

What others are saying about "Inviting Organization"  
at [www.michaelherman.com](http://www.michaelherman.com)

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**What a treat... my first impression is BRAVO!**

*Tom Evons, Director, Youth Development Commission  
St. Joseph County, Indiana USA*

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**Amazing! ...it felt as if you were right here talking to me.**

*Beverly McCarthy, Ashford Group, Inc.  
Westchester, Ohio, USA*

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**Really a very beautiful gift to the world...a must read for  
facilitators and a nice piece of inspiration for me!**

*Chris Corrigan, Consultant/Facilitator  
Vancouver, British Columbia, CANADA*

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**What a marvelous gift you've created... a rich collection of  
Open Space stories and resources on the net...the generous  
sharing of a talented OS facilitator.**

**...delightfully disarming...a profound invitation to discover  
the powerful attraction inherent in living and working by  
invitation. ...marvelous, useful and well worth exploring.**

**Congratulations, Michael, on your fabulous, good work!  
...rich and enticing. Thanks so much for sharing yourself  
and your work so generously with all of us!**

*Metta Zetty, Kimble/Zetty Consulting  
San Antonio, Texas USA*

**...really enjoyed your website. You really are in your stories and invitations. You have used your own words, metaphors and experiences...that is powerful and it calls forth the same in others.**

*Helen Patterson from New Zealand*

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**Great work! Thank you!**

*Uwe Weissflog, Pathway Guidance  
Vohl-Marienhagen, GERMANY*

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**Ah, for a copy of your light-filled labyrinth  
on peach-colored paper,  
a cabin lost in these fiery oaks  
on a mountainside,  
and three days to read,  
spicy tuna rolls, trillium tea,  
and a swirling breath of leaves  
between each thought...**

**It really is marvelous and generous. I'll keep returning for tastes and will send many folks your way.**

*Chris Weaver, Poet Laureate, Worldwide Open Space <grin>*

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**...just finished perusing "Inviting Organization" as my sabbath exercise for today. Thank you for your generosity of spirit!**

*Winston Kinch, Consultant  
Toronto, Ontario, CANADA*

# *Inviting Organization*

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evolution is now and open space

...a collection of stories and resources that are shared freely as a browsable 'online book' at [www.michaelherman.com](http://www.michaelherman.com).

**Please email any comments or questions** to Michael Herman at <mailto:michael@michaelherman.com>.

**Thank you, and enjoy!**

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# ***Inviting Organization***

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evolution is now and open space

It's not quick or easy. It's not in the plan.  
And still, it cannot be ignored. *Please join us...*

***Michael Herman***

فearless

in open space

(fearless in open space)

# ***Inviting Organization***

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evolution is now and open space

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***About the Author/Editor***

## Many Gifts, One Story

Two years ago it all finally made sense. My working life and a good bit more from early on all seemed to 'click' into place in one grand story of what is happening now in us and our organizations. I filled dozens of flipchart pages with notes and pictures and lists and finally a 'table of contents' as it became clear that this story was big enough to be a 'book.'

For three days I walked around glowing, "I'm smart enough to write a book," I thought to myself. As Steve Martin says in the movie *The Jerk*, "I'm somebody now!" And then it hit me: I don't want to write a book! Books are smarter, more finished, more published and public than I really cared to be. I ran away, tried to play the whole thing off as a simple invitation and one-day conference. Three months later forty of us had a fantastic one-day conference in Open Space on a theme of 'Intentional Evolution at Work.' Still, it wouldn't let me go and what you hold now in your hands (or on your screen) is my latest compromise, my latest effort to appease the story gods.

And I'm not sure at all that it is a book. Not smart enough, not finished enough, not really published enough to meet my own standards for 'book.' It is, however, an open, honest, public offering of where I have been and how I am currently making sense of organization and open space. I've been calling it a 'workbook' and hoping that it will leave me be, to live and practice in peace, now that it's written down. I am hoping that we can all get quietly to work opening and holding space for each other, beyond so much explanation.

A workbook, toolbox, resource collection... call it what you will, but know right now that it's likely to raise more questions than it answers. It has been written in pieces, as I've had the time, energy, insight and inspiration. It is gift before product or conquest -- and flows directly from the great gifts I've received from teachers and colleagues and the people who have called me out of the blue to invite a conversation about this or that.

Steve Proudman, Harrison Owen, Sheila Isakson, Joan Murray, Linda Stevenson, Roger Breisch, Tom Mastandrea, Patricia Deer, Brian Bainbridge, Brian Reilly, Al Gustafson, Debbie Drake, Uwe Weissflog, John Fontana, Birgitt Bolton, Ralph Copleman, Barry Owen, Gretchen Neve, Amy Van Meter, Carol Peterson, Pam Winkler, Sheila McAnanly, Audrey Denecke, Bruce Mabee, Pam Elish, Karen Williams, Maggie Shreve, Anne Stadler, Ric Giardina, Dick Asimus, Peggy Holman, Joelle Everett, Michelle Field, Koos de Heer, Leslie D'Agostino, Patrick Brown, Dan O'Connor, Ian Hall, Peter Gordon, Kay Vogt, Lynn Pavlis-Jenkins, Sue Stratton, Juliet Miller, Lynn Breckenridge, Debbie Davis, Dimitri Topitzes, Pam Olson, Metta Zetty, Chris Weaver, Ruthann Prange, Merrelyn Emery, Jan Tramosch, Tim Hamilton, Lisa Kimball, Maureen McCarthy, and Julie Henderson have given primary insight and inspiration -- and witnessed these stories into reality. The writing of Ken Wilber and Angeles Arrien and the others quoted here have added essential shape. Bram Breure and Katie Brick showed up near the ending and made sure that it really did end, at least for now, though both threaten to make it a new beginning. Then, there are and always have been, my parents and family, who still work and learn, care and create with me.

Beyond these, there are the many, many others -- way too many to name -- who have supported me in a worldwide community of learning, beginning online at MetaNet in the Open Space Conference, at a handful of Open Space on Open Space and Organization Transformation conferences, at the Intentional Evolution conference I hosted three years ago and others that have followed, and online in the Open Space Practitioners' worldwide listserv community and the Zapchen online journal. Indeed, I have journeyed for years, in

a space held sacred by friends seen and unseen, known and unknown. I write and collect and offer all of what is here in honor of what they have known and done and invited and shared with me.

I've come to see the pieces gathered here as so many particles -- particular moments, if you will -- AND see them beginning to flow together as the story of one clear and surfable wave. I hope you'll appreciate the particles AND the wave. Moreover, I hope you'll find particles here that you can share with others, pieces that serve your many purposes, AND that you will do it in the comfort, confidence and ease that come from knowing that we are tapping into and surfing the crest of a great, rising wave.

When opening an event in open space, we acknowledge at the start that "when it's over, it's over." The flipside of this, of course, is that when it's not over, it's not over -- and we never really do know, when we get into something, how long it's going to take to deal with it. Likewise, only time will tell if this 'workbook' has appeased the forces that came calling me two years ago. For now, I offer it to you with the acknowledgment that it's not quick, not easy, not anything I planned, and also not something I could avoid or deny any longer.

*Please join me...*

Michael Herman  
[www.michaelherman.com](http://www.michaelherman.com)  
Summer, 2000

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# Opening Invitation

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There are three ways of trying to win the young. There is persuasion, there is compulsion and there is attraction. You can preach at them, but that is a hook without a worm. You can say "you must volunteer," and that is of the devil. Or, you can tell them, "you are needed," and that appeal hardly ever fails.

*--Kurt Hahn  
founder of Outward Bound Schools  
and father of adventure education*

## Opening Invitation in Organization

We've been reaching for the space beyond command and control for some time now. In many business organizations, we've come as far as 'the learning organization,' but as often as not this means preach and teach, plan and sell, ask then tell -- all watered-down versions of command and control. The literal meaning of 'education,' however, is 'to draw out' -- which starts to sound a lot like invitation to me.

I have been working, at various levels and in various ways, on this notion of managing (or just plain living) by invitation for some time now. I suppose it really started when I first encountered Open Space Technology, through Harrison Owen's OST: A User's Guide, about four or five years ago. In January, 1996, I met Harrison at a conference and attended the OST training workshop he did in Chicago later that year. For the last two years, I have been the lead organizer and host of the Chicago Open Space Tech workshop. To date, I've worked with corporate, church, community and youth groups in open space. In short, it's the simplest, most effective work I've ever done.

For me, Open Space has always been much more than a facilitation technique. I came to Open Space Technology from a background in business finance (healthcare finance and leasing) and experiential education (wilderness/adventure with outward bound schools). As a facilitator of team learning and experiential teambuilding activities, I immediately saw Open Space as a way to make the 'real work' the teambuilding initiative. Forget the ropes, blindfolds, metaphorical framings, color-coded t-shirts and the coffee mugs emblazoned with gung-ho, all-together-now cliches. Open Space Tech was a simple, powerful way to walk into any size of group or organization, focus attention on the most important business issues, and invite everyone to learn and contribute as much as they could to their successful resolution. For me, it eclipsed the need for teambuilding altogether and made organization-building a practical, powerful reality.

About the same time I discovered Open Space Technology, I came to understand that I was most productive, most effective and most happy on those projects where clients had called to invite me into their work, rather than because I had called them and sold a project. Seeing this, I resolved to make invitation the central focus of my personal and professional practice. I practiced listening for invitations -- from the little intuitive pulls we all get to the more explicit "why don't you come to Philadelphia with me... we could co-present at this conference there!" It quickly became clear that invitations come to those who also invite, so I practiced this as well. Open Space Technology was essential in this practice, as it allowed me to invite everyone (literally) in my personal and professional circles into conversation and action on the issues and questions most important to me. even when we didn't have enough time in these gatherings to do formal action planning, it was clear that everyone present had been touched, moved, changed by our time together. How then, could they not act differently going forward?

Indeed, in these times of rapid, even swirling change -- with complexity, urgency, diversity and the potential for conflict already high (and still on the rise) -- making sense, making meaning, making conversation qualifies as real work and creates real value. Invitations raise the awareness, speak the truth, gather the resources needed to get real results. invitations communicate intention, even to those who won't or can't be present. invitations offer new language for describing the truth of what's happening. Invitations get people moving in the same direction, at the same time -- because those people WANT to move that way. In this way, invitations turn managers into leaders, and invitees into managers. If we see Open Space Tech as one way to practice the leadership art of

invitation, is it any wonder that this technique has produced phenomenal results all over the world? When all else fails, it seems clear that everyone still works better and happier when they are invited into their work.

For me, the power of Open Space lies in its ability to invite invitation throughout an organization or community. It starts, simply enough, with one invitation extended by an individual or small group, to everyone and anyone they think will learn from and contribute to breakthrough progress on an important issue or set of issues. This invitation touches everyone who receives it and begins to inform their work. Those who choose to accept the invitation and attend the meeting are invited to post their own invitations to breakout sessions. This gives the original invitation a new level of detail and sets up the next conversations. After each breakout conversation, the participants document their conclusions and next intentions. The issues raised in these proceedings are clustered and prioritized, creating the next degree of detail, next set of invitations, and next round of working conversations. And in every conversation, participants automatically invite each other to see more, say more, and do more. Every round brings more people, more understanding, more alignment, and more action -- toward leadership and action everywhere.

An inviting story, for sure, but how do we DO it? The answer, it turns out, is deceptively simple. First, name your issue and say something about why you think it matters. Second, make a list of "guests" which includes everyone you need to REALLY deal with the situation at hand. Third, get a time, a space and some materials, including such technical items as an empty wall, chairs, markers, masking tape, and perhaps a few computers if you want to be fancy. Fourth, prepare for the care and feeding of the success story that you will create during this meeting. This might include plans to distribute proceedings copies, create a website, allocate funding, meet with senior managers, or hold followup meetings -- whatever it will take to keep this work moving forward. Summarize all of this in a crisp, clear and creative way and send it out -- and always, always, always -- be prepared to be surprised. Which is to say, try not to get your heart set on specific outcomes or solutions that are almost certain to be less than what the inspired creativity of your group will produce. Expect them to blow away expectations -- yours and theirs. This actually happens quite often in open space!

But, you say, breakthroughs happen all the time without Open Space Technology. And, yes, this is true. But if we look at what is really going on at the time of these breakthroughs, we find a lot of the the same basic conditions that we create naturally and intentionally with Open Space Technology. And at the heart of every breakthrough, large or small, we find people following their hearts, speaking their truth, opening to uncertain outcomes, and working with a spirit of learning, contribution and community. The energy of these people is inviting, without their trying or even noticing, the resources they need to make their breakthrough happen. It's only later on that they create policies, procedures and position papers to defend their gains and later still that their attention turns to strategic plans, whole system change and maximizing shareholder value. Eventually, however, comes burnout, turnover, restructuring, data overload, and a need to create something new in organization -- a need for an intentional return to the best of the old days, without sacrificing shareholder value -- a real need to pull it all, invite it all, together again.

This story is about pulling ourselves and our organizations back together again -- beyond learning, through open space, on our way to inspiration, along a path of invitation. After command-and-control, after preach and teach, after plan and sell, after ask then tell, we are discovering the simple power of "post-and-host" -- as in post strategic invitations and host strategic conversations. And in the open space beyond the learning organization, a new kind of organization is emerging -- the inviting organization, where inviting leadership literally calls us to the work we really want to do AND manages the work to be done, very

literally, practically and effectively, by the issuing of open invitations.

As we continue to shift from hierarchical monologue through planning dialogue to dynamic and diverse multilogue, everyone is invited to contribute and every voice matters. In line with this emerging multilogue, this story is really a collection of stories. I don't feel any desire to make them into one story that I call mine. Indeed, even the parts of this story that I have penned myself aren't *really* mine, as they merely echo and extend the work of so many others. My point, then, is that these stories, each one finished and whole in its own right, are OURS. My intention is to pull them into OUR conversation about who we are and where we're going next -- NOT to pull them into my story, or worse yet, my *argument* for how things should be. My hope is that these stories -- old and new, science and religion, workplace and community, metaphor and checklist, each and all -- when taken together, will give us fresh insights and new languages for working together in the open space, the grand uncertainty, the creative chaos, the passion bounded by responsibility and the spirited universe that we all already know as life.

These, then, are the stories that I come back to again and again, to help me appreciate where we've been as people and organizations, help me remember why i do the work i do, and help me understand how i can do my work in easier alignment with what is now emerging all around the world. The first section offers a taste of some of my own most important guides and mileposts. The snapshots included here are meant to suggest -- or should i say invite you to imagine and remember -- that we're all part of a flow that's bigger than we usually remember in the middle of an average workday, that how and where we work need not be kept separate from what we love, that what is most personal can be powerfully universal, and that the future we are creating is right now.

And now, even as all of this is starting to sink in and flow together for us, the organization of our world seems to be dissolving. We used to call it transition, as if it would all blow over. When it lingered on, we started calling it transformation and prepared ourselves for long-term consulting fees. Now, as we look back at where we've been, we can see that it's been evolution all along -- and we're beginning to see the real possibility of doing it more simply, more quickly and more intentionally. The second section, then, is all about this evolution of organization and the emergence of inviting leadership and inviting organizations. These, as we shall discover, are the stepping stones to truly inspired work.

In the third section, we'll introduce the practice of Open Space Technology. We'll see how opening space is one very powerful way to invite leadership everywhere and create inviting organization anywhere. The pieces included here and in the Appendix are used often by myself and others, as client handouts and personal reference materials. The Executive Summary piece has been translated into eight other languages. Taken together, the pieces in this section show how we can literally invite friends and colleagues, customers and other stakeholders to work with us to create more of what we want and need in any organization.

Finally, our fourth section closes this story with a new opening -- a personal invitation to become inviting leadership and to create inviting organizations -- intentionally surfing on the edge of an evolutionary spirit at work.

And so, you see, this story is itself one grand invitation. This is a space for reflecting on and reconnecting with our own most important stories -- and for preparing to invite more of them. It's an invitation to explore, experiment, experience and encourage others to join us - - in the open space beyond the learning organization, where inviting leaders and inviting organizations are evolving toward truly inspired performance at work. And in the spirit of inviting leadership and the inviting organization, it does what it is -- and is what it does. It is an opening, inviting story. And the being and the doing are one, and everywhere.

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# Inviting Evolution

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...work is love made visible.

*--Kahlil Gibran*

## Four Quartets

What we call the beginning is often the end  
 And to make an end is to make a beginning.  
 The end is where we start from. And every phrase  
 And sentence that is right (where every word is at home,  
 Taking its place to support the others,  
 The word neither diffident nor ostentatious,  
 An easy commerce of the old and the new,  
 The common word exact without vulgarity,  
 The formal word precise but not pedantic,  
 The complete consort dancing together)  
 Every phrase and every sentence is an end and a beginning,  
 Every poem an epitaph. And any action  
 Is a step to the block, to the fire, down the sea's throat  
 Or to an illegible stone: and that is where we start.  
 We die with the dying:  
 See, they depart, and we go with them.  
 We are born with the dead:  
 See, they return, and bring us with them.  
 The moment of the rose and the moment of the yew-tree  
 Are of equal duration. A people without history  
 Is not redeemed from time, for history is a pattern  
 Of timeless moments. So, while the light fails  
 On a winter's afternoon, in a secluded chapel  
 History is now and England.

We shall not cease from exploration  
 And the end of all our exploring  
 Will be to arrive where we started  
 And know the place for the first time.  
 Through the unknown, remembered gate  
 When the last of earth left to discover  
 Is that which was the beginning;  
 At the source of the longest river  
 The voice of the hidden waterfall  
 And the children in the apple-tree  
 Not known, because not looked for  
 But heard, half-heard, in the stillness  
 Between two waves of the sea.  
 Quick now, here, now, always --  
 A condition of complete simplicity  
 (Costing not less than everything)  
 And all shall be well and  
 All manner of thing shall be well  
 When the tongues of flame are in-folded  
 Into the crowned knot of fire  
 And the fire and the rose are one.

