

TO: UUA Board of Trustees

FROM: Helen Bishop  
Gini Courter  
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RE: Open Space Technology

DATE: December 18, 2006

First of all, thank you for your enthusiastic and prompt response to the request for volunteer facilitators. We are clearly prepared to engage in this new challenge.

Helen Bishop, who is managing the Open Space Technology (OST) process, has drafted six documents for us to review in preparation for our discussion of OST at our January meeting on Thursday evening and in our working groups on Friday. The materials are:

- Frequently Asked Questions about Open Space Technology
- Sample workshop (1 1/4 hours)
- Law of Personal Mobility
- Butterflies and Bumblebees
- Four Principles of Open Space
- 50+ ways to raise \$\$\$ to send delegates to GA

If you are still curious, you may also want to visit [www.openspaceworld.org](http://www.openspaceworld.org)

The January board meeting will give us an opportunity to begin to develop some familiarity with the process and generate questions and comments for Helen's consideration. Helen will join us at our April meeting where, under her leadership, we will have an opportunity to experience Open Space and learn even more.

## What is Open Space Technology?

Open Space Technology is a large group intervention process developed by Harrison Owen, who noticed that much of the work that takes place at a conference happens during breaks, or in informal settings such as over meals or around the coffee/tea/soda area. Owen designed a process in which a topic focus is provided, and a facilitator encourages people to lead small group discussions that relate to the topic. Many small groups meet at the same time, come back together to hear reports from one another, and receive reports from other areas that also relate to the topic. Participants are invited to make use of the Law of Personal Mobility - if someone discovers that s/he is not in the right place, s/he is encouraged to find the right place, wherever that is. Owens also outlined Four Principles for Open Space:

- Whoever shows up are the right people.
- Whatever happens is the only thing that could happen.
- Whenever things start is the right time.
- When it's over, it's over.

## How will Open Space Technology be used at General Assembly?

At General Assembly in Portland OR, delegates and attendees will have the opportunity to begin the work of creating a mission and outcomes for the future direction of our Association of congregations. We will use open-ended questions like "How should the Unitarian Universalist faith community be in the larger world?" as the basic focus. The UUA board, which is exploring policy governance, is beginning to explore ends statements related to this topic. General Assembly attendees will have the opportunity to participate in several Open Space workshops, and delegates will vote on prioritized statements from these workshops during the last plenary session. on Sunday The UUA board will consider these statements in the development of a mission and ends statements, and will report on their progress in January and April 2008 in preparation for General Assembly 2008. Next steps at GA 2008 could include a vote on a mission and global ends, or further Open Space workshops to refine the work done at General Assembly 2007.

## Why use Open Space Technology at General Assembly?

The Unitarian Universalist Association board is exploring policy governance, and is working on ends statements in response to three questions that policy governance boards address:

- Whom do we serve?
- At what cost?
- For what reason, or toward what end?

Trustees would like to hear from congregational delegates about what they think the mission of the Association should be. This question might be framed in this way: "In today's complex world, what is our mission as a faith community?" Open Space Technology offers the opportunity for General Assembly delegates, as charged by the congregations they represent, to help define the direction of the Association and offer guidance about its mission to trustees.

### What happens in an Open Space Technology session?

When participants enter a room where Open Space Technology will be used, they find chairs arranged in concentric circles, or U-shaped rows. The space is arranged so that people using wheelchairs or scooters can move around. In the center of the room, participants find sheets of newsprint and lots of water-based, scent-free markers. The number of newsprint sheets is equal to the number of breakout spaces available. A facilitator with a portable microphone is in the center of the room.

Once all the participants have entered the room and found a place to sit, the facilitator introduces her/himself and goes over the Four Principles of Open Space, the Law of Personal Mobility, and the concept of Butterflies and Bumblebees. Moving around in the middle of the room, s/he makes eye contact with participants while stating the framing question, which is open-ended. S/he then invites people who would like to facilitate a small-group discussion to come forward and pick up a sheet of newsprint and a marker. Each person who wants to facilitate a session writes his/her name on the newsprint, along with the title of the small group session. When the newsprint sheets are gone, people who want to facilitate a small group session come to the center of the room and give their names and session titles. Their newsprint sheets are then posted on the wall.

Once all the small group sessions have been announced, participants write their names on Post-It notes and put the Post-Its on the newsprint sheets. The large group facilitator assesses the small groups in terms of breakout spaces available, and creates a grid showing workshop titles and locations. S/he then announces titles and locations, and participants go to the small group sessions, where the small group facilitators take notes on newsprint, using a report format provided.

One possibility at General Assembly is that when the small group session time is over, participants return to the original meeting room, where

small group facilitators report back on their sessions, and post their newsprint sheets on the wall. Once participants have heard reports from all the small groups, the session is over.

Another possibility is that the small group facilitators will return to the original meeting room and give the large group facilitator their newsprint sheets. In that case, participants would not return to the original room.

In any event, the large group facilitator will report back on the sessions, using a form provided. The Open Space Technology team will use these reports to generate a community newsletter that will be printed and copied for all GA participants by the end of the day. These reports will serve as the basis for the next round of Open Space.

