖ Open Space Technology
- ❖ Appreciative Inquiry Summit

Whole-Scale Change, also know as Real Time Strategic Change, was developed by Kathie Dannemiller based on her experience working with Ford Motor Company. Bunker and Alban (2006) note that unlike other large scale methods, Whole-Scale Change events are created

for each client engagement. Whole-Scale Change doesn't play in the same market as the other large group methods because it is has been used primarily in large business organizations and it often takes place over extended time frames of up to a year.

The Institute of Cultural Affairs (ICA) Technology of Participation (ToP) Strategic Planning Process is highly structured. Groups that can be as large as 25 or 30, go through a series of workshops over two to three days to create a practical vision, identify underlying contradictions or barriers to achieving the vision, create innovative actions and strategies to achieve the vision, and develop implementation plans.

The ICA technique was created for smaller groups but can be extended by using multiple groups each with its own facilitator (Holman, Devane, and Cady, 2006). The process is different enough from the other group methods that again it doesn't play in the same market as the remaining methods. ICA methods are powerful tools for achieving participation in group decision making. I have attended several ICA training classes and have probably used ICA techniques more than any other facilitation method in my own work. I believe, based on my experience, that the method is significantly different from methods like Open Space and Future Search because the facilitator plays a more directive role.

Bunker and Alban (2006) have documented the growth of large group methods and collected multiple case studies of the various methods. They identified some common characteristics of the methods. These were: inclusion of stakeholders, engagement of multiple perspectives through interactive activities, opportunity to influence the outcomes of the meeting and a search for common ground. The methods do not seek to address conflicts by using conflict resolution techniques but instead seek to emphasize areas of agreement rather than disagreement.

Table 1 below summarizes the primary large group intervention methods and highlights differences and similarities between the methods.

TABLE 1   COMPARISON OF LARGE GROUP INTERVENTIONS   SOURCE: BUNKER AND ALBAN (2006)

	Open Space Technology	Search Conference	Future Search Conference	ToP® Strategic Planning	Appreciative Inquiry Summit	Whole-Scale Change
Time Required	1 ½ to 2 ½ days	2 ½ days Minimum	2 ½ days	2-7 days	2 - 4 days	2-3 days + follow up events for up to 1 year
Number of Participants	Limited only by space available	35-40+ Larger Groups use multiple simultaneous conferences	60-80 ideally 64 Multiple simultaneous sessions used for larger groups	50-200 Multiple simultaneous sessions used for larger groups	Limited only by space available	100-2400
Who Attends	Invite everyone with an interest in theme	Representative stakeholders from within system	Selection of representative stakeholders	Key stakeholders	All interested stakeholders or selected population	Stakeholders including customers/suppliers Outside experts brought in as needed
Structure	Most open - Agenda determined by participants who self-select group sessions they will attend	Set Format - Facilitator leads groups through steps Groups do the work.	Set Format - Facilitator leads groups through steps Self-managed groups do the work.	Very structured- Facilitator leads work.	Semi-structured - Facilitator explains steps. Groups do the work.	Planning committee & consultants design highly structured events Work done in both whole community and self-managed small groups
Pre- Meeting work	1-2 planning meetings to develop Theme	2 or 3 planning meetings to develop Theme	2 or 3 planning meetings to develop Theme and select participants	2-3 Planning meetings to design event and develop: focus question	Extensive pre-planning/design. 2-3 day planning meeting to develop a "powerful question " Pre-meeting Interviews	Extensive pre-planning
Key Ideas	Passion and responsibility Facilitator "holds space"	Environmental scan History-Present-Future Search for common ground 1/3 of total time spent in Action Planning	Recalling the past Appreciating the Present Moving to Action Search for Common Ground	Participation and consensus Focus Question Practical Vision Underlying Contradictions Strategic direction	Positive approach – find out what we are doing well and do more of it 4 Stages/steps Discovery Dream Design Delivery	Common data base Daily feedback from participants

The Search Conference, Future Search Conference, and Appreciative inquiry have a number of common elements with Open Space and are attractive to many of the same clients. Research into the impacts of these alternate approaches to large group interventions might have relevance for this research.

Manning and Binzagr (2001) reviewed a number of large group interventions including Open Space, Future Search, Search Conference, and Real Time Strategic Change. They conclude that one of the common elements that various interventions share is a series of common values and assumptions about the nature of organizations and change. Those values and assumptions are:

1. Organizations are seen as "Whole Systems".

2. Viewing organizations as wholes system requires creations of dialogue among all participants.

3. Organizations do not exist, but organizing processes do.

4. What we perceive as our present organizational reality becomes the organization that is created.

5. Individuals within organizations have the capacity to self-organize and redefine their reality.

6. Humanity shares a set of universal values that are inherently "good" and these values ultimately influence voluntary collective action. (pp. 278-285

These shared assumptions and values do not predict particular impacts from OS or other large group interactions. However, they might provide a way for understanding how OS is able to have an impact on an organization and the people in it.

Finnerty (2000) looked at several large group interventions that used different methods. She observed a Future Search and an Open Space event and interviewed participants in three Search Conferences and another Future Search. She chose to look at multiple intervention approaches because she noted some competition between the various methods. She found two themes useful in analyzing the events studied. First, an event can be seen as a unique system. The second set of themes addresses relationships within the event. She argues taken together these themes show large group interventions as culture creating events. Each event creates a new culture in the organization for the duration of the event. The participants in her study consistently describe their experience of the events in a similar manner. They describe feelings of inclusion, connection and being heard and validated that were common to all of the events she studied. Her focus was on how participants use large group events to collaboratively create their future. Her research does not shed light on the differences between methods but rather identifies common elements between the approaches.

There is much cross-fertilization between practitioners of Search Conferences, Future Search, Appreciative Inquiry (AI), and Open Space technology. Weisbord and Janoff acknowledge the Search Conference as a predecessor of Future Search. (P.65)

Sanchez and Haack, 2005, (May 31) describe combining Appreciative Inquiry, World Cafe, and Open Space approaches to their work with the Girl Scouts.

Lent (1999) describes using a series of brief Open Space events to lead up to a Future Search Conference.

I have participated in several Future Search Conferences as a documenter, co-facilitated one Appreciative Inquiry Summit, and participated in or led seven Open Space events. I noted that the structure and activities in an Appreciative Inquiry Summit and a Future Search

Conference have many similarities. Ludema, Whitney, Mohr, and Griffin (2003) acknowledge that the design of an AI Summit builds on the experiences of other large scale change initiatives. (p. 20)

Appreciative Inquiry has also influenced the approach of virtually all large group intervention even where the methods specific to an Appreciative Inquiry Summit are not used, you will often find practitioners of other techniques using an "appreciative approach". Ludema, Whitney, Mohr, and Griffin (2003) explain the core principle of AI is that positive change is best achieved by focusing on what has worked not what has failed. (p. 23)

One significant structural difference between a Future Search and an AI Summit is the approach to setting the stage for creating a new vision of the future. An AI Summit uses a series pre-summit appreciative interviews to create the starting point for designing a new future in AI. Future Search uses a process of remembering the past and examining the current reality to prepare the group to describe the future they want. Both Future Search and AI lead the participants through a series of exercises that create common agreement about actions to be taken to create the desired future. Both use structured processes which Owen would probably believe are unnecessary to achieve the result desired. Owen (2005) reports telling Weisbord, "Marv, I think you are working too hard."(n.p.).