*by T.S. Eliot, from Four Quartets, Little Gidding V, (last verses)*  
 © 1943 by T.S.Eliot, © renewed 1971 by E.V. Eliot

## An Open Life

*About ten years ago, I had finished my MBA, landed the great finance job, bought the new car. Everything was running right on track, but a part of me wanted to run out of town. A new adventure was calling.*

*I followed that call into the wilderness, quite literally as an instructor with *Outward Bound*, an international adventure learning organization -- and I with a copy of *An Open Life*, Michael Toms' interview with mythology scholar Joseph Campbell, tucked in my pocket.*

*What follows here is a short excerpt from that text and one which provided important reassurance early on and now fairly sums up a decade or more of my own experience. It also provides a fitting beginning for our own adventures in the open space between the learning organization and truly inspired work.*

*Joseph Campbell was a brilliant scholar, writer, and teacher and one of the foremost interpreters of our most sacred traditions. Michael Toms is the host of *New Dimensions Radio* and a new-paradigm spokesperson in his own right.*

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Today, all historical circumstances are changing, and we no longer have the enclosing horizons that shut us in from knowledge of other people -- new worlds are breaking in on us all the time. It's inevitable that a person with any sense of openness to new experience will say to himself, "Now, this won't do, the way we're living." Do you see what I mean? And so, one goes out for one's self to find a broader base, a broader relationship.

On the other hand, there's plenty of reason for those who don't have this feeling to remain within the field because our societies today are so rich in the gifts that they can render. But if a person has had the sense of the Call -- the feeling that there's an adventure for him -- and if he doesn't follow that, but remains in the society because it's safe and secure, then life dries up. And then he comes to that condition in late middle age: he's gotten to the top of the ladder, and found that it's against the wrong wall.

If you have the guts to follow the risk, however, life opens, opens, opens up all along the line. I'm not superstitious, but I do believe in spiritual magic, you might say. I feel that if one follows what I call one's "bliss" -- the thing that really gets you deep in your gut and that you feel is your life -- doors will open up. They do! They have in my life and they have in many lives that I know of.

There's a wonderful paper by Schopenhauer, called "An Apparent Intention of the Fate of the Individual," in which he points out that when you are at a certain age -- the age I am now -- and look back over your life, it seems to be almost as orderly as a composed novel. And just as in Dickens' novels, little accidental meetings and so forth turn out to be main features in the plot, so in your life. And what seem to have been mistakes at the time, turn out to be directive crises. And then he asks: "Who wrote this novel?"

Life seems as though it were planned; and there is something *in* us that's causing what you hear of as being accident prone: it's something in ourselves. There is a mystery here. Schopenhauer finally asks the question: Can anything happen to you for which you're not ready? I look back now on certain things that at the time seemed to be real disasters, but the

results turned out to be the structuring of a really great aspect of my life and career. So what can you say?

And the other point is, if you follow your bliss, you'll have your bliss, whether you have money or not. If you follow money, you may lose money, and then you don't have even that. The secure way is really the insecure way and the way in which the richness of the quest accumulates is the right way.

...There's a kind of regular morphology and inevitable sequence of experiences if you start out to follow your adventure. I don't care whether it's in economics, in art, or just in play. There's the sense of the potential that opens out before you. And you have no idea how to achieve it; you start out into the dark. Then, strange little help-mates come along, frequently represented by little dark fairy spirits or the little gnomes, who just give you clues, and these open out. Then there is the sense of danger you always run into -- really deep peril -- because no one has gone this way before. And the winds blow, and you're in a forest of darkness very often and terror strikes you.

...Well, mythology tells us that where you stumble, there your treasure is. There are so many examples. One that comes to mind is in *The Arabian Nights*. Someone is plowing a field, and his plow gets caught. He digs down to see what it is and discovers a ring of some kind. When he hoists the ring, he finds a cave with all of the jewels in it. And so it is in our own psyche [and organizations!]; our psyche is the cave with all the jewels in it, and it's the fact that we're not letting their energies move us that brings us up short. The world is a match for us and we're a match for the world. And where it seems most challenging lies the greatest invitation to find deeper and greater powers in ourselves.

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*From An Open Life by Michael Toms. © 1989 by the New Dimensions Foundation. Published by Harper & Row, Publishers, Inc., 10 East 53rd Street, New York, NY 10022.*

## Critical Path

*At age 31, R. Buckminster (Bucky) Fuller found himself penniless (with a wife and small child to support) after he had lost all of his and a good deal of others' money in a failed business. Reflecting on his experiences, he discovered that he had been happy, effective and prosperous in direct relation to the number of people in whose interest he was working at any given moment.*

*Maximum happiness, effectiveness and prosperity, he reasoned, could only be achieved by working for ALL people, everywhere. A true scientist, he made the rest of his life an explicitly documented, public experiment designed to test this hypothesis, and seems to have done very well, indeed.*

*He is probably best known for his geodesic domes, but he also invented all kinds of other things that do more with less. His goal was nothing less than the total eradication of scarcity (and the conflicts created by the politics of scarcity) on this small planet, which he dubbed 'Spaceship Earth.' A true visionary, he once said, "I just invent things and then wait for humanity to discover the need for them."*

*The author of numerous books and articles in his lifetime, and countless patents and technical designs, he offers this in the opening of his last book, titled Critical Path. Sometimes the challenge of writing an invitation, trying to discover just what it is that we really want to happen, approaches the poet's challenge.*

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We all see things differently. Seeing is sensing. Hearing is sensing. Touching is sensing. Smelling is sensing. What each of us happens to sense is different. And our different senses are differently effective under ever-differing circumstances. Our individual brains coordinately integrate all the ever-different faculties. The integrated product of our multifold individual sensings produces awareness. Only through our sensings are we aware of the complementary "otherness."

Awareness of the "otherness" is information. The complex of successively experienced informations produces interweaving episodes -- and the complex of special-case-episode-interweavings produces the scenario that our brain's memory banks identify as our individual being's "life."

The way only-our-own, individual integrity of being responds spontaneously only to our own exclusive sensing of any given otherness episode is what I mean when I use the word *feeling*: How do I feel about life? How do I feel about it now? ...and again now? Our feelings often change. What do I feel that I need to do about what I am feeling?

One of the many wonderful human beings that I've known who has affected other human beings in a markedly inspiring degree was e.e. cummings, the poet.

He wrote a piece called "A Poet's Advice," which I feel elucidates why "little I," fifty-three years ago at age thirty-two, jettisoned all that I had ever been taught to believe and proceeded thereafter to reason and act only on the basis of direct personal experience. Cumming's poem also explains why, acting entirely on my own initiative, I sought to discover what, if anything, can be effectively accomplished by a penniless, unknown individual -- operating only on behalf of all humanity -- in attempting to produce

sustainingly favorable physical and metaphysical advancement of the integrity of all human life on our planet, which omnihuman advantaging task, attemptable by the individual, is inherently impossible of accomplishment by any nation, private enterprise, religion or other multipeopled, bias-fostering combination thereof.

### A POET'S ADVICE

A poet is somebody who feels, and who expresses his feelings through words.  
This may sound easy, but it isn't.

A lot of people think or believe or know they feel -- but that's thinking or believing or knowing; not feeling. And poetry is feeling -- not knowing or believing or thinking.

Almost anybody can learn to think or believe or know, but not a single human being can be taught to feel. Why? Because whenever you think or you believe or you know, you're a lot of other people: but the moment you feel, you're nobody-but-yourself.

To be nobody-but-yourself -- in a world which is doing its best, night and day, to make you everybody else -- means to fight the hardest battle which any human being can fight; and never stop fighting.

As for expressing nobody-but-yourself in words, that means working just a little harder than anybody who isn't a poet can possibly imagine. Why? Because nothing is quite as easy as using words like somebody else. We all of us do exactly this nearly all of the time - and whenever we do it, we are not poets.

If, at the end of your first ten or fifteen years of fighting and working and feeling, you find you've written one line of one poem, you'll be very lucky indeed.

And so my advice to all young people who wish to become poets is: do something easy, like learning how to blow up the world -- unless you're not only willing, but glad, to feel and work and fight till you die.

Does this sound dismal? It isn't.

It's the most wonderful life on earth.

Or so I feel.

-- e. e. cummings

*Fuller also offers the following, as if to remind us that writer's block is no longer an excuse -- or even an option. Can you imagine getting such a letter as a ten-year-old? ...and so good that we've still got some time left to work...*

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Each year I receive and answer many hundreds of unsolicited letters from youth anxious to know what the little individual can do. One such letter from a young man named Michael -- who is ten years old -- asks whether I am a "doer or a thinker." Although I never "tell" anyone what to do, I feel it quite relevant at this point to quote my letter to him explaining what I have been trying to do in the years since my adoption of my 1927-inaugurated self-disciplinary resolves. The letter, dated February 16, 1970, reads:

Dear Michael,

Thank you very much for your recent letter concerning "thinkers and doers."

The things to do are: the things that need doing: that *you* see need to be done, and no one else seems to see need to be done. Then you will conceive your own way of doing that which needs to be done -- that no one else has told you to do or how to do it. This will bring out the real you that often gets buried inside a character that has acquired a superficial array of behaviors induced or imposed by others on the individual.

Try making experiments of anything you conceive and are intensely interested in. Don't be disappointed if something doesn't work. That is what you want to know -- the truth about everything -- and then the truth about combinations of things. Some combinations have such logic and integrity that they can work coherently despite non-working elements embraced by their system.

Whenever you come to a word with which you are not familiar, find it in the dictionary and write a sentence which uses that new word. Words are tools -- and once you have learned how to use a tool you will never forget it. Just looking for the meaning of the word is not enough. If your vocabulary is comprehensive, you can comprehend both fine and large patterns of experience.

You have what is most important in life -- initiative. Because of it, you wrote to me. I am answering to the best of my capability. You will find the world responding to your earnest initiative.

Sincerely yours,

Buckminster Fuller

The political and economic systems and the political and economic leaders of humanity are not in final examination; it is the integrity of each individual human that is in final examination. On personal integrity hangs humanity's fate. You can deceive others, you can deceive your brain-self, but you can't deceive your mind-self -- for mind deals only in the discovery of truth and the interrelationship of all the truths. The cosmic laws with which mind deals are noncorruptible.

Cosmic evolution is omniscient God comprehensively articulate.

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*From Critical Path by R. Buckminster Fuller. © 1981 by R. Buckminster Fuller. Published by St. Martin's Press, New York.*

## A Brief History of Everything

*When Ken Wilber was just 23 years old, he wrote a book called The Spectrum of Consciousness, which was immediately hailed as a masterpiece for the way it integrated Eastern and Western thought. Nearly thirty years and many, many books later, he wrote something called A Brief History of Everything, which I call the 'easy access' version of his encyclopedic Sex, Ecology, Spirituality.*

*Brief History and more recently The Marriage of Sense and Soul, have transformed the way I look at just about...well, everything. Here are my favorite few pages from Brief History. Wilber wrote Brief History and this mind-blowing piece of it as one long interview, which I've adapted into narrative form to give it some borders. Enjoy!*

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Evolution has a direction, yes, a principle of order out of chaos, as it is commonly phrased. In other words, a drive toward greater depth. Chance is defeated, meaning emerges -- the intrinsic value of the Kosmos increases with each unfolding. Evolution has a broad and general *tendency* to move in the direction of: increasing complexity, increasing differentiation/integration, increasing organization/structuration, increasing relative autonomy, increasing telos.

This doesn't mean that regression and dissolution don't occur -- they do. And it doesn't mean that every short-term development must follow those directions. As Michael Murphy says, evolution meanders more than it progresses. But over the long haul, evolution has a broad telos, a broad direction, which is particularly obvious with increasing differentiation -- an atom to an amoeba to an ape!

All of [the] scientific descriptions [of evolution] can generally be summarized as: the basic drive of evolution is to increase depth. This is the self-transcending drive of the Kosmos -- to go beyond what went before, and yet include what went before, and thus increase its own depth.

Consciousness and depth are synonymous. [Everything has] some degree of depth, however minor, because there is no bottom. And with evolution, depth becomes greater and greater. However much depth atoms have, molecules have more. And cells have more depth than molecules. And plants have more than cells. And primates more than plants. There is a spectrum of depth, a spectrum of consciousness. And evolution unfolds that spectrum. Consciousness unfolds more and more, realizes itself more and more, comes into manifestation more and more. Spirit, consciousness, depth -- so many words for the same thing.

Since depth is everywhere, consciousness is everywhere. Consciousness is simply what depth looks like from the inside, from within. So, depth is everywhere, consciousness is everywhere, Spirit is everywhere. And as depth increases, consciousness increasingly awakens, Spirit increasingly unfolds. To say that evolution produces greater depth is simply to say that it unfolds greater consciousness.

Spirit is *unfolding* itself in each new transcendence, which it also *enfolds* into its own being at the new stage. Transcends and includes, brings forth and embraces, creates and loves, Eros and Agape, unfolds and enfolds -- different ways of saying the same thing.

So we can summarize all this very simply: because evolution *goes beyond* what went before, but because it must *embrace* what went before, then its very nature is to transcend and include, and thus it has an inherent directionality, a secret impulse, toward increasing depth, increasing intrinsic value, increasing consciousness. In order for evolution to move at all, it must move in those directions -- there's no place else for it to go!

Because the universe has direction, we ourselves have direction. There is meaning in the movement, intrinsic value in the embrace. As Emerson put it, we lie in the lap of immense intelligence, which by any other name is Spirit. There is a theme inscribed on the original face of the Kosmos. There is a pattern written on the wall of Nothingness. There is a meaning in its every gesture, a grace in its every glance.

We -- and all beings as such -- are drenched in this meaning, afloat in a current of care and profound value, ultimate significance, intrinsic awareness. We are part and parcel of this immense intelligence, this Spirit-in-action, this God-in-the-making. We don't have to think of God as some mythic figure outside of the display, running the show. Nor must we picture it as some merely immanent Goddess, lost in the forms of her own production. Evolution is both God and Goddess, transcendence and immanence. It is immanent in the process itself, woven into the very fabric of the Kosmos; but it everywhere transcends its own productions, and brings forth anew in every moment. Transcends and includes.

And we are invited, I believe, to awaken as this process. The very Spirit in us is invited to become self-conscious, or even, as some would say, superconscious. Depth increases from subconscious to self-conscious to super conscious, on the way to its own shocking recognition, utterly one with the radiant All, and we awaken as that oneness.

What do you think? Are the mystics and sages insane? Because they all tell variations on this same story, don't they? The story of awakening one morning and discovering that you are one with the All, in a timeless and eternal and infinite fashion.

Yes, maybe they are crazy, these divine fools. Maybe they are mumbling idiots in the face of the Abyss. Maybe they need a nice understanding therapist. Yes, I'm sure that would help.

But then, I wonder. Maybe the evolutionary sequence really is from matter to body to mind to soul to spirit, each transcending and including, each with a greater depth and greater consciousness and wider embrace. And in the highest reaches of evolution, maybe, just maybe, an individual's consciousness does indeed touch infinity -- a total embrace of the entire Kosmos -- a Kosmic consciousness that is Spirit awakened to its own true nature.

It's at least plausible. And tell me: is that story, sung by mystics and sages the world over, any crazier than the scientific materialism story, which is that the entire sequence is a tale told by an idiot, full of sound and fury, signifying absolutely nothing? Listen very carefully, just which of those two stories actually sounds totally insane?

I'll tell you what I think. I think the sages are the growing tip of the secret impulse of evolution. I think they are the leading edge of the self-transcending drive that always goes beyond what went before. I think they embody the very drive of the Kosmos toward greater depth and expanding consciousness. I think they are riding the edge of a light beam racing toward a rendezvous with God.

And I think they point to the same depth in you, and in me, and in all of us. I think they are plugged into the All, and the Kosmos sings through their voices, and Spirit shines through their eyes. And I think they discolse the face of tomorrow, they open us to the heart of our

own destiny, which is also already right now in the timelessness of this very moment, and in that startling recognition the voice of the sage becomes your voice, the eyes of the sage become your eyes, you speak with the tongues of angels and are alight with the fire of a realization that never dawns nor ceases, you recognize your own true Face in the mirror of the Kosmos itself: your identity is indeed the All, and you are no longer *part* of that stream, you *are* that stream, with the All unfolding not around you but in you. The stars no longer shine out there, but in here. Supernovas come into being within your heart, and the sun shines inside your awareness. Because you transcend all, you embrace all. There is no final Whole here, only an endless process, and you are the opening or the clearing or the pure Emptiness in which the entire process unfolds -- ceaselessly, miraculously, everlastingly, lightly.

The whole game is undone, this nightmare of evolution, and you are exactly where you were at the beginning of the whole show. With a sudden shock of the utterly obvious, you recognize your own Original Face, the face you had prior to the Big Bang, the face of utter Emptiness that smiles as all creation and sings as the entire Kosmos -- and it is all undone in that primal glance, and all that is left is the smile, and the reflection of the moon on a quiet pond, late on a crystal clear night.

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*From A Brief History of Everything by Ken Wilber, © Copyright 1996. Published by arrangement with Shambhala Publications, Inc., Boston.*

# Breathtaking Transformation

(a story of opening)

my grandma died last week. she was 82 years old, but didn't know it. she often struggled to recall our names when we appeared in her room. recently, when we asked her if she knew where she was, she looked around her room in the intensive care unit, white sheets, intravenous pumps, electrodes wired to beeping monitors, "i'm in my dining room."

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*This is the story of my maternal grandmother's last days. But, for me, it's about the amazing transformations that are part of every lifetime. It's about doing the things we must, but finding ways to do them in the peace of who we really are.*

*I think that her experience and this story are important because they give us all an opportunity to observe our own personal reactions to pain and suffering, fear and uncertainty, growing confusion and loss of control -- AND the possibility for peace, in the midst of it all.*

*For me, this experience captures the essence and spirit of the work I want to do, with individuals and organizations, in times of swirling change and breathtaking transformation.*

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since she was diagnosed with alzheimers disease a few years ago, we'd grown accustomed to our own incapacity to really connect, to truly be with her, to help her in any significant way. "how's grandma?" we'd ask. "she's pretty confused..." is usually how the report began. then, about a month ago she forgot that she couldn't walk without her walker. she ventured off without it and fell. she broke two large bones, necessitating an ambulance ride and several invasive medical procedures which seemed to propel her on a final crossing from confused into lost.

but the journey downward wasn't without its wonderful moments. one day toward the end, after a difficult attempt at mandatory physical therapy, she laid back and closed her eyes, "oh-boy, i just want to go to sleep" she groaned

to which mom responded, "that's okay, you can do that, mom"

"no, i mean for good" she reinforced.