The next to last Open Space session will be used for prioritizing ideas related to the mission of the Association in each of the ten domains being considered. In each domain, the top three concepts will be put forward, so in the last session delegates will discuss and vote on the thirty prioritized concepts, providing guidance to the UUA board on mission and outcomes.

#### What's an example of how Open Space Technology has been used?

Open Space Technology has been used in community and organizational settings for strategic planning purposes when input from many sources is important. Planners often use Open Space to establish initial priorities, and follow up with another Open Space conference at a later date. Open Space provides a means of bringing multiple and disparate voices together to determine what people believe is important. A strong likelihood exists of using Open Space again at General Assembly in Fort Lauderdale a year later to continue the process begun in Portland.

## Sample Open Space Technology Workshop - 1 1/4 hours

### Materials:

- Sheets of newsprint - each small group will need a newsprint sheet and a marker, so the number of newsprint sheets should equal the number of small groups that can be accommodated in the space available. For a workshop lasting 1 1/4 hours, three or four sheets of newsprint will be needed.
- Ample supply of dark (black, blue, brown) scent-free water-based markers
- Rolls of masking tape
- Post-It notes - each participant needs one Post It
- Signs showing the Law of Personal Mobility, Butterflies and Bees, and the Four Principles of Open Space
- Report form for small group facilitators
- Report form for large group facilitator
- Portable microphone system

Room arrangement: Chairs should be arranged in U-shaped rows or concentric circles, with room so people using wheelchairs or scooters can move around. Facilitator should use a portable microphone. Three or four breakout spaces will be needed - these spaces could be in different rooms, or people could move chairs around to create small-group spaces in the workshop room. All breakout spaces should be accessible to people using wheelchairs or scooters.

Framing question: Facilitator should prepare an open-ended question that lends itself to a variety of perspectives. Examples for Unitarian Universalists might include:

- How should a Unitarian Universalist congregation be involved in the larger community?
- What's the role of worship in a Unitarian Universalist congregation?
- How should a Unitarian Universalist congregation be organized?
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### Workshop

5 min. Facilitator welcomes participants and introduces him/herself

- 5 min. Explanation of Law of Personal Mobility, Butterflies and Bees, and the Four Principles of Open Space
- 5 min. Invitation to people who want to facilitate a small-group discussion on some aspect of the framing question to come forward and get a sheet of newsprint and a marker. Assistance should be available to people with mobility issues who can't get to the center of the room quickly. People who want to facilitate a small-group discussion should write their names and a title on a sheet of newsprint.
- 5 min. Using a portable microphone, each person who wants to facilitate a small-group discussion lasting 20 minutes should state his/her name and the title or focus of the discussion. The newsprint sheets with facilitator name + title/focus should be posted on one wall of the meeting room.
- 5 min. Each participant should write her/his name on a Post-It sheet and place the Post-It on the newsprint sheet with the title/focus s/he wants to discuss. Assistance should be available to anyone who has difficulty writing, or difficulty putting his/her Post-It on a newsprint sheet. When everyone has put a Post-It sheet on newsprint, the facilitator should announce where each small group will meet, and create a master list of where the groups will be meeting. Facilitator should ask people to return to the meeting room at the end of the 20-minute small group discussions.
- 20 min. Small groups meet to discuss the framing question. People should follow the Law of Personal Mobility - if they discover they're in the wrong place, they should go to where the right place is. Facilitator should take notes on the newsprint sheet using a standard format provided, and people should return to the meeting space when the 20-minute small group discussions are finished.
- 25 min. Once participants have returned to the meeting room, each facilitator should report on the small-group discussion. Notes from each small group should be posted on the wall. Reporting time should be divided equally among the small groups, and the OST facilitator should monitor the time so each group has time to report and respond to questions or comments.
- 5 min. OST facilitator should thank the small group facilitators for

their work, and the participants for attending and being involved in the small groups. Facilitator can close with a short reading.

## Raising money to send delegates to General Assembly

On average, sending a delegate to *General Assembly* costs around \$1,500, including registration fees, transportation, housing, meals and expenses. Your congregation has the opportunity to have its voice included in the mission of the Association IF you send all the delegates your congregation is entitled to. Each congregation should have a "GA delegates" fund, and all proceeds from these fundraising events should go into the fund. The board president can apply for a scholarship to pay up to half of the registration fees for GA. If your congregation doesn't usually pay delegate expenses, here are some ways to raise the money to do so:

- Ask major donors from your congregation to contribute \$500 each to the fund.
- Divide \$1,500 by the number of adults in your congregation, and ask every adult to donate that amount to the fund.
- Ask a group of major donors to match contributions made to the fund.
- Organize a monthly "Everyone can dance with everyone" dance. Cost of admission is the amount each adult in your congregation needs to donate to the fund.
- Ask someone who loves to entertain to put on a gourmet feast. Each adult attending should be asked to donate \$50 to the fund.
- Organize a raffle/auction of services and goods. All proceeds go to the fund.
- Ask children and youth to organize a car wash, with a suggested donation of \$20/car. All proceeds go to the fund.
- Auction "Lunch with the minister," "Lunch with the Director of Religious Education," "Lunch with the Music Director," "Lunch with the Administrator," and "Lunch with the Board President."
- Auction off a sermon topic.
- Auction off a worship service focus.
- Ask children and youth in the religious education program to create artworks on "What it means to be a Unitarian Universalist," and auction off the art.
- Ask people to bring loose change to drop into a "GA delegates fund" jar. Children and youth in the religious education program can count the money and report progress toward the goal of supporting all the delegates your congregation could send to *General Assembly*.
- Put double-sided tape around the perimeter of your sanctuary, and ask people to put quarters on the tape. Children and youth could calculate how

many quarters your sanctuary would hold, and how many times you'll need to fill the tape to fund your *GA* delegates fully.