The simplicity of Open Space Technology separates it from other large scale group processes. Research on other processes can support their claims for success and identify conditions and practices that lead to successful outcomes, but as Owen would say practitioners of these other approaches may just be working too hard to achieve their results.

This study seeks to discover and describe the results from an Open Space event as seen by the sponsors and participants.

PURPOSE OF STUDY

Although the available literature has identified some possible outcomes from OS events, questions still remain about the impact of Open Space technology on organizations. Do individuals experience a significant personal impact from participation in an OS event? Does personal impact lead to identifiable changes in the organization or its actions?

This study supports the Open Space Institute's goals cited in the open paragraphs of this report by adding to the body of knowledge about Open Space. It provides both OS practitioners and potential clients with a better understanding of the benefits can be expected in Open Space event in a protestant church.

METHODOLOGY

Research Method Overview

Since the purpose of this study is to examine the perceived benefits of an Open Space event in a particular organization, the approach to the research must allow the researcher access to the perceptions of the individuals in the organization. This research is working at the intersection of the personal and the organizational culture. The method chosen to approach this topic was ethnographic interviews. "Ethnography is a social science research method. It relies heavily on up-close, personal experience and possible participation, not just observation …" (Genzuk, 2004, p.1). My role as the facilitator made me both a participant and an observer of the event. The relatively long planning period and multiple discussions with church leaders provided the longer term connection with the organization that is often associated with ethnographic research. While my observations about behavior during the event will shed some light on my research question, the focus of my study is on the perceptions of the participant. They can best describe their perceptions of the impact of the event on their personal lives as well as identifying

the impact of the event on the church. Ethnography is an appropriate approach for exploring the research question. "Ethnographic research is a special methodology that suggests we learn about people's lives (or aspects of their lives) from their own perspective and from within the context of their own lived experience." (O'Reilly, 2004, p. 84)

This research is focused on an Open Space event sponsored by an independent protestant church located in East Oakland. I facilitated an event to address interpersonal issues in the church that the Pastor and staff believed may be hindering the growth of the church.   The theme of the event was "Discovering How to Strengthen the Bonds of Fellowship". The event occurred on June 9, 2007 and lasted from 9 AM to 5 PM.   The schedule and topic for the meeting were developed through multiple conversations with the pastor and church staff.

The formation of discussion groups and the flow of individuals between groups during each session was observed and documented. The marketplace and news walls were documented with digital photography and the results of each session captured in notes transcribed by the church staff.

The qualitative research design consisted of a semi-structured interview processes in which the researcher will ask participants to answer a set of pre-defined questions along with possible follow-up and clarifying questions that arise as the information from the participants unfolds.

I initially planned to use a question set created by the Open Space Institute to promote research on Open Space. During the first interview, it became clear that the questions needed revision. The questions were edited to make them more direct and eliminate introductory language that was confusing or leading. For example, question 2 was changed from *"Open Space can have many practical and subtle impacts that ripple and resonate long after the event has*

ended. Tell me your stories of direct and indirect outcomes?" to *"Can you tell me about any*

direct or indirect results or outcomes, something that changed as a result of the event that you

may have noticed?" Questions 3 though 6 were also edited. The edited version of each question

is used as a heading in the results section of this report. The original and revised questions can be

found in Appendix B.

Participants were interviewed individually. The interviews were between 15 and 45

minutes in duration. The interviews were recorded in its entirety, with the permission of the

participant and were transcribed by a commercial transcription service. I reviewed the

transcriptions for accuracy. The tapes were retained to validate the transcription when additional

questions arose in the course of data analysis.

Invitation and Sample Selection

During the event I explained that, in addition to facilitating the event, I was conducting

research and invited participants to read a summary of the research proposal and volunteer to

participate as an interview subject. A copy of the invitation to participate in the research is found

in Appendix C.

Approximately 24 people participated in at least part of the Open Space event. The pastor

had expected attendance to be closer to 40 people. The research plan anticipated interviewing 8

to 10 of the participants. Interviews were conducted with the pastor and 5 other participants. The

interview participants included 4 men and two women. All but one of the participants held

positions of responsibility in the church. The interview participants did not reflected the make up

of the event participants in several ways. First, 5 of the 6 persons interviewed held positions of

responsibility in the church. They were either staff members or program leaders. A majority, but

not all, of the attendees were involved in formal or informal leadership roles. A few more women

participated in the event than men. The interview sample included one more man. Several youth representatives participated in the event but were not available for interviews. Multiple contacts were made to obtain broader interview participation.

The first interview took place August 1, 2007 and the final interview was completed in September 2007. All but one of the interviews took place at the church. The interview not conducted at the church was done at a coffee shop near the residence of the interviewee.

Confidentiality and Anonymity

All information given by study participants is confidential and individual contributions are anonymous. The data is stored on removable media and stored in a locked file cabinet. Digital recordings of the interviews were sent via e-mail to a third party transcriber. Each participant was identified on the recording by a participant code only.

The church is not identified by name in this report to further protect the anonymity of the participants.

Use of Human Subjects

Because this research involved human subjects, care was exercised to protect them from harm. There are two classes of subjects involved in this study. The first group is all of the participants in the OS event. OS is a generally benign process. The structure and principles of OS and the law of two feet permit the individual participants to protect themselves from discomfort. One of the primary roles of the facilitator in opening the space is to emphasize that the participants are free to do what they need to do to take care of them. This "permission giving" is a critical part of setting the stage for the event. The voluntary nature of participation and assurances of confidentiality were emphasized during the opening circle.

The second group of subjects will be those selected for data gathering. Human participants will be protected in accordance with the ethical standards taken from the APA Code of Conduct (1992).

Informed Consent

All participants who responded affirmatively to the invitation to be interviewed for the study were requested to sign the informed consent form. The consent form explained that participation in the study was voluntary and that participants were free to change their mind at any time, even after signing and submitting the consent form. The form confirmed that the information provided during participation in the study will be anonymous. All interview participants signed the consent form. A copy of the consent form is included in Appendix A.

The consent form also asked for permission to publish quotations from the interviews on the Open Space Institute website. Any information published on the website will be stripped or personal identifiers to preserve anonymity.

Debriefing Procedures

At the conclusion of the interview, individual participants were given the opportunity to debrief with the researcher, to ask questions or express any concerns they may have. The researcher responded to their questions and concerns at that time. Participants who wish to address any outstanding issues or questions regarding the interview or final report, will be invited to call or email the researcher directly to address their issues or questions. A summary of findings will be made available to them upon their request.