"i know. you can do that, mom"

"oh," she said, opening her eyes. "really?" and closing her eyes again, she continued, "could i have a little vanilla ice cream before i do?"

in her lifetime, she'd known desperate odds many times before -- childhood diseases, multiple cancers and surgeries, crippling arthritis, months of unexplained blindness, and intense loneliness after my grandfather died. she always seemed to meet them with willful acceptance and renewed determination to do what she could for others, even as her strength and capabilities left her. doctors who knew her history didn't like to make predictions.

but this last time was, of course, to be different. lost in the complexity of so many of her internal systems complaining at once, her thoughts and communication deteriorated until we could understand almost nothing of what she was saying, except for key phrases like "oh, boy!" "oh my god!" and "please help me." these always came through loud and clear. she really wanted out of this world, but giving up was something she'd never allowed herself to practice. and so, after three weeks of degeneration, she'd curled herself up in her bed, the muscles of her neck, chest and stomach tightening with fear and tension, an involuntary retreat from overwhelming uncertainty. she just couldn't let go.

her troubles reached a sort of climax the last monday night of her life. after weeks of downtime, her lungs were filling with fluid, she was falling behind on her breathing, and she was scared. when she opened her eyes, she could barely see us, but reached out for help, instinctively. it's hard to know what to do at those moments when you so want to help but have to admit that some things are beyond our control. small doses of morphine helped calm her a little, but gave no real comfort. we took turns sitting with her all night, following her breathing, reassuring where we could.

at dawn, she was restless and anxious, due for the next morphine shot. i recognized the tension in her body as an extreme form of the tightness i feel in my own chest and gut when i am under stress. i sighed a big sigh for her, "aaaahhhhhhh." it gave her pause, a break in the steady stream of quietly desperate murmuring "...oh my god, oh my goodness..." i sighed again, "aaaahhhh," releasing my own tension. soon she was echoing me eagerly on every exhale. mom picked up on it and started "the sleep song," a cadence of "aaahhs" that grandma used, to rock all of the babies she loved to sleep. "ah-ah-ah-ah-ah, ah-ah-ah-ah-ah..." grandma echoed our humming all day long, whenever she'd get anxious or restless, we'd hum with her and she'd breathe easier, straighten out, loosen up.

it was better than morphine -- for all of us. it was real conversation, real connection, the likes of which we hadn't had for years. the truth was finally clear enough, the need strong enough, and the message simple enough for us to connect with her. in one syllable, "aaahhh," which means peace, we said we saw and heard her pain, remembered her love, and reminded her that it was still deep inside of her, beneath the pain and fear. with that same syllable in response, she seemed to say, "i hear you trying to help, i'm doing as you say, and it's working." it filled the room with a new energy. even the staff took note.

we'd managed to keep them from turning on the bright lights, sticking her with needles and making other customary, but now unnecessary, intrusions into her space. by tuesday evening, however, her bed had to be changed. the process, done as gently as possible, still proved tremendously upsetting for her. after hours of peace, she was now a tightened little knot again, gasping for breath, crying out for help. i called mom back to the hospital, sure the end was near. but, after several hours of rosaries, prayers, singing, crying, releasing and even humming, she remained as knotted as ever.

worn out, mom looked across the bed at me, "she hasn't eaten or stood up for 25 days, where can she be getting the strength to do this?" i paused and then it flashed for me. "maybe she's getting it from us," i smiled, "maybe we should go take a walk." we restated our final goodbyes and left her room. we got a snack, resaid our goodbyes and left her to finish her work on her own. we'd finally accepted that she could not be coached, sung, prayed or hummed into this transformation. she should have been dead years ago, should have gone this morning, certainly she would finish this up tonight.

given her history, it wasn't a total surprise when she lived through tuesday night -- but nobody could have predicted or even imagined the rest. none of the doctors and nurses had

ever seen anything like it, but mom could hear it clearly, from down the hall, before she even reached grandma's room on wednesday morning. "ah-ah-ah-ah-ah, ah-ah-ah-ah-ah...." she walked in the room, sat down at the bed and listened,"ah-ah-ah-ah-ah, ah-ah-ah-ah-ah."

"hi mom, i'm here, mom."

no response, but the chanting, "...ah-ah-ah-ah-ah, ah-ah-ah-ah-ah...." with every exhale.

in a minute, there came a short pause which mom filled in with her own chanting. grandma wrinkled her eyebrows in a little scowl, eyes still closed. in a minute, another pause and mom tried again, getting the same grumpy little scowl, that seemed to say "it's my song, my life, my death, and i can do it by myself, thank you very much."

and so, with eyes closed and lungs nearly full to drowning, she chanted her sleep song without accompaniment, without interruption, all day and all night, wednesday, thursday and friday. by friday evening you couldn't hear her down the hall anymore, but the sound continued loud enough to be heard in her room and peacefully enough to be described as singing by one listener. as she chanted and sighed, she softened and relaxed her whole body until she finally let go, just after midnight, on good friday night.

she had reconnected with her own deepest love and caring - her own most important work and calling - beneath the fear, the pain and the uncertainty of the present moment -- and beyond the limits of her physical circumstances.

sometimes the simplest things can lead in the most amazing directions, the most personal is most universal, and the most obvious is hardest to remember. when seen in this light, the moment of leadership becomes a personal quest to remember how to do amazing things with ease.

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# Evolving Organization

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If a living system is unhealthy, the way to make it more healthy is to reconnect it with more of itself.

*--Francisco Varela, Biologist*

## A Brief History of Evolution at Work

Sages and mystics the world over have been teaching for centuries and centuries that all of life moves and is moving -- from matter to body to mind and on to soul and the highest realms of spirit. Now scientists are confirming the same. And every one of them, each in his or her own way, keeps inviting us to keep exploring, keep moving and practicing, keep growing and evolving toward those higher spaces.

That's all well and good, but in the meantime, there's work to be done. It's just that simple, or so it used to be. The business of business was business. So was the wisdom of the day from President Calvin Coolidge. But somewhere along the way, things have gotten rather muddled and complex.

When things first started to go awry, we called it "transition," under the comforting impression that if we made just this one big move, all would soon be returning to normal. When one transition begat another and another and another, we renamed it "transformation" and hunkered down for the long, dark winter. In time, we admitted openly in conference rooms and strategic plans that this was a whole lot deeper than we'd bargained for. Still, we reasoned, it was going to end, was going to get better. Normal was out there somewhere. What's more, it was going to be that much sweeter (eventually) for our pains and struggles now. More and more, however, it seems that we've worked our way into a case of good news, bad news. Which do you want first?

The good news is that work really can be a whole lot easier, inspiring, open and flowing. The bad news is that it already is but most people have yet to experience it that way. This story then, is about beginning to make the connections between the wisdom of sages, mystics, poets, and scientists -- eastern, western and native teachings -- in a language that everyone can use at work and all of us can practice everyday. Indeed, in words and structures we already use, but may not yet fully appreciate what they really mean and how they really work.

What we've wrestled with as "transformation" is giving way to "evolution." Indeed, as we look back from here, we can see that it's been evolution all along. Lo, and behold! *Evolution is normal!* And again, there is good news and bad news. The bad news is that unlike transition and transformation, evolution really is too big to kid ourselves about ever escaping, ever returning to a secure sort of "normal." The good news, however, is that this new wave can be surfed -- and it can be fun.

And so, our newest, biggest challenge is fast becoming one of paying attention and making sense, in words, pictures and patterns, of what pops up now -- and now, and now. It's all about balancing, conversing, constructing and aligning atop this evolutionary wave of new information and events.

And as we look around, this notion of evolution in organization has shown up in all kinds of places. But just what kind of organizations are we evolving or surfing into? How are we supposed to lead ourselves there? And how are we to manage ourselves if (and when) we ever actually get there? It seems that the answers we seek must now lie somewhere between the wisdom of the sages and the realities of our everyday working and living.

## The Inviting Organization Emerges

*This is one story of evolution at work, my story of the inviting organization. It's the integration of a dozen or so years of study and practice in organization -- crunching numbers, building teams, redesigning process, and opening space. It's a practical mapping of the old, deep stories recounted by anthropologist Angeles Arriens and philosopher Ken Wilber and the modern business stories developed by organization development pioneers Fred and Merrelyn Emery, Open Space Technology originator Harrison Owen, and the new economy gurus at Fast Company magazine. Taken together these stories invite us to take a satisfying look back, a hopeful look forward and a practical view of our present, as the inviting organization is emerging in open space. Please join us...*

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### **In Search of the Next Great Strategic Question**

In 1999, the cover of Fast Company magazine, a leading voice of the so-called 'new economy,' proclaimed "How Digital Is Your Company?" as the next great strategic question. According to their story, business strategy used to be as simple as "What business are you in?" As organizations evolved, "What's your business model?" became the definitive question. Today, it's all about getting digital.

These questions matter, they said, because every time we get an evolutionary click from one question to the next, everything throughout the organization needs to evolve together, to answer it. Specifically, they said that organizations need to rethink the "four basics of business" which they named as (1) attracting talent, (2) segmenting and selling customers, (3) using speed, and (4) financing operations.

Their newest and greatest strategic question, "How digital are you?" demands a rethinking of how we use information and technology to drive the flow of goods and services. In their story, however, they held up examples like McDonald's, Wal-Mart and Intel that were working this digital question 15 years ago. "How old is this story?" is the question that came to my mind -- followed closely by "If this is a 15-year-old strategic question, then what's the NEXT great strategic question? What are the next leading-edge organizations asking now?"

At the time this story came out, I was already deep into the work of mapping my own understanding of evolution in organization, with the overlapping stories of first-peoples anthropologist Angeles Arrien, Open Space Technology originator Harrison Owen, organization developers Fred Emery, Merrelyn Emery and Eric Trist, and philosopher Ken Wilber. If these wise people, and the map I was making from their stories, were to be of any use at all, they had better point me to the next great question.

My map was (and is) a four-quadrant, five-stage diagram of evolution in organization. Fast Company's four basics of business mapped quickly and easily into my four quadrants. Their three strategic questions fit perfectly with my first three stages of evolution. And when I looked into my own fourth stage, the next great strategic question, "How inviting is your organization?" was right there waiting for me, jumping up and down begging to be asked.

Since then, this evolutionary map has been invaluable in orienting myself to what is going on in all kinds of organizations. Along the way, I've shared it in conversation with clients

and colleagues. It's been universally understood and appreciated, even by friends with no training in business or practice in organization. While the map may appear either overly simple or overwhelmingly complex at first glance, the story itself has been easily understood by those who've heard it over the phone and other places where the actual map never was drawn.

What follows here is my story of evolution at work. It begins with the story of the map, which pulls together the old stories of spirit and new stories of business and organization. Along the way, the inviting organization will emerge and will be linked to a number of other developments in organization. So it will live in the context of other real stuff, not just in the context of my little map. Finally, we bring Open Space Technology into the picture, noticing its easy alignment and ready support for the emergence of inviting at work.

As I look back, this story gives me a deeper appreciation for where we've been in organization and real satisfaction that nothing's been wasted. Looking ahead, I find a hopeful clarity and confidence that all of this swirling does indeed work out in the end. All of which helps me now, in the present, to rest a little easier, stand a little readier, and invite a little more evolution at work. Please join me...

### **Evolution in Four Dimensions**

This story starts with the work of philosopher Ken Wilber, who was already being hailed as the greatest American philosopher when he was just 23 years old. He earned this acclaim for his first book, Spectrum of Consciousness. It was the first successfully seamless integration of earthy native spirituality, rational western science and transcendent eastern wisdom. It was also the first of a long line of Wilber writings offering various spins on this same seamless theme. I read his Brief History of Everything first and it got me thinking. Two years later I heard him speak and was moved to read his Marriage of Sense and Soul. Halfway through that second book this picture of evolution in organization exploded into my consciousness. I put down the book and started writing.

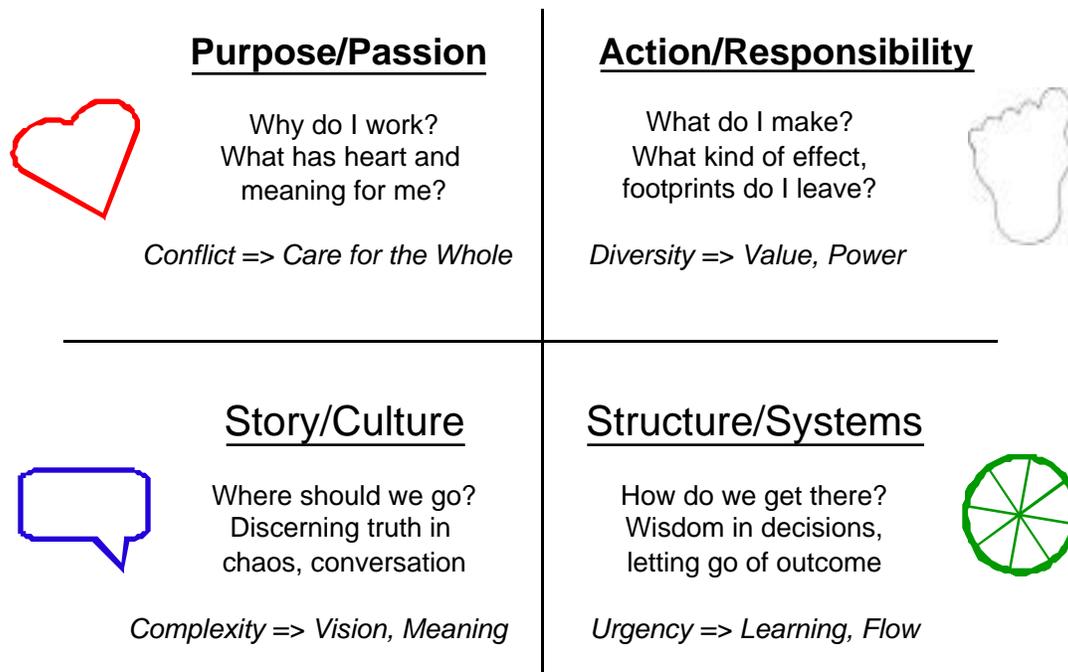
I started with Wilber's basic two-by-two matrix, a four quadrant map, that has at its core two basic tensions or spectrums of consciousness, shown as intersecting, perpendicular axes. The first axis stretches from inside to outside, subjective to objective. In organizational terms, every organization has a subjective, depends-on-who-you ask, open-to-interpretation and re-interpretation, unmeasurable-but-undeniable, story-based, deeper meaning INSIDE and an objective, observable, measurable, put-it-in-a-powerpoint-pie-chart, pass-it-around-the-room, obviously real OUTSIDE. We use soft, interpersonal skills to deal with the inside stuff of people and culture. We use hard data skills to deal with the outside stuff of decision-making and action.

The second axis is equally clear. It runs from the one to the many, the individual to the collective, the personal to the organizational. Every organization exists simultaneously as a single, whole entity AND has many, many individual parts or people. Leadership skills are about the personal, about passion and responsibility, about what do I want and what am I willing to do about it. Strategy is a bigger, organizational form of the same stuff, about culture and decision-making, about where do we want to go and how are we going to get there.

When Wilber lets the inside and outside play with the one and the many, he generates four quadrants, what he calls the four dimensions of evolution. Translated into organizational terms, we see that our work really is pulling us in four directions at once! Wilber's four dimensions are consciousness, culture, social structure and behavior. Consciousness is the

internal, individual dimension, what we all know on the inside, for ourselves. Culture is the collective form of that, the stories that we make to hold us together and tell us what is good and bad, right and wrong, sought and avoided. Social structure is the outside, collective, the outside of structure, it's what we literally construct based on our cultural beliefs. Finally, behavior is the individual, outside dimension, the individual actions taken within the social structures, what each of us actually does about the things that we are conscious of and care about.

## Dimensions of Organization



Primary References: Owen, Wilber, Arrien

Translating this into more organizational terms, consciousness becomes personal passion or intention. Culture and structure need no translating, as long as we remember that culture is all about story and structure is about how we make decisions and move forward. Finally, behavior becomes action, the bottom lines at any standard cocktail party and any organization... what do you DO? and how do you get people to DO what is required at work? So we really are being pulled in four directions at work, continually reconciling and aligning what I love and care about as an individual with the plans and policies of who WE say we are as a culture, with the decisions, choices and options WE have now in the current organizational structure, with what I am willing to take personal responsibility for DOing about all of it. No wonder we come home tired all the time!

If we turn now the wisdom of first-people nations through the ages, as told by Angeles Arrien in her book *The Four-Fold Way*, the advice we get about this is simple and clear: show up, pay attention to what has heart and meaning, speak your truth, and let it go. In her book, *The Fourfold Way*, Arriens links these four simple practices with four hero

archetypes, four meditations, and four human resources. All of these map easily into the Wilber dimensions.

Showing up is the work of the warrior archetype, who practices standing meditation, developing the human resource of power. Map this to individual responsibility and action, where we exercise our individual power to take a stand and be accountable. Paying attention to what has heart and meaning is the work of the healer archetype, whose meditation is lying down and resource is love. Map this to individual purpose and intention, the things we love and in which we rest. Telling the truth is the work of the visionary, who does a sitting meditation and whose resource is vision. Map this to culture, story and planning and vision in organization. And finally, the letting go of the outcome is the work of the teacher, whose meditation is moving, walking and whose resource is wisdom. Map this to our capacity to make decisions and move within and beyond the structure of the organization.

Returning to the recent Fast Company story that prompted this journey, we can now appreciate just how basic their "four basics of business" really are. Attracting talent is about creating organizations that people can put their hearts into, where they can find a reason to work, something they love and can rest into. Segmenting and going after customers is about creating a vision, a story that customers can literally buy into. Using speed as a competitive advantage is about structuring for movement, letting go of control, and allowing more distributed, front-line decision-making. And finally, financing the operation is about generating power or value through responsibility and action.

