



Open Space Facilitator's Checklist

What to remember when planning or hosting an Open Space Technology event

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This is not intended to be definitive, and makes more sense with good tuition.
Good luck, and please share your experiences with us and the OST community.

Pre-event

Who is the organising team & sponsor? Determine roles.

Get clear about the need / purpose / theme / question > invite

Consider audience and stakeholders

Determine desired outcomes, format for any output, how to capture important information from sessions, and how to ensure it happens (quality in designing in the outputs in advance determines quality of reports and other outputs), follow up meetings or communication as applicable

Some of the options for session outputs:

- Digital photos of session output sheets, uploaded directly, or scanned if on A4
- People type as they go during day into WP documents
- Team of assistants to help typing
- Online 'Wiki' type page, GoogleDocs or similar for direct input into a shared space, projected 'Twitter wall' for tweeted updates
- Video summaries, audio recordings
- Plain postcards with summary, decisions & action points > photocopied 3 at a time onto A4 and distributed as a book at the end of the day to take away
- Go radical: Don't 'coerce' the capture of anything at all: give complete responsibility to participants to capture anything that feels important, in a way that suits them! Perhaps the notes aren't important, but the personal experience of participating is?
- Facilitator goes home with lots of sheets of paper to type up later (*not recommended!!*)

Determine date and duration

Publicity and preparing participants

Booking and budgeting

Venue

- Ensure large wall space, preferably completely clear
- Accessibility, disabilities
- Materials, furniture
- Available breakout spaces

Food and refreshments (including Vegan and other special cases)

Equipment and materials - are laptops, printers, microphones, scanners needed?

Photography and video?

Support team - roles?

Will any post event space be needed, for example, restaurant or bar?

Determine number and lengths of sessions, probable number of breakout spaces desired

Event

Personal preparation - so you can best serve participants / sponsor

Equipment checklist

- Flipcharts, pens, cards or paper for announcing sessions for the bulletin board
- Masking Tape (easier on walls) or Bluetac (check with venue if allowed)
- Possible: proforma session output sheets to hand out, perhaps with simple instructions (including clear handwriting), request for action / next steps to be listed, contact details of host / notetaker...
- Laptops functioning with WiFi codes available if needed + Microphone(s) / PA / printers / projector / plenty of sockets and extensions if necessary
- Singing bowl or similar gentle but audible sound to denote session finish / starts, if desired
- Microphone(s) / PA / printers / projector / plenty of sockets and extensions if necessary
- Make the space beautiful and welcoming... flowers?

Venue

- Breakout (session or workshop) spaces
- Signage, including breakout space name signs - suggested: 2 of each space name sign (eg Room 6, 'Anteater', or Yellow); 1 to denote space + 1 to place on bulletin board
- Refreshments area - food taken care of?
- Registration desk / participant welcome as required
- Arrange or check layout of chairs - leave plenty of space between circle and market place, and between concentric circles of chairs. Recommended - circle layout in 4 quadrants, with 4 aisles for access.
- Set up market place:
 - Bulletin board (agenda wall)
 - Announcements, community news or similar information sharing spaces
 - Space for session outputs

Signs

- *5 Principles:*
 - Whoever comes are the right people** - it is only important that people who care show up, who are able to participate right now
 - Wherever it happens is the right place** – sometimes the best conversations, the ones you really need to have, happen spontaneously by the coffee machine, in a corridor, in the ladies or gents
 - Whatever happens is the only thing that could have** - keeps people focused on the here and now, not what might have been or should be
 - Whenever it starts is the right time** - performance and creativity rarely pay attention to the clock
 - When it's over it's over** - don't waste time, do what you have to do, then move on to something else
- *1 Law: The Law of Two Feet* - if you are neither learning or contributing then it is your responsibility to be somewhere more useful
- **Be prepared to be surprised!**

- Sometimes people like to also include butterflies and bumblebees as reminders

Opening Space

- Introduction to the event, theme
- Housekeeping announcements: mobiles, fire exits, accessibility issues...
- Explain Open Space, how the event will run
- How to fill and negotiate around 'agenda' (bulletin board)
- Hand the space over to participants... Let go!

Holding Space

"The Master doesn't talk, she acts. When her work is done, the people say, "Amazing: we did it, all by ourselves!" – Adapted, from Tao Te Ching (17)

- Practice the art of OS hosting: empower others to find their own solutions as much as possible (invite leadership)
- Keep an eye on the wellbeing and functioning of the event: food, refreshments, cups get returned to the kitchen, enough pens and paper...
- Make sure latecomers are welcomed
- Keep an eye on outputs, reports, typing up, any information that needs to be shared via notice boards

Movement To Action

Plenary, presenting of report summaries, prioritising, action planning, convergence... as appropriate

Closing Space (varies depending on duration of event: up to one day, or longer)

- Very brief words from participants to sum up their experience of the day
- What next, outputs, social

Outputs

Distribute reports or outputs or ensure clarity of how it will happen, as applicable

Post-event

Debrief, let off steam, celebrate, learn

Distribute money, pay bills, finalise the event accounts

Follow-up: links to outputs as applicable

Evaluation / feedback request

Acknowledgement / thank you email

Next steps: who when why what where how