Participants were invited to contact the JFK University Project Advisor if they have questions or requests for additional information regarding this study and the interview process:

Analysis

The approach to data analysis was essentially looking at the data to discover categories or themes. The responses to each question were transferred to coding sheets. Similar responses were highlighted and categorized into themes. The themes emerging from the responses were summarized to capture the essence of each category and ask what light the data sheds on the research question. Coding of each interview was refined multiple times to connect related themes to provide a rich understanding of the participants' perceptions of the event and its benefits.

The themes identified specific impacts or benefits, such as: improved communications or generation of new programs. Impacts were categorized as organizational or personal and immediate or expected.

Researcher Bias

I am aware that I come to this project with a set of experiences, beliefs, and cultural and social values that affect the way I might approach the data developed in this project.

First, I have been trained as an Open Space facilitator. I am a regular participant in an informal group of facilitators that discuss Open Space and other processes in person and on-line. I have facilitated and participated in a number of Open Space events. I have a strong belief that Open Space is a useful technique in many situations.

My experience and training in OS, is somewhat balanced by training and experience with other forms of facilitation including Future Search, Techniques of Participation, and Appreciative Inquiry. I was exposed to a variety of other facilitation techniques during his graduate studies.

I strongly value methods that broaden participation in organizational decision making by including all members of the organization in the process. These values lead me to this area of studies. My understanding of organizational behavior is informed not only by my graduate studies in Organizational Psychology and Public Administration but also by over 28 years of work in the Federal bureaucracy and my early training and experience as a community organizer.

I am aware of these biases and will remain open to the data as it is presented. Bias awareness is a key element of the ethnographic methodology chosen for this study. The researcher will be alert to his own bias in presenting and analyzing the data. I will be particularly alert for data that illuminates limitations of Open Space as a facilitation method. I anticipate experiencing the joy of surprise as I discover unanticipated results of the OS event that I am studying.

Limitations

This research is limited in several ways. First, it is focused on a single OS event in a community setting. The event may turn out to be atypical. However, even an atypical event can be useful in illuminating the impact of OS on and organization by providing data for comparison to other events. Comparison of this event to other OS events or other large group interventions is not included in this research.

The data collection for this research was conducted 2-3 months after the event. This is a relatively short time after the event. As a result the research may miss long term impacts that had not materialized at the time the data is collected. Memories of the event and any immediate impacts may have faded.

One significant trend noted in the literature is that in many cases practitioners will combine elements of multiple methods to adapt to the perceived requirements of the client. In a

recent discussion on the Future Search Network list server, Beaulieu (2007) discussed using Open Space as a follow up to a Future Search. Sanchez and Haack (2005) combined Open Space with World Café at the Girl Scout national convention. Sanchez (2007) is currently offering a class on collaboration using OS, Appreciative Inquiry, and World Café. Still practitioners of OS often believe it to be distinctive. Owen states that his personal feeling is that the combination of open space with other methods reduces the power available in Open Space. (Owen, 2005, p.1) Bunker and Alban describe Open Space as having a"minimalist structure" compared to other methods. (p.17) The question as to whether the structural differences between the methods significantly affect the outcomes remains open. The focus of this research on the outcomes of a particular event, does not lend itself to directly addressing how differences in event structure affect the impact of the event on the organization. Additional case studies using similar methodology may eventually provide enough data to address the differences between methods and their relation to outcomes.

In spite of these limitations, the proposed research provides unique insight into the impact of the Open Space event using a qualitative methodology that has not yet been used to directly analyze an Open Space event. Additionally the event itself will provide the client with useful information, ideas and plans on which they can base their future efforts to impact their community.

RESULTS

This ethnographic research study is focused on identifying the perceived impacts of an Open Space Technology (OS) event held on June 9, 2007 for a protestant church in Oakland, CA. This study examined the impact on a particular community of an OS conference as perceived by the participants and sponsors of the conference. In addition, the study identified the

perceived benefits of OS and the limitations of the method during the research. The approach best suited to achieve these goals was ethnographic interviews. The interviews were supplemented by observations made during the event and a review of the session summary sheets competed for each session.

The interviews were transcribed. The transcribed interviews were then reviewed to identify themes, patterns or connections in the participants' perceptions of the impacts of the event. The themes discovered during the interviews are identified and described below. The themes are grouped by question in this section. Some themes emerged from responses to several different questions.

Question 1: Can you tell me a story about how the event has affected you or the Church?

This question elicited several responses about the participants' expectations concerning the event. Three of the six individuals interviewed described ways in which their experience with the event, did not match their expectations. Participant 1 said,"…I didn't know what to expect. So I – began thinking that …at the end, we'd have a lot of action items, things that we could do and tasks we could conquer." (P1) Another participant commented, "I would have expected by now, some of those suggestions to really have been kicked into full gear and there still remains some dragging." (P3)

Two participants were uncertain, even doubtful, about what the event would accomplish. Participant 5 was merely uncertain about what to expect and reported sitting quietly until the process was understood. "I didn't know what to expect and so, I just kind of sat and was quiet till I felt that I need to say something." (P5) Participant 6 was both skeptical and apprehensive about what would happen. "I was figuring they were going to come up with questions and stuff like that that they weren't … prepared to ask, or answer adequately…." (P6)

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Although each participant brought a different set of expectations and concerns to the event, all of the participants who discussed their expectations noted that they became more comfortable as the day unfolded.

Five of the interviewees gave examples of how participation in the event changed the attitudes and relationships among the participants. The event was focused on creating the bonds of fellowship within the church. Several of the subjects acknowledged that the sharing in the groups revealed people in a new light to each other. These revelations changed relationships and attitudes of people towards each other. Participant 1 said that the event "changed the way we perceive each other". Participant 3 reported, "I've been around the Ministry for about ten years, and never did I know some of the things that came out of that group I heard." Another person described how hearing people share their stories "…gave us the opportunity to really look at each other as just individuals and not just putting a label on them because of one thing that you may know about them." (P5)

Participant 5 reported that a discussion of accountability in one of the groups broadened her view of her personal accountability for work in the church.

A number of the individuals interviewed addressed the way the structure of the event encouraged participation. Two individuals reported that the ability of anyone to post a topic created energy. People were able to talk about what was important to them.. One participant noted, "… the way it was designed, you went to that group because of your interest and so you had your own self-motivating factor in there so you came with energy." (P4)   "…then they were the head of that subject in what they want to speak about." (P2) The idea that the structure of OS enabled the participants to communicate in new and different ways arose from answers to several of the questions.

As part of the ethnographic study, the facilitator observed a high level of energy and involvement of individuals in all of the groups. The participants appeared to be engaged based on their posture. Most individuals were leaning forward and appeared to be intently listening and contributing.