### **Evolution in Open Space**

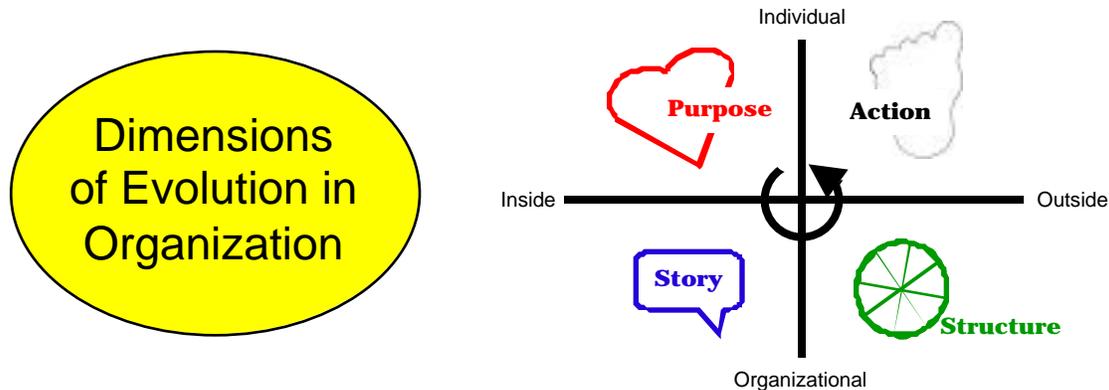
So far, we've seen that our oldest stories of spirit are aligned with some of our newest stories of business. Now we come to the practice of Open Space Technology, as discovered and disseminated by Harrison Owen. Given his experience in the Peace Corps with the tribes of West Africa, his study of Ken Wilber, his friendship with Angeles Arrien and his deeply practical approach to business of all kinds, it's not surprising that Harrison's contribution to evolution in organization would directly address each of the dimensions of evolution at work AND the challenge of moving in all of them at once.

When he looked back on the first handful of years of practicing Open Space Technology, Harrison concluded that Open Space works best when four key conditions are present: when the tasks to be done are highly complex, when the people who are needed to do them are personally, professionally, or simply geographically diverse, when there is real or potential conflict, and when the decision time was yesterday.

Keeping up with our picture then, map the conflict to our first quadrant, as it's just passion in disguise. It just means people care enough to disagree, but not yet enough to hold the larger whole in their hearts. Map high complexity to the absence of vision, as we don't yet see how we all work together, can't yet see the plan. Map the decision-making lag to questions about whether so-and-so is ready to let go of thus-and-such, the structure's not ready to move. And finally, map the diversity as deviance or differences of opinion as block creative new action and new value, remembering that environmentally and financially, diversification is power.

To look at why it works so well when the levels of conflict, complexity, urgency and deviation are high and rising, we have only to look at what it invites people to do. First it invites leaders to invite leadership, from all sides, to sit together as one circle, and to give their attention to this larger whole. Next the big, empty bulletin board wall invites all to

speaking their truth, write it down, and post it so that others who share the same passions can be found and engaged. Then the open marketplace invites everyone present to move and move and move again, constantly letting go of groups and ideas, in order to maximize learning (wisdom) and contribution (value). Finally, it is the responsibility of everyone who led a breakout session to document what happened so that the action can continue.



Business Basics (1)	Attract Talent	Sell Customers	Use Speed	Finance Ops
The Fourfold Way (2)	Pay Attention	Tell the Truth	Let it Go	Show Up
Leadership Roles (2)	Healer	Visionary	Teacher	Warrior
Human Resources (2)	Love	Vision	Wisdom	Power
Dimensions of Evolution (3)	Consciousness	Culture	Social Structure	Behavior
<b>Dimensions of Organization (4)</b>	<b>Purpose/Passion</b>	<b>Story/Culture</b>	<b>Systems/Structure</b>	<b>Action/Acc'tability</b>
Conditions for OST (5)	Conflict (Passion)	Complexity	Urgency	Diversity
Outcomes of OST (5)	Leadership	Vision	Community	Management
Mechanisms of OST (5)	Gathering Circle	Bulletin Board	Marketplace	Breathing
Preparation for OST (4)	Invitation List	Theme/Invitation	Space/Logistics	Documentation

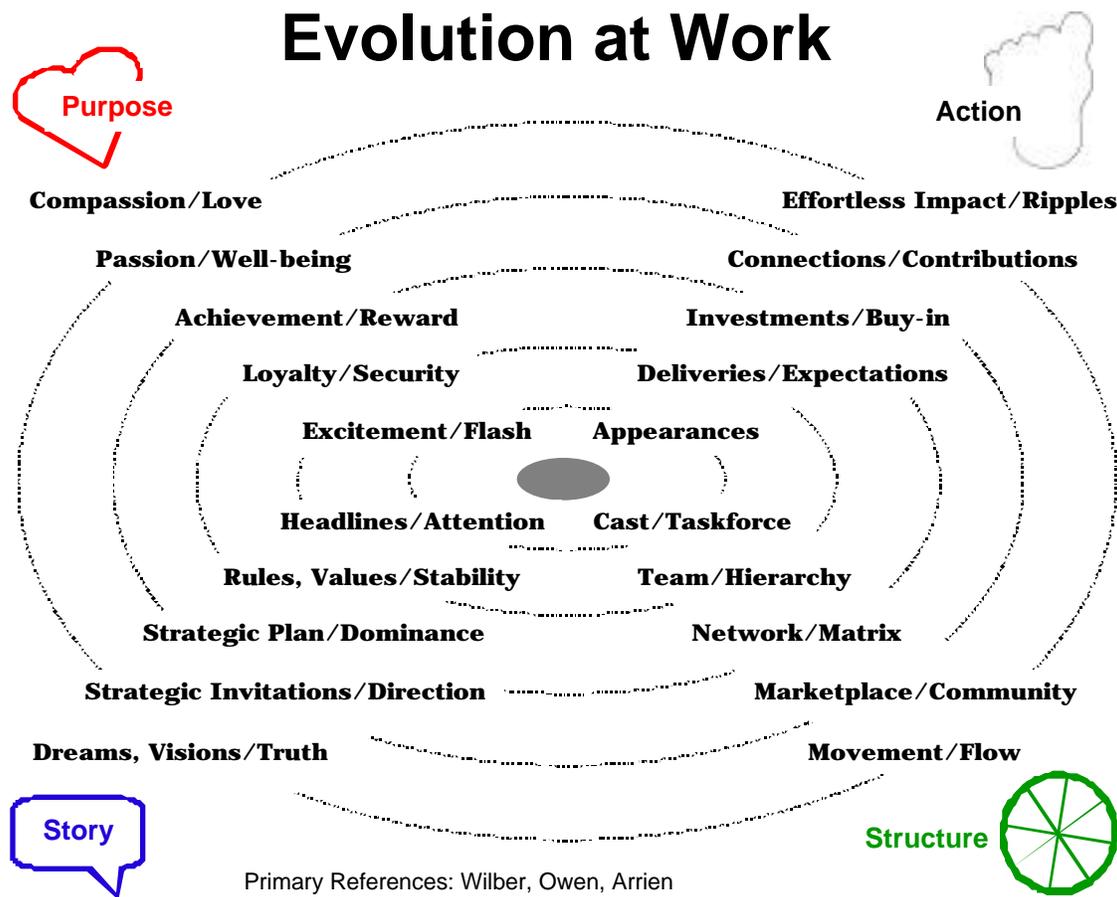
(1) Fast Company (2) Arrien (3) Wilber (4) Herman (5) Owen

What's more, the preparation for any open space event has four requirements: the invitation, the invitation list, the space/time logistics, and a plan for publishing the proceedings. The invitation list is about attracting the necessary talent. The invitation document is the vision that brings them together. The logistical opening of the space and time for meeting give people a chance to let go of regular routines and speeds the flow of work. Finally, the plan for publishing the proceedings takes responsibility for action afterward. In the end, it seems that the practice of opening space naturally addresses the four dimensional challenge of evolution AND the four basics of business.

To paraphrase Harrison's own story on this, leadership emerges as passion bounded by responsibility, the vision emerges on the wall, the community moves together in the marketplace and the management is a 'no-brainer,' because the whole thing is sprung from leadership and responsibility. He never designed it to do this, indeed Harrison is the first to say that he didn't design it or create it at all... but discovered it, in the process of trying to make the work of managing one particular conference event amazing AND easy.

## Evolution in Organization

To summarize our progress here then, we've discovered that evolution, Open Space, and apparently everything else, is four dimensional, four directional, even four seasonal if you let them move in that way. But as we click through those seasons, where do we go and what do we become? I hear the echoes of kids in the backseat... when are we gonna get there? Where is the inviting organization? How much longer 'til we get there? Well, I'll show you the map...



...keeping in mind that no map is RIGHT, but that some maps are helpful, we'll tie up these quadrant stories and show how they evolve together, as we resolve bigger and bigger conflicts, see our way through increasing complexity, move faster and easier in organization, and act more and more responsibly in larger, more diverse circles. What follows is a nutshell review of each quadrant and a new story of evolution through five distinct levels which parallel Wilber's continuum from matter to body to mind to soul to spirit.

Purpose/Passion. It seems right enough to start with what we love, what we think we want, why we work, and what we intend to create for ourselves. This is the inside-individual face of organization. It's about consciousness, about paying attention to what has heart and meaning, about resolving the conflicts that arise between what we have and what we want, about why we get up and go to work everyday, and about what organizations must honor and appreciate in order to attract talent in competitive markets.

Looking into our map now, we see that the evolutionary journey in this quadrant is about learning to work for higher and higher purposes. In the beginning of our own work lives and the lives of organizations, we work for the excitement of it all. Over time, we might start a family, settle down, and excitement isn't as important as security and stability, to be able to maintain the success we've had at the first level. Once we come to believe that we will not lose the gains we've made, it's easy to shift into a proactive drive for still more reward, and work becomes about reaching the next rung of the ladder. At some point, however, we come to the place of asking ourselves what's really most important to us, what is our deepest passion, what do we really love and how can we do THAT in our work. We give our attention to insight, integrity, the things that pique our curiosity and help us feel healthy and whole. Until finally, we begin to ask how we can do the most service for the most other people, working beyond our own personal passions to a compassion for so many others.

I should note here, too, that our movements through these levels, as individuals, organizations and a whole national consciousness is never as strict and mechanical as moving from first grade to second to third. Rather they are a journey like any other learning or practice scale, like our 10K race times, monthly sales, and the stock market. They are some easy milestones against which to mark the movement of what we can think of as the critical mass of our attention to each of the four dimensions. And how big we care, how much we see, how easily we let go, and how responsibly we act -- just like our 10K race time -- moves from day to day, depending on all sorts of circumstances and conditions. We'll see differences, too, between people in the same departments and departments in the same organization. The critical mass of attention in the sales department is likely very different from that of the corporate philanthropy department or employee assistance program.

Furthermore, if we say that the latter fall higher on the scale, at a higher stage or level, we need also to note that their work is only made possible by the revenues generated by the sales department. None of the higher levels are sustainable without the infrastructure and foundation provided by the lower levels. This is what Wilber means when he says each level transcends, rises above the one before it, AND embraces, includes, and depends on the work done at the level below. The overall drive is to increase, expand, and transcend, bringing more and more of our individual, departmental and organizational attention and energy to higher and higher levels. This movement happens always and everywhere, trending upward without effort or trying. It's enough just to pay attention. Simply noticing these movements and levels can make our work easier, but making one level better than the next always seems to get in the way.

And so, keeping in mind then, that no map IS the territory, that no person, department or organization is all or always focused at one level, in any of the quadrants, and that no one level is better or worse than another, we continue with our story about story...

Story/Culture. Here the challenge is to explain what we see, to clarify where we should go, and develop the stories that help us stay focused and stay together. This is the inside-collective face of organization. It's about culture, about seeing and telling the truth about who we are, about defining simple patterns in times of complexity, and about the work every organization must do to segment and go after the customers it wants to serve. It's about creating a story that customers (and everyone else) can literally buy into and believe in.

The logic of our central organizational story moves from what I call auto-logic, the obvious, through monologue to dialogue and onto multi-logue and beyond to what I call translogue or translogic. As organization begins, it's central story is about headlines,

imaging and spins. It's logos, business cards, press releases and soundbites on the outside and the grapevine on the inside. It's the superficial, the automatic, the obvious and it's all about excitement. At the next level, the focus shifts to stories of stability and loyalty: mission, vision, values statements and monologues by the people in charge. The organizational body emerges, followed by organizational mind: the strategic plan. And with the emergence of the plan, dialogue takes over. The leader can't dictate through monologue, but has to control through ongoing dialogue with each part. The story, the plan, and our reason for working are all told and retold in the universal language of 'the numbers.'

As evolution continues and complexity rises, the parts start talking to each other and the multilogue breaks out. It's everybody talking to everybody, which doesn't happen very often in most organizations. In the chaos of it all, the strategic plan gives way to the strategic invitation, a story that is simple enough to travel fast and light, to appeal to people's passions, the reasons why they really want to work AND is complex enough to embrace and include the most important issues from the grapevine, the mission statement and the strategic plans. Strategic invitation is the story that leads organization into multilogue, where strategic conversation can move faster than the plan. Beyond this, at the highest level, where the reason we work is compassion for all, the story and vision become dream, a 'translogue in which we seem to be in conversation with the whole organization, as organization, at once... or maybe even something larger.

As the challenge with caring is to speak it, the challenge with our talking story is to walk it in our decisions, structures and systems.

Structure/Systems. This is where the vision, reflection and conversation of story and plan emerge as the objective, observable choices and decisions, the stuff that guides real action. This is where we get down to how we're going to get where we've said we want to go, where we develop the structures and systems that support timely and wise decision-making. This is the outside-collective face of organization. It's the sandbox where we build up organization structures and production systems AND where we let them go, tear them down, and open space for what's next. This is where we come up against the dizzying reality that it's ALL moving, where we learn over and over again to go with the bigger, faster flow.

The evolution of organization structure and systems (and restructuring and redesigning) begins simply as a circle of friends, colleagues and associates. It's a cast of characters, some of whom may be bigger stars than others, but none of whom really tells the others what to do. As cast, circle, task force, posse, and business start-up we may take our cues from outside directors, sheriffs or financiers, but inside the organization, it's an all for one and one for all kind of game that we play for the excitement and headlines. If we have some success together, however, we turn quickly to those bigger names to secure our future. We pledge our loyalty and submit to more and more monologues about policy and procedures, mission and vision. When we appoint a team leader, hierarchy emerges and in time becomes bureaucracy, where responsibility for outcomes rests not with the workers, but with the managers one or more organizational layers above. And this works for a time, until the pressure for front-line decision-making starts to erode lines of command and the bureaucracy starts to dissolve. We restructure into smaller, faster networked boxes, each one full of numbers and assigned to a person, who sits in a matrix of cubes and reports to a handful of different bosses.

Each year or so we reshuffle the boxes, until the whole organization ends up in constant motion, one big organizational to-do list, a veritable marketplace of projects, each its own little cast, circle, posse, task force. The circles are formed by invitation (though some invitations are more open than others), to meet specific business needs, given a budget

and/or other resource boundaries, and directed to perform in a way that adds value. This is what we're coming to know as the structure of organization and the way real work gets done. Now look again at the process of Open Space, where the circle is formed by an invitation, based on personal passion, professional interests and business needs, the resources and boundaries are clearly marked and the direction is do whatever you can to maximize your own learning and contribution. Open Space is real work, made faster and easier, in circle and invitation and marketplace.

And finally, if our experience in Open Space is any indication, when the marketplace of ideas and issues and projects REALLY starts to move, what emerges as the highest form of organization is movement, an undeniable sense of spirit and hardly any real structure at all. At this highest level, our compassion or concern is for all (all customers, all employees, all people, take your pick). Our story starts to sound like "I have a dream..." and structurally, in the words of folk singer Arlo Guthrie, "They'll call it a movement!" when the flow of work is nothing but flow. And the thing about flow is it comes and it goes, but it CAN be invited, we know.

Action/Responsibility. In the end, however, organizations don't really move, don't really do any work -- people do. We think and talk and build support for what we care about. And then, each of us DOES something. Takes responsibility and takes action. Makes a difference and makes our own unique contribution to the flow of evolution. This is the outside-individual face of organization. It's about unique, individual behavior, about creating value and using diverse abilities to make things different, about what we have to show for ourselves, and where we stand, when our work is done. This is the question of finance, value and contribution -- the footprints we leave on a bottom line and better world.

The evolution in this quadrant runs from making different stuff, the proverbial better mousetrap, to making a difference that makes a difference, rippling through everything. While it's been associated here with diversity, that's really only half-way there, as it is really about uniqueness, the reality that each of us is absolutely unique and the possibility that every single action IS a unique, creative act.

This journey begins with making appearances, making points, adding value with bells and whistles, a new look to an old product. It's what makes work exciting, makes headlines. In the beginning, it's about showing up in the right places, but eventually it becomes about showing up at the right time, making deliveries, as promised, time and again, loyal and stable, like it says in the mission statement. Eventually, however, as the business grows, the loyal servants are rewarded. We make them partners, shareholders, give bonuses as rewards, and investments. Everything is done based on expected return, the places we work, the projects we choose, the phone calls we return are all 'calculated' for potential payoff.