- Put "*GA* delegates" trees in the room where you have refreshments after worship, and ask people to pin currency on the trees until they are full. Keep adding trees until you've raised enough money to pay the expenses of all the delegates your congregation is entitled to.
- Put a "*GA* delegates fund" box next to the refreshments you serve after worship, and ask people to drop paper currency into the box every time they take a cup of coffee or a snack.
- Organize a fashion show, with a suggested donation of \$10/adult. Ask people to model what they think *GA* delegates should wear.
- Ask someone who loves to bake to donate a "Bread of the Month," and auction it off.
- Ask someone who loves to garden to donate a class in organic gardening, and auction off the class.
- Ask a masseuse to donate massages, and auction them off.
- Auction off musical performances to be used as offertories.
- Ask people to make contributions in honor of people they love, and create a book of photos and short writings about the people being honored. Display the book in a prominent place, with an explanation inviting people to make additional contributions.
- Organize an evening of Circle Suppers with each adult asked to donate to the fund.
- Ask youth in the religious education program to offer babysitting services and donate what they earn to the fund.
- Auction off a portrait photograph.
- Ask people to donate used books, and hold a silent auction of the books.
- Ask people to sponsor children and youth in the religious education program in a trike/bike ride in the parking lot.
- Organize a "Pooch and Pet Parade," and ask people to sponsor the animals.
- Ask quilters to create a wall hanging to celebrate the life of your congregation, and auction off the quilt.
- Ask knitters to knit watch caps, hats and mittens, and auction them.
- Organize a weight loss contest, and ask congregational members to sponsor people losing weight.
- Organize a "Stop Smoking" effort, and ask congregational members to sponsor people who want to quit smoking.
- Ask people to donate Frequent Flyers miles to get delegates to *GA*.

- Organize a special musical event such as a choir performance, instrumental concert, or SingAlong. Ask audience members to make donations to the fund.
- Ask a composer to create a special piece of music, and auction it off.
- Ask someone to write a play about someone from Unitarian Universalist history, and ask children and youth in the religious education program to put the play on, for donations to the fund.
- Ask someone to act out scenes from the life of a famous Unitarian Universalist, with proceeds going to the fund.
- Organize a Health Fair where people can get their blood pressure checked and get information on nutrition and exercise. Ask people attending to make donations to the fund.
- Hold a contest for the Most Creative Fundraising Ideas, and use the winning idea to organize a fundraising event to raise money for the fund.
- Organize a sleepover, and ask parents and caregivers of those attending to make donations to the fund.
- Organize a bake sale, with proceeds going to the fund.
- Auction off the services of a handyperson who will make small repairs in people's homes.
- Ask people to donate CDs and DVDs, and hold a silent auction.
- Ask someone who knits or crochets to make a "GA afghan," and auction it off.
- Ask someone who's bilingual to offer six conversational sessions in a language other than English, and auction off the sessions.
- Organize a Dance Marathon, and ask dancers to get sponsors who will make donations to the fund.
- Create a "GA Curtain of Currency" by asking people to pin currency to a curtain hung in the social area of the congregation.
- Ask cooks to contribute Dinner for Four, with everything frozen in disposable containers. Auction off the dinners.
- Auction off mending and clothing repair services.
- Auction off a class in basic automotive maintenance services, including changing a tire and changing the oil.
- Auction off a "Get Organized!" session, with someone who will come to your home or office to help you get a room organized.
- Ask people to donate hotel room costs through particular hotel chains.
- Organize a class in how to play bridge, poker, Mahjongg, canasta, and other games, and ask participants to make donations to the fund.

# Butterflies and Bees

Butterflies are beautiful. They attract people, and conversations begin that would otherwise never have happened. As a result, surprising and welcome things begin to happen.

Bumblebees “constantly exercise their freedom to move,” according to Harrison Owen. They cross-pollinate things, “carrying ideas from one point to another, weaving a pattern of meaning from apparently disassociated elements, [and] enable a surprising level of synergy and creativity.”

# Principles of Open Space

- Whoever shows up are the right people.
- Whatever happens is the only thing that could happen.
- Whenever things start is the right time.
- When it's over, it's over.

# Law of Personal Mobility

If you thought you were in the right place, and you discovered that wasn't true, you should go to where the right place is for you at that moment.

Harrison Owen wrote, "If at any time you find yourself neither contributing nor learning, use your [personal mobility]. . . If you don't like it, if it isn't working for you, change it."