One group in particular did not break up at the end of a scheduled session and continued well into the next session. The structure of Open Space gives permission for groups to ignore the preset time boundaries if the participants feel that the group is doing something rewarding. Individuals can choose to stay with the group or move to another group. In this case, all members of this group stayed together for two sessions. This is the *Law of Two Feet* at work. In this case, the members of the group chose to stay because they felt that they were either learning from or contributing to the discussion.

Question 2: Can you tell me about any direct or indirect results or outcomes, something that changed as a result of the event?

The interviewees identified several personal and organizational results that may be attributed to the event.

First, there are some possible changes in the churches program that may be a direct result of the Open Space event. Participant 1 reported that "the ministry will focus – will have a huge emphasis on two areas: evangelism and discipleship." This new emphasis occurred after the Open Space event, but Participant 1 was unsure that new focus was a result of the event.

Participant 1 also reported that a new class on the Holy Spirit has been started. One of the groups proposed extensive study of the Holy Spirit but again Participant 1 was uncertain as to

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whether the class was a direct result of the Open Space event. Participant 4 did attribute the new classes to the Open Space event.

Participant 4 also noted that he had seen improvement in "working with the community, working with our council people, and the police department. That really has shown some improvement" (P4) He also pointed out, "The other was one particular [*group*] about relationships: the couples' relationship and the women's ministry. The coordinator was here for that and she's really stepped up."(P4) Participant 6 described a new leadership initiative that has used Open Space inspired techniques to organize its meetings:

> "I think Pastor took that format and started using it for the G12 initiative, our G12 initiative, so we formed ourselves into groups. People were invited to get into – we'd have five different topics. People were allowed to get in whatever group that they wanted to get into and move around just like you did, and we began to form ideas of how we could improve these five areas."

Second, several participants identified changes in behavior and attitudes resulting from the event. Participant 3 stated: "I see that the Church is more unified in terms of wanting to know each other more." Participant 5 commented, "It seems that all the people that attended, are starting to look at things in more than one way, they are starting to take accountability, you know to prepare themselves."

Participant 2 reported that he has become more accepting of others and that some members began confiding in each other more after the event. Participant 2 also linked the greater acceptance and openness towards each other to the structure of the event that treated everyone as equal. He said, "And then it wasn't a one-person party. Everybody had a chance to – an opportunity to express what some of his or her concerns were." (P2).

Participant 6 also saw the event as having a positive impact. He said, "… I think people just thought that they needed more input and that they wanted to be more a part of decisions and I think this is what helped them to do that. That was a very good starting point."

Question 3: Did anything surprise you about the event?

Participants 1 and 4, who were both involved in planning the event, were surprised and disappointed by the attendance which was less than the 35-40 people expected. Participant 3 said: "I had expected more because we had really talked about it and really had done our due diligence in as far as encouraging people to attend. Well, God has here who He actually wants here, anyway, so I just believe that the ones that were there are the ones that are the movers and the shakers that are going to get things done."

The most common surprises mentioned by the participants related to the structure of the event and the nature of the conversations that took place. These responses emphasized the idea that OS encouraged conversations in new and different ways.

Participant 1 commented: "I was amazed at the topics that came up from the group, and that just the process of writing a statement down or an issue on a piece of paper could create such conversation. That if that topic wasn't – had not been raised, you wouldn't know that person's viewpoint on that topic. So I was amazed at the simple process that could create such a large response and a kind of in depth response from so many people."

Participant 3 expressed a similar surprise. "… I wasn't really up for coming to the meeting, and I thought it would just be another training type of meeting and we'd just go home. But what surprised me was … what I heard in sitting with the groups. It was really in-depth, totally focused; a lot of involvement. "

Participant 5 noted that she didn't expect "…to be in the meeting the way we were…" She was surprised that people actually moved from group to group as bumblebees. She did not move herself. She commented, "I know its okay to go, to just get up and walk out. Of course, I didn't because I felt as though I would be rude."

Participant 2 was surprised and disappointed at the lack of immediate change but in response to other questions noted that participation in the event did affect his perception of himself and others positively.

Participant 6 felt that the event exceeded his expectations. He said, "It wasn't what I thought it was. It was actually better. I wasn't giving it enough credit when it first started, and I'm like, 'Okay. Here's a Saturday. Yeah, the whole Saturday.' And it actually came out better than I thought**."**

One of posters that are traditionally displayed at most Open Space events says "Be prepared to be surprised". (Herman, 2007) The underlying principle is that an Open Space event can be unpredictable because it can go wherever the participants want to take it. Question 3 was intended to capture whatever might have surprised the participants in the event. The facilitator is also often surprised at what happens at an event. In this case, the facilitator was surprised at the apparent intensity of many of the conversations. People were leaning into the conversations, appeared to be quite engaged, and stayed in the conversations they were a part of. He was also surprised that there was so little bumble bee or butterfly activity. Observations by the facilitator and two other observers, noted that only 2 or 3 people chose to change groups during each session. No one was observed engaging in "butterfly" activity, that is, staying outside of the groups in personal relaxation or thought.

Question 4: Did your participation in the event change your awareness of yourself or others or

your environment?

The participants' responses to this question both echoed and elaborated on the themes introduced in their responses to Question 1.

The most common response to this question was that the participants perceived a change in their attitudes towards other members of the congregation. For example, Participant 1 reported looking at others differently, seeing them "…with a gentler heart and a more understanding attitude." Participant 3 reported seeing a different level of respect as a result of the openness with which participants spoke of personal issues in the small groups. Participant 2 reported both the realization that he did not need to be validated by others and feeling uplifted as a result of changes in the way he felt he was perceived by others.

Several participants reported insights that will affect their approach to work in the church. Participant 4 recognized a need to delegate more and to permit others to take greater responsibility from the beginning to the end of a task. Participant 5 reported an increased awareness of the visibility of leaders and a need to be consistent and accountable for work. Participant 6 reported, "Well, I learned from it that everybody has opinions and they all matter. You could think, especially in church, that you have a lot of the answers, but you still need to be able to listen to others and we've taken that to the next step." Taken together these perceptions seem represent a change in attitude with respect to the role of leadership in the church.

Question 5: Did you feel a sense of community or connection and how did that affect you life
or reaction?

The pastor noted that the event created a greater sense of connection between the parishioners and the church because they were able to see that their pastor cared about the issues that concerned them. He stated: "So by having the Open Space, I have allowed ideas to come

from them and in essence giving them, the okay, this is a green light. I'm not just listening to you but I'd like to see your ideas implemented in the ministry …. So the relationship between us has improved."

Participant 6 agreed that providing an opportunity for the members to provide input made people feel more a part of the church. He pointed out, "…I think people just thought that they needed more input and that they wanted to be more a part of (*the church)* and I think this is what helped them to do that. It was a very good starting point."