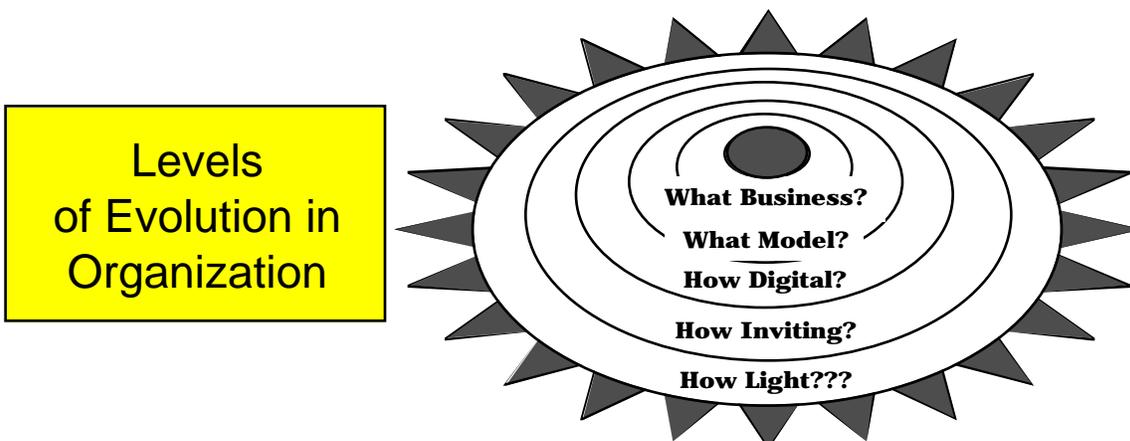
At some point, however, the luster of marginal gain, or the effort of calculation in the face of rising uncertainty, just doesn't matter anymore, and we begin to do what we REALLY want, without regard to returns. We make offerings, contributions and invitations, true gifts of ourselves and our time. We begin to connect our work to those issues, ideas and opportunities and questions that make us feel curious, passionate, healthy, whole. And in those moments when spirit shows up, it all seems to swirl together, everything really works. We make responsible ripples and have an effortless but amazing impact on the people and world around us, often without even knowing it.

## The Inviting Organization Emerges

And there you have it, in about twenty nutshells. This is my story of evolution at work, mapped onto the oldest story of human evolution, as integrated and animated by Wilber, from the physics of excitement and matter, through the biology of body, the psychology of mind, the theology of soul, finally arriving at the mysticism of spirit.

Drawing on Wilber, Harrison Owen has developed his own story of the evolution of organization and leaders, based on his own personal experience in organization and Open Space. That story begins with the reactive organization, defined by the reptilian instinct of killing and eating whatever moves. The leader here is the pioneer, the entrepreneur. Next comes the responsive organization, customer-focused, aiming to please, and as reassuring as a good English pub, but don't mess with the bartender. The proactive organization comes next, characterized by an insatiable need to measure and analyze everything, led by the MBA. In Harrison's story, the interactive organization is emerging now, characterized by the energy of a good coffee break and the action of surfing, and leadership that is 'everybody.' This is, of course, just what Open Space looks like. And finally, the highest realm of organizational life, says Owen, is the inspired or inspirited organization. He is quick to add that while he's seen it show up often, he's never seen anyone sustain this highest level of organization, where leadership is invisible, it's nobody, or at least it's nobody we can see.

Coming at this from a more academic direction, Fred and Merrelyn Emery have studied what they describe as four kinds of organizational environments. The first level is 'random,' where the goodies and badies come randomly and can't be predicted. That's



Levels of Evolution	Matter	Body	Mind	Soul	Spirit
Operating Environment (b)	Random, Chaotic	Clustered	Disturbed	Turbulent/Adaptive	Vortical
Journey of Spirit at Work (d)	Reactive	Responsive	Proactive	Interactive	Inspired
Organizational Heroes (d)	Pioneer	Captain/Pilot	MBA	Everybody	Nobody
The Seattle Stories	Weyerhaeuser	Boeing	Microsoft	Starbucks	Chief Seattle
<b>THE Strategic Question (a)</b>	<b>What Business?</b>	<b>What Model?</b>	<b>How Digital?</b>	<b>How Inviting?</b>	<b>How Light???</b>
Individual Purpose/Passion	Excitement	Security	Achievement	Passion/Well-Being	Compassion
Organizational Story/Culture	News	Rules, Values	Plans	Invitation	Dream
Organizational Structure	Cast/Task Force	Team/Hierarchy	Network/Matrix	Marketplace	Movement
Individual Action/Making	Appearances	Deliveries	Investments	Contributions	Ripples

(a) Fast Company (b) Emery (c) Herman (d) Owen

why we have to be reptilean and reactive, per Owen, at this level. Next comes 'clustered,' where patterns emerge and learning and planning become possible. Then, they say, one group is eating into a pile of goodies and discovers another group eating into it from the other side. They call this environment 'competitive' and 'disturbed,' because the competition continually disturbs our well-laid plans. Next comes the 'turbulent/adaptive' stage, a state where the disturbances have resolved into permanent whitewater and continuous adaptation becomes essential for survival. Finally, they hypothesize that there is actually a fifth level. They could sense it, but could never study it formally because, like Owen's inspired level, it can't be sustained long enough to document. They call this level vortical, as in vortex, which fits perfectly with our experience in Open Space and elsewhere. When spirit runs high in a workgroup, as it does so often in Open Space meetings, participants often report having planned to or even tried to leave, "but something kept sucking me back in." The energetic pull of inspiring work seems consistent with the physical sucking of the vortical (swirling, whirlpool) environment in the Emery story. While it's important to note that their research and analysis did identify distinct ideals, strategies, planning scopes and operating skills required to survive in each of the first four environments, we'll save those details for another day.

A more playful extension of this story, however, and one that might help this map sink a bit deeper in memory, is something I call the Seattle Stories. This is really a simple, five-stage history of the Seattle region, which has participated in every major wave of American economic development. The first wave was timber, led by Weyerhaeuser, an exciting, pioneering sort of business, gathering the raw materials (matter) that were the building blocks of the rest of business life. Next, came Boeing, literally in the business of manufacturing stable, secure bodies that make deliveries and are operating by chiefs who make monologues over loud speakers like CEOs on the company-wide conference call. In the information age there is Microsoft, a company that may have invented stock option incentive plans, has networked us all, and made us all a little out of our minds. Next comes free-agent nation, where the leadership is everywhere and the headquarters is Starbucks. Like the very first open space meeting, it's all about the energy of a good coffee break, simple, powerful, working, learning, relaxing -- and exceedingly profitable. And finally, there is Chief Seattle, the invisible, spiritual leader of the environmental movement, to whom all kinds of wise sayings are attributed.

Finally, if you step back for a moment, to the Evolution at Work table of contents, you see that the five sections of my own story flow through these same five levels. Opening Invitation (in organization) is about what had me so excited in the first place, about my own pioneering and discovering in open space. Inviting Evolution defined the body of this work, with mission, vision and values that include poetry and science, beginnings and endings, the personal and universal. Evolving Organization is the section we're in now, rational, logical, analytical, the strategic justification and business case for the inviting organization. Next, Organizing in Open Space introduces the soul of this work, where it all comes together, in practice, as inviting -- something we can do AND be, as individuals and organizations. The pieces there are built to travel as handouts, as the leaders of the practice become 'everybody.' Finally, the Opening Invitation (as organization) comes back to where we started, but knows the place for the first time. It's a last wisp of the spirit of (this) invitation to discover the inviting organization.

And so we return to the Fast Company story that gave rise to this whole adventure. As a strategic question, "What business are you in?" certainly rests on the obvious, the essential, the matter of work. "What's your business model?" demands more of a body: set the boundaries, integrate the parts, make the case for what's in and what's out. "How digital are you?" is all about information, data, mind, and running the business by the numbers, which is where most of our organizations are now. But I wanted to know what the new

leaders were doing now, not fifteen years ago. What is the NEXT great strategic question? Everything I've seen says it must be "How open and inviting is your organization?"

### **The Inviting Organization in Open Space**

The inviting organization emerges from everything and everywhere we've already been, and indeed still are. The emergence of passion, curiosity, health and well-being at work come not at the expense of excitement, security and achievement. They come as the fruits of it. The excitement comes not from the outside, but from the rush of bringing our own personal art to the outside, at work. The security comes not from knowing this job or organization will last, but from knowing who we are and that we have options beyond this one. And while we still get things done, we do them better than ever because they are the things we see as most important to do.

Similarly, the emergence of strategic invitation and strategic conversation does not come at the expense of the strategic plan, but comes on top of it, animating and detailing it like never before. Every invitation, from the largest, company-wide strategic planning conference to the simplest "Joe and Susie are moving to California, come help us pack them up and send them off" gathering of friends is built on the same information: (1) the news, headlines or theme, (2) the mission, vision, values, and (3) the expectations and plans. In the case of Joe and Susie, the news is that they're moving. The values are love, friendship, community. The plan is for everyone to bring boxes and tape and for Joe and Susie to keep the pizza and beer coming until their stuff is all packed.

The strategic corporate invitation does the same: some news that needs attention, the boundaries, budget, and other known constraints, and the logistical details for where and when the working session will be convened. The invitation includes all the levels of story below it, and transcends them as something smaller, faster, clearer, stronger. They look like soundbites, but move at the speed of the grapevine, with the simplicity of a to-do list and the power of the entire strategic plan. And as we move beyond the soundbites, the mission statements and the plans, posting their essences in strategic invitation and hosting our most important work in strategic conversations, we transcend command-and-control, as well.

Command relies on the bartender, pilot, captain or other executive who can be heard over all the others. Control relies on measurement and constant observation. As we move beyond command-and-control into a world of post-and-host, we don't discard these things, we expand them. Over time, the initial cast grows into team, becomes bureaucracy, dissolves into network. When it finally blooms into marketplace, it allows EVERYONE to be heard over the turbulence of the work and demands that EVERYONE be paying attention to maximizing their own learning and contribution. In our most highly evolved organizations, ANYONE can post an invitation and host a working conversation to address business issues AS THEY ARISE and everyone can see all of the invitations, the entire work of their organization.

Finally, as our work evolves, we don't stop making appearances and discovering new and different things, we don't stop making deliveries and making good on commitments, and don't stop expecting a return on investment. But the nature of these things changes and merges. Most notably, as our circles expand and bloom into marketplace, we notice that we benefit from all kinds of unexpected contributions by others. As this happens, we contribute more easily and actively because we don't expect our returns to come as quickly or directly. Our commitments become pledges to stay together, stay present, until the work is done, as long as it takes. And finally, the appearances we begin to invite and be excited

by are no longer about our moments to shine, but those moments when spirit appears and shines through others.

The inviting organization emerges and re-emerges out of personal passion and artistry, strategic invitation and conversation, an open community marketplace, and the responsible pursuit of learning and contribution. It is truly extraordinary, and not where most of us live and work everyday. But it does happen -- and happen with regularity. It has appeared in most of the Open Space meetings and events I've facilitated. And when the work of those gatherings closes, the waves of thank yous, amazings and extraordinaries have been heard, I always remind the group that while the inviting organization that emerges in open space IS extraordinary, it need not be rare. Indeed, the passion and responsibility, clarity and quickness that is the inviting organization can be invited easily and often, in Open Space and otherwise, by the intentional practice of invitation at work.

### **Inviting Conclusions**

This, then, is my own short story on Open Space Technology: It is the skillful and ongoing practice of invitation in organization. I say this not only because an open space event begins when the leader(s) of the organization issue a strategic invitation and open a strategic conversation, but also because of what can happen next, and next, and next... rippling through everything.

When the leader(s) of any organization notice (and dare to say) that the most important questions facing the organization are more complex, diverse and urgent than the current systems and structures can handle, that there is some conflict between what we have and what we want, Open Space Technology allows them to invite and engage anyone and everyone who has any concern or responsibility for resolving these questions. When that first invitation goes out, it naturally attracts all of those with real passion for the issues identified. This IS what any good invitation does: it raises issues, stirs passions, and links them to responsibility for showing up to work.

When the people gather on the day of the event, the facilitator walks into the open space in the center of the group (circle) and invites them again. This time the invitation is to identify the issues that they are most passionate about and for which they are willing to take some responsibility. Then any number of people jump out of their seats, grab markers and paper, and the next invitations go out. This time, however, the invitations come from all over the organization, from any of the participants in the room. These folks are inviting the rest of the group to their targeted breakout session to deal with the issue(s) that they see as most important.

When the conveners (hosts, if you will) of the breakout sessions capture the notes, ideas and next steps identified in their sessions, they can be distributed in a book or website with the same from all of the other sessions. These collected notes invite all participants, and anyone else with whom these notes and next steps are shared, to follow-through on the actions identified. Often, some of those next steps include convening other meetings in open space. In this way, the practice of invitation comes full-circle, and sets itself up as an ongoing practice in organization. When new leaders emerge in open space, new invitations spring forth, and new results tend to follow -- people and organizations growing together, by invitation.

In day-to-day organizational life, this identification of issues, assigning of responsibility, scheduling of meetings, discussion of options, and documentation of next steps all qualifies as "real work." In Open Space, however, so much of this real work happens so

quickly and easily, that we often fail to notice how much real work is actually getting done. Indeed we often slip into measuring "real action" and "real work" in terms of pain and suffering rather than promise and progress. And, as ever, we'll get what we ask for.

We could theorize that this new, inviting organization goes beyond command-and-control, to a place and practice of post-and-host -- the posting of working invitations and hosting of working conversations. We could reason further that while there is much to achieve in organization, nobody wants to BE an achievement. And while people want to BE inspired, as soon as we put "inspire the troops" on our to-do list, we flatten spirit into just another doing. Invitation begins to resolve all of this -- because inviting is something we can DO as an ongoing practice and can aspire to BE as leaders and organizations.

**In practice, however, we quickly discover that things tend to get done faster and easier by invitation. In short, working by invitation really works.**

And looking back, we see that nothing has been wasted. We've called it management flavor-of-the-month. Well, pick your favorite flavor and you're sure to find it on the map of our evolution, sure to find it contributing to the infrastructure that supports the emergence of open invitation at work. We've seen the emergence of "people goals" and "culture objectives" that give attention to the softer side of organization. Flexible schedules, open-book management, large-group meetings of all kinds have created new options, movement and markets within organization. We've seen all kinds of experiential team-building work, supporting both the rise and the fall of traditional leadership in organization. In our systems, we've seen technology explode into e-commerce marketplaces and knowledge management systems let everyone talk to everyone, even across time through the use of archiving functions. In the area of diversity, we have evolved from boundaries and glass ceilings as a focus, to quotas (diversity by the numbers), and now to various kinds of diversity training that helps organizations find valuable diversification rather than dangerous deviance in difference. The inviting organization rests upon and fully embraces all of our work to date, every flavor-of-the-month has been distance made good.

Looking forward, with this clearer picture in hand, we can see how our journey can be that much more carefully directed and quickly actualized. We can see now how evolution calls us to balance our work in the four dimensions. Over-emphasizing finance or speed at the expense of clear cultural story and passionate, personal artistry can only throw our wheel out of balance. We can see ourselves rise and fall between the levels of evolution, not a steady, mechanical climb but a series of peak moments that we keep working and practicing to make ordinary, everyday, routine. We can see that what happens in Open Space meetings and events are such peak moments and that the practice of invitation -- doing AND being inviting -- makes more of them. And finally, we can see that in supporting this seeing, this story itself invites you to create it and reaches for the vision, the dream, that lies beyond.

As I shared this picture with Harrison Owen one evening, it occurred to me that in the physicists' story, matter arises out of nothingness, the void. And in the mystic's story, spirit returns us into it. When I added that blackness in the center AND at the edges, it immediately followed that I should fold the four blackened corners into the blackened center, so the whole thing becomes a sort of doughnut. In this way, our seasonal evolution through the four quadrants becomes a spinning around the empty hole of that doughnut. And our evolution through the levels becomes a turning of that doughnut through the hole of that doughnut. This realization gave me pause, a quiet little moment of personal "oh, wow!" Then into that silence, Harrison told me for years he'd had recurring dreams of

such a doughnut, mysteriously spinning in space, around and through it's own hole...and that some years later a physicist friend of his explained that physicists call the doughnut a "torus" and know it as the shape of every energy field in Universe.

So we just might be onto something that's quite a bit bigger than we expected. I find it reassuring to rest inside of a story that goes so far and can still inform my day-to-day work in organization. In a recent Open Space conference on management renewal, inside of a giant pharmaceutical corporation, a number of managers noticed that once the event got underway, I didn't seem to do very much at all. The usual comment as they approached was something like, "Boy, I wish I had YOUR job." And my usual response was to notice aloud that when we get our most important issues and projects posted on the wall, with a space and time for each one, the people get moving, the work gets done and management gets a whole lot easier.

These kinds of Open Space events are inviting this kind of simple, powerful, productive ease -- in more and more major corporations, schools, churches and community organizations around the world. The case study that follows next, by friend and colleague Uwe Weissflog, tells the story of evolution at work, in Open Space, over the course of four years, in a major global engineering and design firm. I find it incredibly hopeful that so many of these stories are emerging in Open Space and in the world. More and more, it seems that as we get better at bringing people together at work, it gets easier to get the job done. It gets easier to breathe, easier to sleep, easier to let go... and easier to do the most amazing things, at work.

# Strategic Conversation as the Means for Organizational Change

## A Case Study by Uwe Weissflog

*Uwe Weissflog and his work are a rare combination of personal authenticity, academic rigor, and business success. His story is the most open, objective and insightful report I've ever seen on the inter-weaving of a variety of process interventions, over the long haul, in one organization. What follows here is an edited excerpt of Uwe's original, longer version at <<http://www.globalchicago.net/mha/stories/conversation.html>>*

*Uwe and I met at the 1997 Open Space training workshop in Chicago. On the second evening of the workshop we stayed up until something like 3:00 am. It was strategic conversation about strategic conversation! ...as we began to wrap words around this notion of strategic conversation as the means for organizational change.*

*What follows is a story about asking big questions, engaging the whole organization, and beginning to explore this style I call "post-and-host" -- in a real, corporate and scientific organization. As a result of their work, Uwe and his organization, Structural Dynamics Research Corporation (SDRC), are recent recipients of the Soaring with the Phoenix Award, given by author Jim Belasco, for excellence in organization transformation and rebirth.*

*Uwe was trained as an engineer and evolved into SDRC's Manager of Strategic Planning and then into Director of Organization Development. He continues to shepherd the worldwide unfolding of this story at SDRC, currently as their "Vice President of SPACE." He welcomes your thoughts on this story and would be glad to bring you up to date on what they've been learning most recently at SDRC.*

Contact him by email at <<mailto:uwe.weissflog@pathwayguidance.com>>.