Another participant reported that their spouse shared some things that were personal to their family during one of the groups. This indicated to the participant that the spouse felt a level of connection, and comfort within the group. The participant acknowledged, "It just brought to my awareness our different views about the issue and that I need to probably calm down and be more open and communicative about it. So for me, it was probably a positive thing. But it felt very negative."

Participant 4 reported the following observation, "When it comes to the community, as the Church is considered, I see a lot more involvement; a lot more of the Church getting involved with the month-to-month activities that take place here in the church; a lot more involvement with community meetings; a lot more involvement with coming to church on Sundays, etc., etc."

Question 6: How did you perceive the energy of the groups during the event?

Participant 3 saw the energy as changing from low to high as the groups progressed. He reported,"The groups that I sat in were really energetic. We really got involved in what the topics were." He also noted that the energy sometimes seemed the highest as the allotted time for the groups was expiring. He also expressed a common frustration, "You wanted to be in all the groups, but that group that you were in was so pumped up and exciting you couldn't move."

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The pastor felt there was a lot of energy in the groups. He saw that energy built as people got involved in the event. "If you might recall, a couple of my department heads had stated at the conclusion that during the wrap-up that they were a little apprehensive and reluctant about coming but after they got here, they got connected and got healthy energy. So I think all of us felt the energy. I certainly felt the energy with the subjects and the moving, the way it was structured."

The pastor attributed the energy to the structure of Open Space:

> "… the way it was designed, you went to that group because of your interest and so you had your own self-motivating factor in there. So you came with energy. You didn't come and say, okay, well, I've got to sit here for this meeting. I'm going to this meeting because I have interest in that meeting and if I'm going to go to the meeting, I'm going to be heard. I'm going to speak up.
>
> So it, in itself, produced its own energy and that was great. I never saw that before. And maybe that's partly the concept of Open Space is to produce self-energy, and self-interest, and awareness in those sessions.

Participant 5 also experienced the energy as "pretty high" and reported a "natural high" that came from being able to express personal feelings about the topics without being judged.

Participant 1 commented that some individuals stated in the closing circle that they were reluctant to participate but changed their minds as the day went on. She said, "But at the end, after, they said they didn't want to be there, but they got a lot out of it. So I was really glad to hear that and – because I didn't know what to expect."

As the facilitator , I too felt the energy. This group seemed to get deeply involved in their discussions quickly.

There was a repeated theme in the comments during the closing circle that the participants didn't know what to expect, that they were reluctant to participate but as they

participated during the day, they experienced a sense of involvement. It became clear during the interviews that the facilitator could have put more emphasis on the ability of the participants to adjust time and topics to meet their needs during the introduction.

Question 7: How was Open Space different from your experience with other meetings?

The responses to this question focused on the structure of the event emphasizing the ability of everyone to get their issues addressed.

Participant 2 described one group in this way, "…it was not just one person there teaching the class. There were three people there, and they were all saying one accord of making sure the lesson got to the beginning and the ending. "

Participant 3 said that the way the Open Space was set up was different than other meetings because it "…allowed us to be involved." He contrasted this to other meetings where, "there's a speaker who has his ideas of what works and don't work. In this particular meeting or discussion, it allowed us to pick a topic, pick a group that we wanted to know or be concerned about and then get involved with that."

Participant 4 made a similar point comparing the Open Space event to various trainings that the staff has attended in Chicago:

> This is just a little bit different. Because usually when we go there, there is a preset agenda and you have to endorse it, you have to sign on. Open Space, the agenda, the topic came up from within. It came from the people and so it had a different kind of energy with it.
>
> Because it is, I would say is self-interest energy, I think it immediately produces a connection, as opposed to the other meetings we go to. You sit there maybe the first 30 minutes and you're hearing an agenda that's being brought that you have to make up your mind do I really want to get behind this and sign on to this.
>
> And so Open Space, it's yours, you have ownership already. It's yours immediately. Now, you've got to do something with it. You're the one that

brought it up. Obviously there's a heartfelt burden there to talk about that
particular topic.

Participant 6 echoed these comments, "In a lot of the other meetings that we've had in the
church, basically the topic was decided. Sometimes you're talked at or talked to and there's little
opportunity many times for actual input, so this was to me a good opportunity for everybody to
get involved. I know you keep hearing me say that, but that's it."

Participant 5 focused on the bumble bee and butterfly metaphors as a way of capturing
the difference between Open Space and traditional meetings. The ability to move between groups
as he chose seemed to create a "mystical" experience for him.

The facilitator found it is interesting to watch people adapt to the structure or lack thereof
in a meeting in Open Space. This group followed a pattern that I have observed at most of the
Open Space events I have facilitated or attended. Initially, there is a reluctance to be one of the
first people to post a topic. Then a few people post their topics and soon you have many people
kneeling at their chairs writing topics and then announcing them. The only exception to this
pattern has been in groups attended by people with previous experience in Open Space.

The same holds true with changing groups. There is a general reluctance to appear rude
by changing groups but as the people begin to move from group to group the action becomes
expected and generally increases. During this event, I noticed very little movement between the
groups. I don't know whether to attribute the relative lack of movement to a strong sense of
propriety among the participants or to the engaging conversations that were occurring.

Question 8: Given your experience with this event, in what circumstances would you recommend the use of Open Space?

This question generated a number of suggestions for other uses of OS within the church and the community. Immediately after the event, two young women approached one of the participants and asked if they could do a similar event for the youth.

Participant 1 said that the staff mentioned Open Space in a staff meeting. "So it's like they're grabbing hold to the concept and trying to figure out ways that they can use it in their different areas, which is what I try to give them, tools to use with their own groups. So I think we will see more of it."

Participant 1 also suggested that OS might be used in the women's ministry as well as in community groups. She said, "Actually, I would like it to be used in just about every area because it's a clean, pure concept. You don't have to be a certified person to gather a group of people, ask some questions, get them together in a room, and let them discuss it. So it's something that I think a person that isn't trained can take on, and they can see it as something that they can do for themselves" (P1).

Participants 3 and 4 see it as being useful in community meetings to address neighborhood problems. The church is involved with a group of community organizations working on neighborhood issues. Participant 4 expressed some dissatisfaction with the current structure of the community meetings and thought that using Open Space might make the meeting more useful. He said, "And then we go home and we haven't really heard from the people, you know, the people that live in these communities. And so I think the Open Space with them would give them a chance to voice what's on their heart, what's going on in their neighborhoods and their block"

Participant 5 suggested that Open Space might be used to improve communications in a family setting. She talked about the tendency in some families to avoid discussing things that need to be discussed and suggested that Open Space, or something like it, might be a vehicle for surfacing those issues.

Participant 6 saw applications both within the church and in a work environment. He focused on changes in the church's Men's Recovery Facility that the church was planning. One of the issues that led the church to focus on internal concerns was the feeling by the residents of the Men's Recovery Facility that they were not fully accepted by the members. Several of the residents participated in the OS event and appeared to be involved in several intense conversations. They appeared to be paying close attention to the conversation and were in one of the groups that chose to continue beyond the scheduled time.

Participant 6 was wondering. "It would be interesting to see what would happen if you got them [*the residents*] involved with some of the decisions… we announced it and we're just going into it, but a lot of it still needs to be thought out, put on paper and decided…" He indicated that this might be a good time of an OS event focused on the changes to the recovery program.

All of the participants interviewed were positive about OS and would recommend using it in the future in a wide range of settings.

DISCUSSION

The objective of this study is to identify the perceived benefits of an Open Space event in a protestant church in Oakland. The previous section presented the impacts identified by the participants interviewed for this study. The term "impacts" is a more neutral term than

"benefits". It is a better term to describe what I was looking for in this inquiry. An impact can be beneficial, harmful or neutral in terms of organizational and personal life. Whether I call them impacts or benefits, it is clear from the comments above that something happened during the Open Space event that changed both individuals and the organization. All of the participant's interviewed were enthusiastic about their experience with Open Space and felt it was beneficial. This discussion explores the specific themes identified by the participants with a view to understanding how the results described were achieved. Additionally, I will identify connections between these benefits and the results noted by other researchers who examined different OS events.

As I noted previously, the church changed the focus and theme of the event from developing more outreach to the community to *Discovering How to Strengthen the Bonds of Fellowship*. This change was a result of a perception that problems with interpersonal relationships were developing that needed to be addressed. The new topic fit the conditions Owen (1997) believes support the use of Open Space Technology. The conditions are:

- ❖ High levels of complexity
- ❖ High levels of diversity
- ❖ High potential or actual conflict
- ❖ A decision time of yesterday (Owen, 1997, p.41)

The new topic certainly had more urgency and more potential for conflict than the initial topic initially proposed. It also had the requisite element of urgency. The diversity level might not initially appear to be very high since the church is primarily African-American but within the church there are substantial differences in economic means, class, education, and values. There

is certainly enough diversity to meet Owen's requirements for the use of Open Space. I believe that the topic provided juicy material for the OS Event.

Expectations

One of the consistent themes was that the event was not what most of the participants expected. Each person came to the event with a set of expectations based on their individual experience and concerns. As the event unfolded, most of the expectations turned out to be inaccurate predictions of the event. This is not unusual. It is, in fact, so common that a sign posted at most OS events encourages the participants to "Be prepared to be surprised!"

The first set of participants to be surprised were those who expected to end the event with a list of action items. This is not an unreasonable expectation. In fact, OS can generate specific action lists or even complex designs. An example of detailed action planning was the redesign of the AT&T pavilion in the Olympic Village for the Atlanta Olympic Games in which a design that had taken 10 months to create was redone in days. (0wen, 1997, P.48). I think the periods go on the outside of the page number. Could you make sure that all of yours in this section are correct?

Whether or not an OS event generates an action list depends on the purpose and design of the meeting. If it is appropriate for the topic, the reports from each discussion group can identify actions that are needed to accomplish whatever the group thinks is important. When all of the reports are posted, there are several approaches to achieving "convergence" or agreement on the tasks and their priority.

One commonly used method is multi-voting. Each participant is given a number of stickers to use to indicate the tasks he or she thinks are important. The tasks are prioritized based the number of votes.

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Another method is to convene new discussion sessions focused on developing specific action plans for particular tasks.

A third option is to simply have people sign-up for the tasks for which they will accept responsibility for developing implementation plans.

The key is that convergence can take time. That is why, whenever possible, OS events are scheduled to take two or three days. In this case the event was scheduled for a single day which did not permit an attempt at convergence. The topic didn't seem to require action planning to bring the participants a sense of completion.

The next group to be surprised was those who were concerned about what would happen during the event. As noted in the ~~in the~~ results section, there was some level of concern that the participants would raise questions that the leadership of the church was unprepared to answer. This, too, is not an unreasonable concern or expectation. It can happen that issues are raised that touch sensitive points in the organization. Daniel (1996) describes issues raised during the event she observed, that made management uncomfortable. Management acknowledged the issues and expressed appreciation that the issue had been raised so that it could be addressed publicly. (p.119). Owen (1997) warns that Open Space should not be used when the results are predetermined. He argues that the desire of management to control the outcome of an Open Space event is one of the most critical issues in planning for an Open Space event. He states, "If you are in a control mode, think you are in control, or want to be in control, Open Space is not for you, and you are not for Open Space." (p.39)

On the other hand, if leadership is willing to trust the OS process, and experience, ~~and~~ most of the studies cited in the literature review indicate they will be surprised by the results of the OS event. Openness to the experience can provide opportunities to receive new information.

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Open Space encourages the flow of ideas from unlikely sources. Daniel reports that a significant

product development idea came from a security guard (p.146).

In situations with a high potential for conflict, Open Space can make a positive

contribution. Owen (1997) claims:

> It would be reasonable to ask what the limitations are? in the use of Open Space
> in a situation full of conflict. I would insist that to? some groups that they leave
> weapons outside, but other than that I have yet to encounter a group of people or a
> set of issues where Open Space would not make a positive substantive
> contribution. (p.38).

The final group to be surprised was were those who had low expectations or who felt the

day might be a waste of time. Attendance at the event was lower than the leadership expected.

Some people attended out of a sense of duty but not expecting much to come of the event. In the

Closing Circle, several participants admitted their initial doubts and acknowledged that as the

event proceeded they became involved. This is not unusual. Open Space is a significant

departure from the way meetings are usually run. It is hard to explain to people that such a

meeting will be useful. This church was willing to try Open Space, in part, because one of the

members has been introducing the church to a variety of group methods. There was a certain

amount of trust that led to a willingness to participate in something different.

Changed Relationships

The church changed the focus of the planned Open Space event from an external issue to

relationships between members of the congregation. Some members reported feeling

disrespected by others. The hope was that the Open Space event would provide a forum to

address these issues. The responses of the participants interviewed indicated that the event did

address the issues and change participant's attitudes towards other members of the congregation.

The key to any change in the relationships between people that may have occurred is that

they began to talk to each other. Wheatley (2002) describes what happens when people do not

talk to each other:

> When we humans don't talk to one another we stop acting intelligently. We give up the
> capacity to think about what's going on. We don't act to change anything. We become
> passive and allow others to tell us what to do. We forfeit our freedom. We become
> objects, not people. When we don't talk to each other, we give up our humanity (P.26).

When people do engage in conversation, several things can happen. First, people can get

to know each other. They are more likely to see each other as individuals rather than a label.

Several participants noted this change in their perceptions of other. Once you see a person as an

individual rather than a stereotype, you can hear them in a different way.

In conversation you can find common ground or interests. Even when you are not in

agreement with another person, knowing the person who holds a different view seems to change

the dynamic of the discussion.