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“Every person is a particular kind of leader, no leader is a particular kind of person”  
[ancient Chinese proverb, adapted]

### Abstract

This paper describes the struggle of SDRC a leading global supplier of Mechanical Design Automation (MDA) and Product Information Management (PIM) solutions, to authentically express itself in the markets it serves. The case study is based on the experience gained over a period of four years. Since 1995, various approaches have been used to create a vision of "who we are and where we are heading". This vision had to serve at least two purposes, to be of value to our customers and to enable the members of the organization to develop a clear sense of purpose and direction. The organization assimilated ideas it could digest and rejected those that were too radical. Gradually, the company developed a clearer image of its identity and direction, congruent with the dramatic changes that happened in its markets.

Processes and methodologies that proved to be most successful were based on common sense and unorthodox thinking. The pace of change in the company's markets required an approach that was different from traditional strategic planning. The idea of "the plan" was replaced with "Strategic Conversations"; i.e. the ongoing quest to find answers to several key questions:

- Why are we in the business we are in?
- Where are we today?
- Where do we want to be in the future?
- How do we operate today?
- How will we operate in the future?

Openness, large scale group participation, and a systemic view of the company and its environment proved to be valuable elements in this ongoing quest. Emerging parts of the collective identity include, a better understanding of our core competencies, the capability to see reality as a collection of diverse views, and the awareness of the power of alignment. These shifts in consciousness help us to accept who we are and what we are changing into.

## **Introduction**

### **How it all started**

Early 1995 was a gloomy time in the history of the company. Within weeks, our stock price fell to below \$4, reflecting a loss of shareholder value of more than 80% in less than 12 months. Financial overstatements caused a crisis resulting in drastic consequences:

- A set of layoffs
- Suspension of the company 401K plan contributions
- Dismissal of the CEO and part of the executive team.

At the same time, the flagship product of SDRC, a complex offering of mechanical design, analysis and manufacturing software, experienced severe quality problems. For the first time in its 25-year history the company experienced a real threat to its existence.

This threat proved to be the beginning of a new era at SDRC. Since 1995, the company has started six strategic initiatives to find a path into its future. The author was intimately involved in all six, either in a leadership role or as a facilitator. Two of the six initiatives are described here.

### **Where we are today**

The key learning of the past four years is the insight, that by simply staying in these conversations, the company is changing. These conversations enabled awareness of key organizational needs, such as balance of short and long-term demands, reconciliation of internal innovation aspirations with external market pressures, and fusion of stability and risk-taking, to emerge. This awareness enabled the company to gradually change. No single conversation has introduced these changes; they came about because of the repeated

and ongoing inquiry into these issues. Staying in conversation seems to have made the difference.

## **Two Stories of Strategic Conversation at Work**

SDRC's Strategic Management Process (SMP) was a corporate business strategy initiative based on a process developed internally. SMP included insight from a variety of sources among them strategic planning, business, leadership, science and philosophy. The Customer Council for Strategic Direction (CCSD) brought together key customer executives, industry leaders, academe, and the company's executive management team to jointly talk about the future.

### **STORY #1: Strategic Management Process (SMP)**

In 1997 we decided to explore the world of strategic planning more thoroughly before any initiative was started. We considered various sources to better understand "strategy," among them:

- Roughly 60 books on strategy, covering a wide span from ancient strategic thought to recent understanding of strategy.
- Theme searches on the world-wide-web with focus on consultants and their methodologies in the areas of strategy and organizational development.
- We also looked at processes and methodologies used in strategy development, in particular processes with an underlying holistic approach.
- Large scale group interventions including Open Space Technology (Owen, 1992), Systems Thinking (Senge, 1994), the Future Search Conference Model (Weissbord, 1995) and Servant Leadership (Greenleaf, 1983).

Eventually, a set of key questions formed the underlying basis of SMP, relating to:

- WHY are we in the business?
- WHERE are we today?
- WHERE do we want to be in the future?
- WHAT are the opportunities?
- HOW do we seize the opportunities?
- HOW do we react to gaps between actions and plans?

The SMP process was designed for and used by the corporate strategy team, which was composed of the CEO, his executive team, and some key business and technology professionals. This small group, except for the Environment Scan, carried out all SMP process steps. The result of SMP was a set of documents that covered the territory described in the list above.

The SMP Environment Scan, the key event to gather information about the company's internal and external environment was conducted as a two-day Open Space event in which 85 people participated. This event was structured around the following inquiry:

- The key question: "What do we know about us and our environment today and where do we want to be in the future?"
- Twelve questions, developed by the executive team in a smaller Open Space prior to the Environment Scan

After sharing this framing in the opening ceremony, the event followed the principles and laws of Open Space. The initial twelve questions were expanded to eighteen and the group self-organized into smaller groups to answer the questions (listed here).

#### Questions with internal focus

- What are our weaknesses?
- What are our strengths?
- What competencies will we need in the future?
- What are/will be our sustainable competitive advantages?
- How will we attract/retain the employees and talent we need?
- What is obvious? (No-brainers actions)
- How do we decide what customer to listen to for direction and how do we listen and respond?
- How do we increase positive corporate visibility?
- How can we pro-actively leverage a combination of our product lines?
- Which management system/structure is conducive to our success? How do we use organization to achieve business success?

#### Questions with external focus (customers and markets)

- What will our customer software needs be in the future?
- What challenges will our customers face in the future?
- What solutions will our customers need in the future?
- What are the emerging trends that will impact our future?
- What will the competition be in the future?
- What are potential threats to us?
- Who are our future customers?
- What are the adjacent market spaces/products we might add?

During the Environmental Scan event, each group documented its results in a very simple form and presented them to the entire group at the end of each day. By the end of the event a 120-page document was created and made available to all participants within 24 hours. Within two days, the group had covered a wide area of concerns, covering both internal and external areas. The document is still a valuable resource today. Its usefulness would even be higher, had customers, industry analysts and others taken part in its creation.

Later, SMP created implementation plans and spelled out ownership. It did this, in part, because all formal process owners, i.e. Product Development, Sales, Marketing, Human Resources, etc. participated from the beginning. Several results of SMP, such as a better

understanding of the structure of our markets and corporate focus on certain industry segments, were readily accepted.

Partial success also can be claimed for linking the financial goals developed during SMP with the actual Annual Financial Plan. One big success was probably the marketing and image campaign that resulted from a deeper understanding of how much the company was really known (and unknown?) in its environment.

Other factors played a role, too. Again, action happened because the results of SMP complemented what the formal organization was also discovering on its own. Both sides compounded the need for action, and therefore something happened.

## **STORY #2: Customer Council for Strategic Direction (CCSD)**

In early 1998 the company took a real leap of confidence. For the first time we opened the conversation about the future of our markets and ourselves to the participation of customers, academia and close business partners. A formal business event combined with Open Space provided the framework. The latter was imbedded inside the formal meetings with the intent that both forms would not interfere with each other. Two days of the three-day event were totally dedicated to Open Space. Only the Open Space event will be described here.

As is the case in all Open Space events, there was no preset agenda, except for a trigger question. The question The Future Role of Information Technology in "Making and Moving" Digital Product Information; Local and Global Perspectives had been communicated in the invitation. After "opening the space", which included the explanation of the process, the agenda was created by the group in less than one hour. The group then self-organized in sub-groups, with all participants attending the sessions that they felt most passionate about. It is worth sharing that the group consisted of eighteen very senior industry leaders from around the world.

In the sub-group meetings, the observation work happened in multiple forms. Informal conversation, formal presentations of material that individual members had brought in anticipation of topics they wanted to talk about, and creative brainstorming were used at different times. The diversity of the groups enabled the creation of a rich web of information. This was further enhanced by the seniority of the CCSD members, ensuring that the groups addressed the key areas of today's business and technology challenges.

Each day we provided space to share results, insights and observations of the different sub-groups. All sessions were recorded online using a laptop. This provided the opportunity to share the results with all attendees directly after the conference was over. We used a local overnight printing service to provide draft copies of the results.

## **The Learning Experience**

Looking across all six of our strategic initiatives, the most puzzling experience in all initiatives was the fact that the implementation of the plans broke down during the action stage. Although something happened as the result of each of the major activities, the significant recommendations were never implemented. It is also impossible to state the success of the pieces actually implemented, because no consistent way of measuring was

considered seriously by any of the plans. However, a few positive results can still be reported:

- Whenever the plan pointed to something that was already considered in the respective decision-maker's mind, it was used to reinforce momentum for this activity.
- Whenever real insight and understanding was gained, independent of whether or not it translated into action, the new knowledge became part of the ongoing strategic conversation.
- At times, with no direct causal relationship to a specific strategic planning document, this knowledge would resurface, (sometimes named differently) and result in appropriate action.

Another, positive effect, is the growing awareness throughout the organization, of the inconsistencies of plans and actions. The shared awareness of our repeated breakdown in the action phases has helped the company to be more aware of its weaknesses and the underlying causes. The expanding awareness is fuelled by an increasing corporate-wide desire to understand the environment and the company as clearly as possible. This search for the truth has surfaced several deeply rooted challenges and tensions that the organization continues to wrestle with, among them:

- Creating balance between the sales organization's tendency toward "being driven by customer demand" and the planning organization's attempts to "strategically directing one's own fate";
- The understanding that organizational change can only happen based on individual change;
- The negative impact that collective memory loss and missing alignment have on market momentum.

*Being driven and directing one's own fate, balancing sales and planning*

When the commitment of the sales organization to fulfill potential customers needs, even when the available product lacks some of the promised capabilities, consistently wins out over the commitment of the planning process/organization to independently determine long-term direction based on market understanding and creative innovation, it becomes a truly vicious cycle, preventing the organization from building the positive product momentum required for long-term success and survival.

At times, however, the momentum of the sales organization can save the organization from gaps in the long-term planning process. In early 1996, during the last meeting of the strategic planning process, all corporate support for the recommendations had faltered. No other strategic initiative was planned for 1996. But despite this unsatisfactory situation, the strong influence of an extremely large contract the sales side of the company had won in late 1995 propelled the company through 1996 and into the major leagues of our industry.

Fulfillment of this contract and operational excellence were of the utmost importance during that time. Fortunately, the expectations set by this contract were strongly aligned with the basic recommendations of the failed strategic planning process and strategy implementation became largely synonymous with implementing this contract. So where's the problem? Only that we did not fully appreciate this possibility and that, even today, we still struggle to accept our co-dependence on our markets and customers.

### *Individual and Organizational Change*

It is a tragic illusion to assume that we can change others without changing ourselves. This misunderstanding seems to be related to a shift in the fundamentals of our thinking more than 300 years ago. The mechanistic view of the world, initiated by Newton and enforced by the industrial revolution of the 19th and 20th century, has created a mindset that separates planning from doing. This mental model, aided by specialization, contributes to an unspoken reality, where only certain people have to change, while others are exempt. But the emergence of knowledge work, distributed worldwide and linked in a network fashion, is challenging this model.

Any change in such a dynamic environment, where formal power and control are undermined by dynamic realities, will depend on voluntary, individual change first. One encouraging observation, across all six of our initiatives, is that this individual change actually does happen, when it is invited and given some space to unfold.

### *Momentum, Alignment, and Memory*

Alignment is a prerequisite to build momentum and reduce friction. Alignment must be system-wide. Actions need to be aligned with plans and people need to be aligned with the organization's vision. One very positive experience of alignment was the annual kick-off event in 1996, where the possibility for momentum emerged out of the consistency of the presentations, reinforcing the theme that previous strategic planning efforts had brought to life. Unfortunately this event was a rare exception.

## **Happy Endings**

All of this said, we should not forget that true learning and change also took place. Gradually, in each initiative the number of action steps actually implemented, increased. Shared insight and understanding started to appear throughout the company.

Our journey over the last four years can be described as evolutionary, moving from the hierarchical model of management making plans and employees executing them, to a more participatory model, where plans and actions are done by the people based on knowledge and not on formal status. This is consistent with organizational trends observed in highly successful companies in many knowledge-driven industries. In particular the following insights that shape the ongoing strategic conversations are encouraging:

- The diversity of environment and organization is best captured if the whole system participates in the observation stage.
- Any constraints put on the observation stage results in bias. Automatically these biases work like filters further reducing the capability to see what really happens.
- Insight gained while the whole system is present has the potential to become part of the organization's culture. This makes resistance to follow-on plans and actions less likely.

The experience of the past four years is changing the way we think about what is important to sustain our organizational existence. Changes, impacting our corporate identity, seem to emerge in several areas, among them:

- A shift from technology-centric to market-centric thinking.
- A broadening of our value system, from individual contribution to team (collective) contribution.
- An understanding of interdependence, within the organization and between the organization and its environment

In summary, we are in a state of change. We are embracing the needs of our markets, and allowing those needs to guide our innovative spirit. We are broadening what we value, adding team recognition to the existing focus on individuals. We are developing an understanding for interdependence, within the organization as well as between the organization and its environment. And finally, we are realizing that we can not walk away from our own insights. By keeping the conversations about our identity and our future alive, actual change is happening. This is not a bad place to be.

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## Intentional Evolution in Organization

So what if you could edit the DNA of your organization? Would you do it or does that sound too radical? What if you could alter your organization's genetic code, to have more of what works and fewer problems? Isn't that what you're already trying to do? Better yet, isn't that what you actually are doing right now, as you take in new information, see new patterns, envision new structures and strike up strategic conversations about new ways to work?

The organization of our world really is dissolving -- jobs into projects, communication into computers, corporate offices into homes and copy centers, and even national sovereignty into international markets and corporate strategy. The lifecycles of many jobs, products, strategies, and even some whole organizations have been crashed from decades to months.

In these times of swirling change, it's never been more important for leaders to emerge at every level of all kinds of organizations, to be able to look into the pulsing chaos of how real work actually gets done, to appreciate the evolutionary cycles of organizational systems and structures, and to understand their own efforts, conversations, stories and actions as the DNA of the organizational life they are already, and inescapably, working to create.

In other words, leaders everywhere are being called to the challenge of intentional evolution, called to continually change courses and edit their organizational DNA by editing their own efforts, conversations, stories and actions in ways that invite their colleagues into...

- a purposeful pulsation across the gap, the open space, between insight and integration, planning and practice, problems and possibilities, seeing and doing;
- a careful unfolding and unveiling of what is most important to us, in the context of public invitations and professional interactions, with confidence that we will know what to do and be embraced by whatever shows up next, in an ever-subtler spiraling journey; and
- the realization that when we take responsibility for changing, sharing, supporting and reconnecting with more of ourselves, we take responsibility for the well-being of our whole organization and the rest of the world.

Open Space Technology is one simple, powerful way to invite leaders, from all over an organization or community, to come together and practice intentional evolution -- to deepen insight, to open invitations, to adapt systems, and pull their various acts together -- in the midst of rapid, even swirling, change. Far from an abstract, academic exercise, intentional evolution in Open Space is fast becoming one of the most practical (and prudent) approaches for leading the life of an organization. As one CEO put it: "It scares the hell out of me, but I know it's what we have to do...so let's do it."

The next section says more about Open Space Technology and offers some practical tools inviting organizations to work more intentionally in Open Space.

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# Organizing in Open Space

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Play for more than you can afford to lose,  
and you will learn the game.

*--Winston Churchill*

# Open Space Technology: An Executive Summary

## What is Open Space Technology?

Open Space Technology is one way to enable all kinds of people, in any kind of organization, to create inspired meetings and events. Over the last 15 years, it has also become clear that opening space, as an intentional leadership practice, can create inspired organizations, where ordinary people work together to create extraordinary results with regularity.

In Open Space meetings, events and organizations, participants create and manage their own agenda of parallel working sessions around a central theme of strategic importance, such as: What is the strategy, group, organization or community that all stakeholders can support and work together to create?

With groups of 5 to 1000 -- working in one-day workshops, three-day conferences, or the regular weekly staff meeting -- the common result is a powerful, effective connecting and strengthening of what's already happening in the organization: planning and action, learning and doing, passion and responsibility, participation and performance.

## When and Why?

Open Space works best when the work to be done is complex, the people and ideas involved are diverse, the passion for resolution (and potential for conflict) are high, and the time to get it done was yesterday. It's been called passion bounded by responsibility, the energy of a good coffee break, intentional self-organization, spirit at work, chaos and creativity, evolution in organization, and a simple, powerful way to get people and organizations moving -- when and where it's needed most.

And, while Open Space is known for its apparent lack of structure and welcoming of surprises, it turns out that the Open Space meeting or organization is actually very structured -- but that structure is so perfectly fit to the people and the work at hand, that it goes unnoticed in its proper role of supporting (not blocking) best work. In fact, the stories and workplans woven in Open Space are generally more complex, more robust, more durable -- and can move a great deal faster than expert- or management-driven designs.

## What will happen?

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.

## Opening Space for Emerging Order

*Harrison Owen, an independent consultant and president of H.H.Owen and Co., is often credited with the creation of Open Space Technology, an attribution he rejects. In his view, Open Space has always existed and he was just fortunate enough to stumble upon it.*

*My own experience with Harrison has been an exhilarating, and occasionally maddening, cocktail of awesome acceptance and deep challenge. The Eastern notion of "When the student is ready, the teacher will appear," comes to mind -- and what teachers Harrison and Open Space have been!*

*Like any living thing or human system, the story of Open Space Technology is always moving, expanding, deepening -- evolving. What follows here is the story Harrison was telling about Open Space in late 1998...*

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Open Space Technology, as a definable approach to organizing meetings has been in existence for somewhat more than a dozen years. Truthfully, I suspect it has been around as long as Homo Sapiens has gathered for one purpose or another, from the days of the campfire circle onward. It is only that our modern wisdom has obfuscated what we already knew and have experienced from the beginning. But that is getting somewhat ahead of our story.

In 1985, eighty-five brave souls, or thereabouts, gathered in Monterey for The Third Annual International Symposium on Organization Transformation. The first two iterations of this continuing international event (we are now at OT17, and counting) were organized in a most traditional manner. Papers, panels, and all the rest. But the consensus of participants was, that despite monumental planning effort extending over a long time, the real excitement came in the coffee breaks. Which of course weren't planned at all. And so the Third International Symposium was going to be different.