Wheatley (2002) describes principles that she emphasizes when beginning a formal

conversation process. The principles are:

We acknowledge one another as equals.

We try to stay curious about each other

We recognize that we need each others help to become better listeners

We slow down so we have time to think and reflect

We remember that conversation is the natural way humans think

We expect it to be messy at times (p. 29)

Wheatley was not writing about Open Space but her principles are consistent with the practice of Open Space. They provide a lens for viewing Open Space as a way of creating the conditions for real conversation. She states that starting a conversation can require courage (p.26).

One of the reasons Open Space works is that it provides a safe space for conversation. McPhee (2006) concluded after her examination of an Open Space event dealing with controversial questions about the future of their community that people needed to feel safe before tackling important issues (p.85).

There are two keys to the feeling of safety that can be created during an Open Space Event. The first is the commitment of the sponsors to the event. The sponsors must be willing to accept and support the process. The second and most important factor is t*he Law of Two Feet.* The practical implication of the Law is that you can leave a discussion when it gets too intense. If you need time to reflect, are feeling put upon by the group, or are getting angry, the law gives permission and even encourages you to leave and find a another group.

I have observed *the Law* at work in other Open Space events. In one event, an individual who was a vegan posted a topic on the relation of diet to peace. No one else was passionate about that topic, so the individual had a group of one and used the time to write out the argument for inclusion in the book of proceedings. In another event, an individual wanted to discuss the relationship between racism and the main topic. Again no one shared her passion and joined her

group. She joined another group but expressed some anger at the failure of everyone else to see the importance of racism.   While she remained upset at the failure of the group to agree with her, she participated in further discussions. In each case, the group voted with its feet not to join a discussion that did not capture their passion. However, the individual had the opportunity to be heard. So a sense of community remained intact.

Strengthening the Community

The participants in the Open Space event reported that, in addition to feeling personally more connected to the church, they observed changes in attitudes and behaviors in others they interpreted as an increase in enthusiasm and commitment. What is it about participation in a short seven hour event that can change behaviors and attitudes?

The first reason that individuals might feel more connected to the organization after an Open Space event is that they feel heard and understood.   The feeling of being heard can lead to the realization that one is accepted and valued by the organization. This in turn leads to a stronger feeling of connection.

Open Space encourages participants to exercise both passion and responsibility within the event. Owen (1997) calls passion and responsibility "the engines of Open Space" (P.27).   What the participants reported feeling and observing is the exercise of passion and responsibility flowing out of the Open Space into the life of the organization and its members. In another Open Space event-, that I observed, one group felt a passion for the idea of an annual church retreat. It appeared that no one was taking responsibility for organizing the retreat. Members of that group became the organizing committee for the next few retreats.

New Ways of Doing Things

The church which was the object of this study may have experienced some new programs that grew out of the event. I have to say "may have experienced" because my informants were not in complete agreement about whether the programs were a direct result of the event or whether the event merely added to the interest in the new programs. Since this event was limited to a single day, no time was scheduled to identify priorities and action steps. Often in longer Open Space events, time is scheduled for "convergence" or bringing the group together to decide on and prioritize next steps. There are a wide variety of approaches to this task used by different Open Space facilitators. Corrigan (2006) describes several approaches to convergence:

> So today we started playing with two ideas, one new and one old. The old one is to simply add to the small group summaries form from? a place for people to record next steps. The new idea is to create an action market place next to the news wall. This is no more complicated than a community bulletin board, in that people can feel free to post any bits and pieces of action that they want to invite others to join. The advantage of this system is that it allows a finer grain of action to come forward, so for example, while there may be some conversations that emerge in the event about what to do next, the action market place could hold much smaller pieces that would otherwise be lost. Action around a follow up conference would stand alongside an invitation to join one or two people in writing a new brochure, or meeting for coffee next week to continue a conversation. (n.p.)

The fact that the design of the Open Space Event did not include convergence or prioritization activities makes it difficult to link program results directly to the event. Event sponsors desiring to get action plans as a result of an Open Space event will have to structure the event to allow time for convergence. This will usually involve planning more than one day for the event.

One significant result of the event was identified by several of the leaders. There is a new recognition of the importance of input from everyone on the congregation. The example of

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Open Space created a greater willingness to promote broader involvement in decision making. The G12 initiative is a leadership group that applies some Open Space like processes to decision making in the church. Individuals choose the leadership group/task in which they want to be involved.

The Structure of Open Space Contributed to the Results

A core feature of Open Space is that it gives the participants permission to do whatever they like with the time they are together. The facilitator's response to almost any question about what a group should do is "What do you think you should do?" *The Law of Two Feet (or Mobility)* gives the participants permission to enter or leave groups at will. This is reinforced by the metaphor of the bumblebee. Just as a bumblebee carries pollen from flower to flower, in Open Space a bumblebee carries ideas from group to group.   An additional metaphor, the butterfly, gives the participants permission to avoid being in a group at all and use the time for personal reflection or relaxation.

The ability to post topics for which you have a passion and choose the discussions in which you wish to participate creates an atmosphere in which all participants feel they can be heard.   This structure creates the sense of safety that permits real conversations to take place.

Open Space is not primarily a conflict resolution method. In this case, the change in the topic to focus on internal issues in the church was intended to address the conflicts that were occurring. Open Space deals with conflict not by directly confronting the conflict but by giving people the opportunity to work on common tasks and engage in meaningful conversations. The permission giving described above provides an escape valve that permits conflict to deescalate. Corrigan (2003) describes how Open Space addressed conflict in an extremely conflicted community.

My partner Chris Robertson noticed that when the issues went up on the wall, they became de-personalized. This made it easier to attack the problems without attacking people. In the opening circle on the second day the attacks were getting personal before I invited the issues to go up on the wall. The other thing that worked was having somewhere to go. As the big circle broke up and the small groups got underway, people came back to the main meeting area when things grew too hot and heavy. Most often they gravitated to the coffee machine where light conversation was taking place. There was laughter there and people were more relaxed. When they felt ready, they could go back to the small groups and re-engage. It struck me that having many centers around the main meeting space, left the main space as a kind of sacred place where people could come to re-charge. The folks who were butter-flying around the coffee machine were holding a kind of positive space for anyone who needed it. In the larger circle we would never have had this safe space emerge. It felt very quickly like space was closing and with nowhere to go, people started going for the jugular. Small group space loosens the body of the conflict and allows for Spirit to show up in just the right ways. (n.p.)

In the case of the church in this study, the Open Space process allowed individuals to get

to know each other in a safe place. As people got to know each other better, the ill feelings

between various groups seemed to have been reduced.

Michael Hermann (1998) summarizes the results or impacts that can be expected from an

Open Space event:

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. (n.p.)

Limitations of Open Space

The primary limitation of Open Space is that it depends on the willingness of the participants to engage in the process. In this case study, the participants apparently engaged quickly and deeply.   However, there may have been issues that were not raised because no individual was willing to raise a difficult issue directly, e.g. (do you know of any?). To the extent that the participants embrace the process, the type of results that were observed in this case, could be expected.