And different it was. At the point of arrival, the participants knew only when things would start, when it would conclude, and generally what the theme might be. There was no agenda, no planning committee, no management committee, and the only facilitator in evidence essentially disappeared after several hours. Just 85 people sitting in a circle. Much to the amazement of everybody, two hours later we had a three day agenda totally planned out including multiple workshops, all with conveners, times, places and participants.

Observably, the operative mechanism was simplicity itself. As each person determined that they had some area of exploration they would like to pursue, they would write a brief description on a small placard, announce their topic to the assembled group, post the placard on the wall and sit down. When no further topics were posted, the original proposers determined the time and place for meeting, and anybody interested in a particular topic signed up. That was it.

For several years following, the annual symposium was conducted in a similar fashion. The only real difference was that more people came and it took less time to get organized. It seemed like the most natural thing in the world that 150 (or more) executives and consultants should sit in a circle and organize a multi-session, three-day meeting in less than an hour, with not a single argument. If anybody gave it a thought, which I doubt, this

miraculous occurrence was probably attributed to the outstanding nature of the assembled group.

And then, in 1989, Open Space escaped. Within a period of less than a month, Open Space was utilized with two vastly different groups in widely separated areas. Polymer Chemists from Dupont wrestled with the future of Dacron in the USA, followed immediately by a group of scholars and executives in India considering the issue of Learning in Organizations. In both cases, everybody sat in a circle, identified what had heart and meaning for them, and collectively organized a multi-session gathering in less than an hour. Something rather strange was taking place.

In subsequent years, the space has continued to open. At this point, the experience described above has been replicated literally thousands of times on all continents with groups ranging in size from 5 to over 1000. Participants have come from Fortune 500's, third world villages, religious communities, governmental agencies, and whole towns. They have been rich, poor, educated and not, labor and management, politicians and people... and all of the above. And in each case that I know of, Open Space appeared to do the job.

"Doing the Job" begs for further specificity. In the case of Open Space, it means (at the very least) that diverse, often conflicted groups up to 1000 people, manage hugely complex issues in minimal amounts of time, with no advance agenda preparation, and little, to no, overt facilitation. Typically by the conclusion of a gathering, the following promises have been kept: 1) Every issue of concern to anybody had been laid upon the table. 2) All issues were discussed to the extent that anybody cared to do that. 3) A full written record of all discussions existed and was in the hands of all participants. 4) All issues were ranked in priority order. 5) Critical "focal issues" had been isolated and Next Step actions identified for their resolution.

Also to be included under the heading of, "doing the job" are a range of manifest behaviors evidenced by the participant group. In a typical Open Space, self-managed work groups are the general mode of operations, distributed leadership the norm, and diversity is perceived as a rich resource to be cherished, as opposed to a problem to be managed. It is also usually noted that participants treat each other with respect, that conflict inevitably seems to yield deeper outcomes, and high energy -- often experienced as playful, is the marked characteristic of the occasion.

It is reasonable to ask, what on earth is going on. The mere thought of inviting 500 relative strangers, united by little more than their conflict around a particular issue to join together for a three day gathering, without a shred of agenda preparation, a small army of facilitators...should be sufficient to raise eyebrows. The suggestion that something productive might occur obviously contravenes most of what we have taught and/or learned about meeting management and the care and feeding of hostile groups, and definitely qualifies as outrageous. And yet productive outcomes from unlikely quarters has been the continuing experience of groups gathered in Open Space all over the planet. The outrageous is now common place. Somehow incipient (or actual chaos) is productive of order. Regularly.

What's the secret? Some have suggested that the Four Principles and One Law which guide behavior in Open space provide the clues. The principles are: 1)Whoever comes is the right people, which reminds people in the small groups that getting something done is not a matter of having 100,000 people and the chairman of the board. The fundamental requirement is people who care to do something. And by showing up, that essential care is demonstrated. 2) Whatever happens is the only thing that could have, keeps people focused

on the here and now, and eliminates all of the could-have-beens, should-have-beens or might-have-beens. What is is the only thing there is at the moment. 3)Whenever it starts is the right time alerts people to the fact that inspired performance and genuine creativity rarely, if ever, pay attention to the clock. They happen (or not) when they happen. 4) Lastly When it's over it's over. In a word, don't waste time. Do what you have to do, and when its done, move on to something more useful.

The Law is the so called Law of Two Feet, which states simply, if at any time you find yourself in any situation where you are neither learning nor contributing - use you two feet and move to some place more to you liking. Such a place might be another group, or even outside into the sunshine. No matter what, don't sit there feeling miserable. The law, as stated, may sound like rank hedonism, but even hedonism has its place, reminding us that unhappy people are unlikely to be productive people.

Actually the Law of Two Feet goes rather beyond hedonistic pandering to personal desires. One of the most profound impacts of the law is to make it exquisitely clear precisely who is responsible for the quality of a participant's learning. If any situation is not learning rich, it is incumbent upon the individual participant to make it so. There is no point in blaming the conference committee, for none exists. Responsibility resides with the individual.

One of the more surprising gifts of the Law of Two Feet is the apparent contribution to conflict resolution. I say "apparent" because I have no direct evidence connecting the Law to the resolution of conflict, but it is true that intensely conflicted groups of people find effective and amicable solutions in Open Space without benefit of formal conflict resolution procedure, or even any intermediary facilitators. Apparently they do it all by themselves. By way of example consider 100+ Zulus, Haussa, Afrikaners, and Brits struggling to gain an understanding of each other as they worked to create the New South Africa. Or how about 225 federal bureaucrats, state and local bureaucrats, and Native Americans gathered to work out approaches to building roads on tribal lands. Sounds like Wounded Knee all over again, but in fact no blood was shed and the task was accomplished. So what is going on?

Truthfully, I don't know, however I suspect it is the Law of Two Feet at work. Observably, participants intensely engage up to the point that they can't stand it any more, and then exercise the Law of Two Feet. They will walk away, cool off, and come back for more. Apparently the common concern to achieve resolution keeps people together, and the law allows them to separate when things become too hot to handle.

Coming back to the original question: Why does Open Space work? - I don't think it has much to do with the Four principles or The Law of Two Feet. In fact, The Principles and The Law appear to function more descriptively than prescriptively. In other words, and as strange as it may sound, both the principles and the law simply acknowledge what people are going to do anyhow. If there is any substantive contribution derived from either principles or law, it is merely to eliminate all the guilt. After all, people are going to exercise the law of two feet, mentally if not physically, but now they do not have to feel badly about it. By the same token, meetings will start when they start, regardless of what the clock says - so why feel badly about it. Just get on with the business. Truthfully, the elimination of major pieces of guilt and blame can go a long way towards the enhancement of group function. But not far enough to explain the quantum jumps in productivity typically experienced in Open Space. Something else is going on.

That "something else" is, I believe, self-organization. Ever since Meg Wheatley published *Leadership and the New Science*, excitement around self organization and complexity has been building. One of the oddest manifestations of this emergent interest is the number of

people who have apparently dedicated themselves to the organization of self-organization. I think there is something wrong with this picture. Either there is such a thing as self organization in which case, why bother. Or there isn't - and why bother.

I have a growing, perhaps nagging, suspicion that there is no such thing as a non-self-organizing system, at least in the natural world, which would include us. Should this be true, then much of what we are currently doing under the heading of "getting organized" is rather a waste of time, and the potential implications are fairly mind-boggling. Regardless of the accuracy of my nagging suspicion, I feel quite confident that the phenomenon of self-organization lies at the heart of Open Space.

One of the more significant players in the growing field of self-organizing systems, also known as Complex Adaptive Systems, is Stuart Kaufmann. Kaufmann is a member of the Santa Fe Institute and a biologist by training and profession. He has set for himself the modest task of figuring how life may have emerged from a rich stew of molecules, way back when. The details are contained in his 1995 book, *At Home in the Universe* (Oxford). Admittedly, he is a biologist, working with biological systems, and therefore somewhat removed from the realm of human systems. I am by no means sufficiently expert to judge the validity of his findings, although his colleagues seem to take him quite seriously. In any event, scattered amongst some very esoteric biology and interesting mathematics are what I take to be Kaufmann's understanding of the essential pre-conditions for self-organization. Nowhere does he state them exactly as I will, but I do think I have the flavor.

The essential preconditions are: 1) A relatively safe nutrient environment. 2) High levels of diversity and complexity in terms of the elements to be self-organized. 3) Living at the edge of chaos, in a word nothing will happen if everything is sitting like a lump. 4) An inner drive towards improvement, hence if you are an atom it would be useful to get together with another atom to become a molecule. 5) Sparsity of connections This one is a little hard to visualize and was a real surprise to me. Kaufmann is suggesting that self-organization will only occur if there are few prior connections between the elements, indeed he says no more than two. In retrospect, it seems to make sense. If everything is hardwired in advance how could it self organize?

Kaufmann's preconditions for self organization in no way prove that Open Space works. But there is no need for that as people all over the world, in thousands of situations, know that it works. Indeed the fact that it works seems to be the problem, eliciting the natural question, why? It is in answer to that question that I find Kaufmann's observations most intriguing.

The intrigue derives in part from the similarity of what Kaufmann is saying and what I have said for almost a dozen years when asked what are the appropriate conditions for using Open Space. My answer has been: Open Space is appropriate in any situation where there is a real business issue to be solved marked by high levels of complexity, in terms of the issues to be resolved, high levels of diversity in terms of the people needed to solve it, high levels of conflict (potential or actual), and there is a decision time of yesterday. Given these conditions, Open Space is not only appropriate, but always seems to work.

Without going through a point by point comparison, I would like to believe that Kaufmann and I are looking at pretty much the same phenomenon, albeit in very different realms. And of course, that phenomenon is the process of self-organization. The one thing I missed, but Kaufmann saw, is the necessity for sparsity of connections. I had noticed, however, that groups with a long standing history of association took to Open Space at a marginally slower rate than groups only recently come together. I suspect that the difference may be traced to the sparsity of prior connection.

So if Kaufmann and I are looking at the same elephant, where do we go from here? The answer, I think, lies in a curious phrase which appears mantra-like throughout Kaufmann's work: "Order for Free." Given the reality of self-organization, the presence of order is no mystery, nor the product of great struggle, it is only what one might expect. In short, order is for free!

Switching from the world of biological systems to the very different world of corporations and other human systems, supposing that order is for free there too? If true, this would mean that most, perhaps all, of our current activities dedicated to system design, re-design and the like, were suspect, and quite possibly unneeded. Talk about paradigm shift and turning the world on its head!

Now back to Open Space. If it turns out that the global experience of thousands of people in an Open Space environment is something other than a massive aberration, it would seem that self-organization in the realm of human systems was an every day occurrence. It is in this light that I choose to view the significance of Open Space Technology. It is not about having better meetings, although that certainly takes place. It is about experiencing the mystery and power of self-organization to the end that we might learn to be at home in this rather strange, possibly new, universe (to borrow the title of Kaufmann's book).

And we have a lot to learn. But our learnings will not be of the sort we have experienced in the past. No longer will it be necessary to learn the fundamentals of self-managed work groups, empowered and distributed leadership, community building, and appreciation of diversity as a resource and not as a problem to be managed. All of these things apparently happen as natural acts in an Open Space environment. We might of course, learn to do them better, but when the essential conditions of self-organizations are met, all of the above just seems to happen, almost in spite of ourselves.

And there is a further learning, all about control. We have been taught forever it seems, that the essence of management is control, and if you are out of control, you are out of a job. Not terribly long ago, the function of management was described as making the plan, managing to the plan, and meeting the plan. All of that adds up to control. It now turns out that we can make any plan we want to, but managing to that plan is an act of frustration, and meeting that (original) plan is not only impossible, but probably inadvisable. Worst of all (perhaps best of all) it turns out that the systems we are supposed to control, to say nothing of the environment in which they exist, are so horribly complex as to defy comprehension. And what you can't comprehend is very difficult to control.

The lesson from Open Space is a simple one. The only way to bring an Open Space gathering to its knees is to attempt to control it. It may, therefore, turn out that the one thing we always wanted (control) is not only unavailable, but unnecessary. After all, if order is for free we could afford being out of control and love it. Emergent order appears in Open Space when the conditions for self organization are met. Perhaps we can now relax, and stop working so hard.

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## Working in Open Space: A Guided Tour

*Our last grasps at controlling people and organizations are slipping into the swirls of constant change and we are quickly discovering that in this new reality, simple conversation qualifies as real work -- and is essential for powerful, profitable action. As specialization and customization increase, complex webs of relationships and information emerge, pressure for frontline decision-making and on-time delivery rises, and the best work of every individual becomes essential for overall success, it's never been more important to be connected -- and reconnected -- with our partners at work.*

*Open Space Technology is a simple, powerful way to catalyze effective working conversations and truly inviting organizations -- to thrive in times of swirling change. What follows is a unique narrative tour of an Open Space event that highlights those things that are common to nearly every Open Space meeting AND points out a number of ways of and possibilities for fitting Open Space into any organization, setting or situation.*

*Think of this story as an Open Space adventure with a seasoned, but blindfolded, guide...*

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Welcome to Open Space...look around, please, and see who's here. Imagine that you're sitting in a circle of friends, colleagues and perhaps some strangers, too. It might be just a dozen of you for a one-day working conversation, but perhaps it's 120 or even as many as 1200 gathered for a 2 1/2-day strategic conference. If it's just a few, we might be in your office conference room or a small hotel meeting place. If it's a very large group, we're likely in a hotel ballroom, a high school gymnasium, or even a warehouse facility that your company has cleared out especially for the work of this conference.

However many are here and wherever we might be, our chairs are certainly set in one large circle. Even if the circle has several concentric circles, the room is set, from the start, so that everyone can see and hear everyone else. The middle of the circle, even if it's very large, is empty and open. There are no tables or podiums, but you can see that there are half sheets of flipchart paper and markers on the floor in the center. Then you notice that someone has apparently already been busy with these markers, as there are handwritten posters hung on every wall...although there is a large (and a little suspicious) blank area that fills most of one wall under a banner that says, simply, "marketplace."

Someone sits down next to you, probably an old friend, somebody you know, but perhaps haven't seen for awhile. You begin a conversation, "well, hello...good morning...I didn't expect to find you here...gosh, how long has it been, how are your kids...well of course I should have known you'd be interested in this...how did you hear about it...I thought of you when I first saw the invitation...glad you were able to move your schedule to be here...wouldn't have missed this for the world...what do you suppose is going to happen...not sure, but I know we need to do something about..."

Your conversation is repeated around the room as others arrive and connect. They join you sitting in the circle or stand at the edges, talking with people they know or people they are connecting with for the first time. Some are sitting quietly by themselves, taking in the whole scene, glancing at the notes they've brought, or perhaps having a look at a one- or two-page handout that might have been placed on every chair. There is a table with coffee and juice, doughnuts, bagels, fresh fruit. Everyone is eating or drinking something.

And everyone is here for a purpose, having received an invitation and having made whatever simple or grand arrangements it took to get themselves here this morning. Everyone is here because they've chosen to be here, because the theme or issue or question at hand is something they have real passion about -- and because they saw this gathering as a unique opportunity for connecting with others who are eager to learn about, plan for, and take action in an area that they see as critical to the success of their own interests, the work of their organization(s), and/or their relationships with colleagues, customers or suppliers.

The invitation itself was very simple, probably just a page or two, maybe a short email or postcard, or even something posted on a bulletin board. It spoke plainly about what's working, what's possible, and/or what's needed now in some area of real importance. It was clearly not an invitation to complain or even "solve problems," but rather to co-create some dimension of the organization, the community, or the world that we all really want to be a part of. This doesn't mean that it denied or in any way minimized the importance of existing problems, only that it really focused attention on our strengths and assets -- and invited people to work together to create more of them.

If circumstances allowed, you received this invitation well in advance of the gathering date(s), so that you could plan your schedule around it. A late invitation just isn't as open, credible and welcoming as one sent in advance, whatever "in advance" means in your organization. Alternatively, this gathering could be an urgent call to respond to some new situation or opportunity that's popped up. Either way, the invitation announced the theme (purpose or intention) for this gathering and provided a brief explanation (or reminder) about its importance or connection to your life. Perhaps it also invited you to spread the word, to other people you know who are interested in this work.

We should note here that Open Space can only fail for two reasons: if people show up with no passion and/or if somebody tries to control the process in order to achieve some sort of pre-determined outcome(s). And, the commitment to openness, passion and responsible self-organization begins with the invitation process itself.

The theme or purpose on which we've been invited to work was open, broad, and demands a creative, collective response. The invitation was extended to a diverse group of stakeholders and clearly stated the parameters for our work here. And, to the greatest extent possible, everyone here is participating voluntarily, because they have discovered that they have something to learn or contribute to the work we need to do.

The simple, clear, broad and open invitation process assures that the people who show up have real passion for the issue AND signals to them that the best outcomes are theirs to create. A good invitation lets everyone know, even those who can't or won't actually attend, that this meeting is intended to go beyond suggestions, beyond recommendations, beyond rubber-stamping, beyond past expectations. This meeting is for real responsibility, real learning, real action on the issue(s) at hand. Even if the number of attendees had been limited, for financial or other concerns, this could and should have been done in ways that don't limit the passion and possibility of the work.

So, as you look around at the crowd assembling now in the main meeting room, you are aware that everybody in this diverse group somehow received the same invitation, that everybody here seems to have some connection to the theme question, but that nobody seems to really know exactly what will happen next. The level of anticipation and energy rises as the stated starting time arrives and seems to pass, the noise level in room rises, too -- and then a totally new sound rings through the room.

Someone is ringing a small set of bells whose chiming pierces every conversation, even if the group is several hundred. This immediately invites and focuses everyone's attention on the one with the bells, who is standing with a person who nearly everyone in the room knows, or knows of. This familiar person is the leader of the sponsoring or planning group. She introduces herself, welcomes everyone into the meeting and into the circle, perhaps adding a very brief word about why we've all come here today. Then she introduces the bell ringer as the meeting facilitator and takes a chair in the circle with everyone else.