The impact of the Open Space event might have been greater if more of the church's members had participanted. It is a principle of Open Space that "Whoever comes is the right people." The idea is those who truly have passion for the organization or issue will attend. Still one can always wish that even more people had felt enough passion to get them to the meeting.

The second major limitation is the difficulty of persuading the sponsor to dedicate enough time for the event. The event in this case provided the church with real results. Had the sponsors been willing to devote more time to the event, there could have been more focus on developing action plans to address the needs of the church.   The topic of the Open Space event did not require a strong commitment to action planning. The primary desired changes occurred in the event itself.

LIMITATIONS OF THIS RESEARCH & SUGGESTIONS FOR FUTURE RESEARCH

This research identified specific results from the Open Space event held in June based on interviews made in August and September. Memories may have faded to some degree. It was still too early to determine whether the report results will persist.

The primary recommendation for future research is to engage with the organization over a longer period of time. An Action Research approach in the researcher follows the organization through several iterations of Open Space and implementation steps would be a significant addition to the literature.

Additional comparative studies of Open Space and other large scale interventions could shed more light how the processes work by identifying similarities and differences in the individual participant's experience.

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APPENDIX A – INFORMED CONSENT FORM

The following informed consent form was adapted from a form developed by the Open

Space Institute for use for research to be included in a data base of research findings maintained

on the Open Space Institute's website. Excerpts from the research interviews may be added to

the Institute's website and they require an informed consent form. This single form should meet

the requirements of both JFKU and the Open Space Institute

INFORMED CONSENT

Open Space Technology Research Project – John F. Kennedy University

You are being asked to give your consent to allow the use of the information you provide as part of research project on Open Space Technology. The information you provide will be used in a study titled: *Open Space Technology: Exploring the Perceived Impact of an Open Space Event* conducted by Robert L. Sullens a graduate student at John F. Kennedy University. The information provided will also be used as part of a global data base on Open Space Technology..

The purpose of this project is to gather perceptions of the experience of and impact of Open Space Technology. The intent is to discover, analyze and report or publish the patterns in perceptions to assist our further understanding of OST and its effect on people and organizations. Those perceptions are to be recorded in the words and stories you use in your interview.

The information will be gathered through interviews or inquiry, using a standard series of questions and recorded by the person doing the interview.

The interviews will take from half hour an hour.

Reflecting on Open Space Technology will both provide information for this project and will assist you in learning from your experience with the approach.

You have been chosen by the interviewer because of your involvement as a sponsor, or as part of the planning team, or as a participant for The Open Space Technology event sponsored by PFCC and where the interviewer was a facilitator .held on June 9, 2007

Unless you explicitly give permission, you and your organization will remain anonymous and your name will not be included in any data that is posted to the research project. We will indicate the broad sector which includes your organization in analysis of the information.

Participation is voluntary and you may discontinue participation at any time.

FOR CONSENT TO USE YOUR INFORMATION ANONYMOUSLY
Please sign the following:

I am fully aware of the nature and extent of my participation in this project as stated above and the possible risks from it. I hereby agree to participate in this project. I acknowledge that I have received a copy of this consent statement.

_____ _____
Signature of participant   **Date**

_____ _____
Printed name of participant

_____
Signature of interviewer/investigator

E-mail address (if you wish to receive information on findings developed from the information)

FOR CONSENT TO USE YOUR NAME AND YOUR ORGANIZATION'S NAME
Please sign the following:

I am fully aware of the nature and extent of my participation in this project as stated above and the possible risks from it. I hereby agree to participate in this project. I also give my consent to use my name and my organization's name in quotations taken from this information. I have the authority to authorize the use of my organization's name. I acknowledge that I have received a copy of this consent statement.

I consent to the use of my name: _____

I consent to the use of my organization's name: _____

APPENDIX B – INTERVIEW QUESTIONS

OSI Questions

1. Tell me a story about how OS has deeply affected you or your organization.

2. **Invaluable Goodies.** Open space can have many practical and subtle impacts that ripple and resonate long after the event has ended. Tell me your stories of direct and indirect outcomes

3. **Being Here Now.** The essence of Open Space is taking responsibility for what you love. This leads to embracing personal choice and paying attention to others and ourselves. How has your awareness of yourself, others, and your environment, changed? What difference has that made?

4. **Intimate Community.** People consistently talk about feelings of acceptance, trust, openness and support in Open Space. They express amazement at the sense of intimacy. How has this sense of community, connection, and receptivity affected your life?

5. **Simple Complexity.** Open Space has an elegant simplicity that allows us to address great complexity. Where and how has the experience of simple complexity served you?

6. **That for Which We Have No Name – The "X" Factor.** Some call it Energy, some call it Spirit. It is that mysterious power that defies description which pervades OS. Tell us, if you tapped into this magic, what has changed for you?

7. How was OST different from your experience of other meetings or events?

8. Given your experience, in what circumstances would you recommend the use of OS to others?

9. What three wishes do you have for furthering the effect of open space?

Revised Questions

Can you tell me a story about how the event has affected you or the Church?

1. Can you tell me about any direct or indirect results or outcomes, something that changed as a result of the event?

2.

3.

4. Did you feel a sense of community or connection and how did that affect you life or reaction?

5. How did you perceive the energy of the groups during the event?

6. How was Open Space different from your experience with other meetings?

7. Given your experience with this event, in what circumstances would you recommend the use of Open Space

Appendix C: *Sample e-mail invitation to identified participants:*

SUBJ: Invitation to Participate in Study: Exploring the Perceived Impact of an Open Space Event

I am a graduate student in Organizational Psychology at John F. Kennedy University. As part of the requirements for the completion of my Master's degree, I am conducting a research study on the perceived impact of the Open Space event at PFCC in which you participated; I am requesting your consideration to participate in this study.

The purpose of this project is to gather perceptions of the experience of and impact of Open Space Technology. The intent is to discover, analyze and report or publish the patterns in perceptions to assist our further understanding of OST and its effect on people and organizations. The data for my research will be collected by interviewing participants in the event. I expect the interviews to take between 45 minutes to one hour and can be done in person or over the telephone. Your perceptions as recorded in the words and stories you use in your interview will become the basis for my analysis.

Participation is completely voluntary and you are free to change your mind at any time and choose not to continue. Should you choose to participate, all information you give during the interview process will be confidential and your individual contributions will be anonymous. All data collected during the interview process will be stored in a secured, confidential location accessible only by me and a third-party transcriber. Each participant will be identified on the tape by first name participant code only. I will also make a copy of the completed project report available to you at your request.

Thank you for your consideration. I sincerely hope that you will choose to participate! If you have any questions or would like to talk with me further prior to making a decision to participate, please feel free to call me at 707-429-5359.

Sincerely,

Robert L Sullens