At this moment, the facilitator is, quite possibly, the only one in the room who has absolutely no doubt whatsoever that this group of 12, 120 or 1200 is on the brink of filling that large, suspiciously empty wall with a detailed agenda that will keep everyone working, playing, and learning for the duration of the conference -- on the brink of what most (at this point) would call the impossible. The sense of anticipation and energy is so high in the room that even the sponsors and planners of the event are a little edgy, and eager for the agenda to appear. But first, a few instructions must be given, a few simple principles introduced, one basic law enacted, and a few logistical items explained. All of this, you notice, is also presented on the handful of posters that are scattered around the room.

The facilitator begins with an invitation to do what you've already been doing, looking around the room, seeing who's here, signaling good morning to the people you know and taking notice of any faces new to you. The theme is restated and briefly explained, perhaps a short story of how we got here, with the reminder that everyone you now see in the circle is here because they care about some aspect of this theme -- and have chosen to be here, to learn from and contribute to the work at hand. The facilitator also explains that the big empty wall is, in fact, our agenda. He acknowledges that it is a giant empty space, but reassures us that it will, within the hour, be filled with discussion topics related to the theme. He makes it very clear that all of these breakout session topics will be proposed by us, the people now sitting in the circle. The logistics of this are equally clear.

While the reality of this responsibility sinks in, the Four Principles are explained. What seemed strange when you read the posters earlier, now seems to make a lot of sense. "Whoever comes is the right people" acknowledges that the only people really qualified or able to do great work on any issue are those who really care, and freely choose to be involved. "Whenever it starts is the right time" recognizes that spirit and creativity don't run on the clock, so while we're here, we'll all keep a vigilant watch for great ideas and new insights, which can happen at anytime. "Whatever happens is the only thing that could have" allows everyone to let go of the could haves, would haves and should haves, so that we can give our full attention to the reality of what is happening, is working, and is possible right now. And finally, "When it's over, it's over" acknowledges that you never know just how long it'll take to deal with a given issue, and reminds us that getting the work done is more important than sticking to an arbitrary schedule. Taken together, these principles say "work hard, pay attention, but be prepared to be surprised!"

The one law is The Law of Two Feet. It says simply that you, and only you, know where you can learn and contribute the most to the work that must take place today. It demands that you use your two feet to go where you need to go and do what you need to do. If at any time today, you find that you are not learning or contributing, you have the right and the responsibility to move... find another breakout session, visit the food table, take a walk in the sunshine, make a phone call -- but DO NOT waste time.

This simple rule makes everyone fully responsible for the quality of their own work and work experience. It creates bumblebees who buzz from session to session, cross-pollinating and connecting pieces of the work. It creates butterflies who may not join any

formal sessions, choosing instead to float at the edges. They create the space for everyone to appreciate the energies and synergies unfolding in the work of the conference. Sometimes the most amazing solutions seem to come out of nowhere -- so that's where butterflies tend to look for them.

After a quick logistical review, the facilitator invites anyone who's ready to come to the center of the circle, grab a marker and a sheet of paper, and write down their burning question, passionate issue, or great idea. To the surprise of many, a number of people spring from their chairs and are quickly on all fours in the center of the circle, scribbling their offerings. As each one finishes, they read their issue(s) out loud. These aren't speeches; just simple announcements. "My name is \_\_\_\_\_, my issue is \_\_\_\_\_," and we're on to the next one, while they tape their sheet to the wall and assign it a place and a time (from a pre-arranged set of space/time choices). This is how even very large groups can create two or three days of agenda in just one hour. As the wall fills, those who were at first surprised, find words for their issue and grab a marker. And then, as fast as it started, it's done.

Having done the impossible in the first hour, the energy level is pretty high now. The facilitator gives a few more instructions and the whole group moves to the wall and signs up for the sessions they want to attend. Minutes later, the first sessions start without any announcement or instructions, because everybody knows where they need to be. Suddenly the large circle is many small circles, in the corners of the room or in separate breakout spaces, each working on some important part of the main theme. Every session has been proposed by someone who really cares about that item and has taken responsibility for making sure it gets addressed. In longer meetings, the convener is also responsible for recording the main points and conclusions reached in his or her session.

As the first sessions finish, at roughly the scheduled time, the second sessions begin. If the work isn't finished, it continues or a sequel is scheduled. Some people have spent the entire 1 1/2-hour session on one topic; others have bumblebeed or butterflyed around, connecting different issues. Everything is moving -- people, ideas, resources, beliefs, relationships -- but it all revolves and relates to the intention stated in the invitation. This motion ebbs and flows, but the work continues, session after session. In multi-day meetings, everyone also assembles in the morning and evening for short "news" sessions, where things like new sessions, major breakthroughs, and dinner plans can be announced easily.

In some events, especially longer events, the proceedings are captured by computer. The person who convenes a session also takes responsibility for capturing the notes and typing them into the computer. The rule-of-thumb is that one day in Open Space will get you a lot of great discussion, two days will give you time to capture what happens in a typed proceedings document, and a third day (usually a half-day) will allow a more formal convergence to specific plans for immediate action.

In some cases, smaller groups might create handwritten proceedings to be typed up after the event. With larger groups and longer meetings, where follow-up and follow-through is critical, the typed proceedings can be dumped into an intranet format where future meetings can be announced and progress reports added onto the original proceedings. Over time, these proceedings on an intranet system also make a powerful orientation and training resource, at both project and organizational levels.

In the closing circle, everyone in the room attests to the fact that, together, we have done what most thought was impossible. Specifically, we have...

- identified, explored and addressed all of the most important issues,
- gathered new ideas, resources and people and connected them to these issues,
- documented all of this in somewhere between 5 and 500 pages of notes and next steps,
- established strategic themes, clear priorities, immediate actions steps
- distributed all of this information to a (re)energized and action-ready community of people
- empowered them to tell that story to the rest of the organization, community, or world, and
- seeded cycles of invitation that will continue to pull people into places where they can maximize their own learning and contribution.

Longer term, with care and feeding, the realities and practicalities of the Four Principles and The Law of Two Feet can permeate the organization, inviting people at every level to turn attention into value, planning into vision, movement into learning, management into leadership that makes a real difference. These things are, however, easy to see and tough to measure.

Therefore, you'll need to measure the success of Open Space the same way you measure everything else you do, in terms of product development time, process cycle time, employee and customer turnover, total sales or volume of service, profit margin and any other ways that make sense. After all, we don't "Do Open Space" just because it's fun. We do it to invite important projects, relationships, strategies and measurements to move quickly in positive new directions.

Hailed for its utter simplicity -- and it's power, Open Space starts with open-minded leadership, an issue that really matters, and an invitation to co-create something new and amazing. What happens in the meetings is high learning, high play and high productivity, but is never pre-determined. And what emerges, over time, is a truly inviting organization, that will thrive in times of swirling change.

## Youth Action: Organizing in Open Space

*It was late October and too cold to be out without coats, but there we were, pacing in the dark of a parking lot. My good friend and colleague, Brian Reilly (Program Officer, The Johnson Foundation) was fuming about being accidentally locked out of his new house. Personally, I was glad to have the time to talk, so I kept pulling his energy back to his work and what he wanted to do with his role in Sustainable Racine, a whole-community redevelopment project in Racine, Wisconsin. Eventually, we got around to his passion for youth leadership. What emerged over the next many months turns out to be one of my favorite stories of organizing in open space.*

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In line with his passion for youth leadership, Brian had been talking to a number of young people in the community. He really wanted to get them together and get them more involved in the work of Sustainable Racine. We went round and round in the parking lot...intentions, resources, history, opportunities, intentions, invitations, history, intentions, opportunities...and finally to a plan.

Four weeks later we met again, for the first youth conference, and first Open Space meeting, ever hosted by the Johnson Foundation at their Frank Lloyd Wright-designed Wingspread Conference Center. Thirty-five youth, ages 12-22, came to participate in the four-hour meeting. In true Open Space style, they self-organized and self-managed an agenda of 14 of their most important issues. They captured hand-written proceedings and typed a contact list so that they could keep in touch beyond the meeting.

Though their interests and proposed activities were later clustered into six major areas for future work, the dialogue in the closing circle focused on an immediate opportunity for action and recognition. A 23-site, all-Racine meeting was already scheduled for a Saturday, about six weeks later. With that in mind, the group decided to table their main interests and put all their efforts into getting as many of their peers out to represent the youth perspective at the all-community meetings day. Everyone pledged to contact at least three friends.

An estimated 1,000 people showed up to participate the multi-site dialogues, about 100 of those were youth. Another 3,000 people watched on TV. Afterward, 12 out of 100 people selected for the 'visioning committee' were under 25 years old.

This felt like the first success for the youth group, even as they continued to debate whether they were a 'process' or an 'organization.' By choosing to call themselves 'Youth Action,' they made sure that the debate didn't slow their activity. Another direct result of the first meeting was the emergence of a 'youth art' newsletter.

Going back to that first meeting, one of the major issues for the group was skate boarding. So when the development of a new skateboard park hit the newspapers, some members of the group worked to inject their interests into the discussions of donors, developers, planners and architects. In the end, the youth involvement made the front pages of the local papers and the park location has been moved from its proposed industrial park site, to a more desirable downtown park location.

In May, the group gathered for their second large-group session in Open Space and returned to work on their six main issues: art, internet access, the construction of a youth

center, skate boarding sites, sexually transmitted diseases, and environmental issues. They also added an important seventh issue: growing their circle(s).

This second meeting was scheduled from 5:37p to 8:04p, in an effort to remind parental chauffeurs that "whenever it starts is the right time" and "when it's over it's over, and when it's not, it's not." (The first meeting had run over by about 20 minutes, for which a number of folks apparently took some heat.) At this meeting, the group grew to more than 60 members who recommitted themselves to looking into similar projects in other cities and to finding adults and other resources within the Racine area.

When they reconvened in July, still in Open Space, they brought the fruits of their research and resourcing efforts and the group expanded to 75, including some new adult supporters. This meeting was also significant in that two girls in the group did the honors of opening the space. (Brian had facilitated the second open space meeting.)

These girls' leadership efforts and open space facilitation work with the group also earned them an invitation to attend a national conference sponsored by the YMCA Earth Service Corps (a cutting-edge youth led, adult supported, environmental- and service-learning program). There, they knock the socks off of an impressive gathering of youth leaders and adult supporters. Folks were so interested in their stories and successes with Open Space, that a block of time was cleared in the conference schedule so that the girls could demonstrate Open Space Technology. They opened a small space there for the 100+ participants...a little too small a space, actually, for one breakout group that focused on 'race relations,' which could have gone on much longer than the scheduled time available.

Currently, it seems that this group is becoming an important cluster of activity within the overall Sustainable Racine effort. They expect to keep meeting formally, in Open Space, every two months or so, with lots of informal, supporting conversations in between. A special meeting with an architect for their proposed youth center is also in the works, with the support of the Sustainable Racine project office. Finally, efforts also are being made to establish a Racine Chapter of the YMCA Earth Service Corps.

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This story's come a long way from that cold parking lot and Brian's three-paragraph invitation, last November. And it may be just beginning. If this is something you'd like to see happen in your community, email Michael Herman, who can connect you with Brian and the youth leaders in Racine. You might also be interested in visiting the YMCA Earth Service Corps (<http://www.yesc.org>) website or emailing YESC Training Director Charlie Murphy.

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**UPDATE: August, 1998...this just in from Brian, via email...**

"Good news--open space as taught to Earth Service Corps people by Dana and Becky replicates itself. I heard from a woman today who has used it several times in Minneapolis! Funny. As in funny-cool, not funny-ha ha..."

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**UPDATE: May, 1999**

In April, 1999, three youth leaders attended one day of the Chicago Open Space Training Workshop, where they shared their learnings and questions with other leaders. This helped them prepare for a presentation they made at the National Town Hall Meeting on Sustainability, in Detroit, Michigan, in May, where they shared their stories and did a short demonstration of the Open Space Tech process. Work continues on the development of their YESC chapter, currently the largest chapter yet established.

## So what do you want to become?

Open Space Technology enables groups of any size and mix to do extraordinary work together, but it need not be the occasional treat or the last ditch effort to save the day or put out a wildfire. Indeed, what happens in Open Space is simple enough to do everyday and powerful enough to help people and organizations become what is needed most.

To approach everyday work in the spirit of Open Space, is to make some simple, though subtle shifts. We shift our attention from what is wrong to what is right, from problems to what's working, from what we want to go away to what we want to be, from what scares the bejeezus out of us to what really excites us, from perpetual firefighting to purposeful goldmining.

We write open invitations, little maps to the gold, sharing our desires and dreams, large and small, and posting them for everyone who might want a bit of the gold we're after, who might be able to help dig and carry. These simple invitations, shared in emails and bulletin boards, begin conversations with the people who share real passion and are willing to take responsibility for making something important happen.

Then we keep that passion closely linked with responsibility, "what do you want?" with "what are you willing to do about it," put your money and time and energy where your mouth is, and "great question, good idea, why don't you take care of it?" -- at every level of the organization.

And lest we get overwhelmed by all there is to do, we continually remind ourselves that less is more -- that continually looking for one more thing to NOT do needn't sacrifice hard business results, on the altar of softer people objectives. 'More easy' need not equal 'less effective.' Indeed, it usually means we can have more of what we want with the same amount of effort and resources, or can have all we have now for less. But we have to be willing to say so openly, invite it explicitly, connect it closely, and practice it continually in the open space of everyday living and working.

Imagine sitting on the porch, blowing bubbles in the afternoon sun, with a young child. If it's only about the bubbles, it might get old in a few days. But if sitting in the sunshine and blowing the bubbles are allowed to become the backdrop, the gathering point, the ritual that allows us to discover what happened at school today, it will be new and different everyday. Imagine, then, what that child will grow into by blowing bubbles everyday.

And so it is with Open Space Technology, which is not really about the bubbles, the events, the principles, processes or proceedings documents, but about shining some light on what we really want to -- and really can -- become in organization, in open space.

## ...and where to begin

In my experience, in a variety of organizations, it begins with some happy endings, with making my own individual list of "what's working," BEFORE we make the list of what's "to do." I update both lists weekly, or even daily when things are really moving. And I like to post my lists or otherwise make them as open and accessible as possible, so everyone knows where I think I'm going. As often as not, the things-to-do are really the questions-that need-answering and my lists are an easy way to pose those questions to the people and groups who will make up the answers.

These lists also make it possible for me to call meetings with a clear purpose, because I see something that needs doing that I can't accomplish by myself. I invite everyone I think I need to get something done or who would be interested in what's happening. The people who can't make it probably don't have time to help, so I'd rather have them not show than make them attend and press them to sign up for action we both know they just don't have the time, energy, or whatever to get done. The truth about what is not going to happen is as important as the truth about what is.

Then I begin each meeting by inviting a rapid-fire, just-in-time, up-to-the-minute, conversation to create "what's working" and "what's most important to do" lists for the group. If my own list is up-to-date (which is different from being complete or correct), then I've got all the information I need to make this invitation and lead this conversation. And even if you don't get to discuss everything on the list, everyone still leaves the meeting crystal clear on the entire vision, so any items not covered can happen more easily before the next meeting.

At the end of every meeting we create a "who's-got-what-by-when" list which is distributed to everyone immediately after the meeting. This list, and all progress or non-progress on the issues identified, becomes fodder for the "what's working" and "what's to do" lists at the next meeting.

And finally, as the world changes, we keep in mind that less is more and are not afraid to let individual tasks fall off the list before we finish them -- regardless of sunk costs, individual egos and organizational politics -- if and when real changes in business needs render them irrelevant. We use the law of two feet and literally walk away from those things that no longer provide real learning or contribution, for ourselves, our customers and/or the organization.

Call it a practice in paying attention -- a continual identification and documentation of the organization, department, or project team's bliss, the regular posting of strategic invitations and hosting of strategic conversations. As we do this practice, we move closer and closer to what's REALLY most important at work, closer and closer to the crest of our evolutionary wave. And as our little wave gathers momentum, it's only natural that we'll find ourselves making lists of bigger questions and inviting more and more different people into the circle to address them.

It's not always easy, but it's not a bad place to be, either.

## Embodying Open Space: It's Already Now

We can appreciate open space stories. We can read articles and books and begin to understand how it works, perhaps even envision using it in places where we live and work. If we go further, we can enact open space in those places, go through the motions of writing the invitation, walking the circle, explaining the principles, opening the marketplace. We know that if we do this, we get better meetings, toward better organizations. And still there is more; there is the potential to embody openness, movement, spaciousness and power in organization, as organization. And this embodiment starts with one individual, a facilitator, a leader, a manager, perhaps, but not necessarily.

To understand the difference between appreciation, envisioning, enacting on the one hand and actually embodying on the other, the practice gets so much simpler than open space technology, or even blowing bubbles. It starts with one person, you or me. It starts as simply as yawning, yes, yawning. We've said open space technology runs on four basic mechanisms: circle, bulletin board, marketplace and breathing. The first three, however, get most of the attention. So now, it's time to focus on the heart of it all. Breathing. Really spirited breathing. Breathing that takes your breath away. It's called yawning!

The practice can be as simple as taking a few minutes to yawn one hundred times or taking five minutes four times through the day to do nothing but yawn. Let yourself yawn as big and open as you can on each inbreath. Let yourself say 'aaaaahhhh...' as loudly or softly as feels good on each outbreath. If you're able to have a few minutes of napping after each yawning session, the benefits will sink in deeper and last longer. And the benefits are many, but you can discover them for yourself.

We have said that open space is a practice in invitation. So invite yourself to yawn. Open a bigger space inside yourself. Stretch a little. We've said open space is about finding one more thing to NOT do. Yawning is a great way to not DO anything. We've said it's a practice, this opening of space. And yawning, too. Can you yawn on every breath or does it take some practice. Are any yawns the same? And we've said open space is about letting go of traditional control. Are the best yawns not spirited little moments when your breath seems to take you away, as you ease up to an edge, slip over, and then come back renewed, stretched, open, bigger? These are just a few of the ways that we can begin to embody the invitation, practice and letting go that are open space. But open space is also about passion bounded by responsibility, so you'll have to practice this yourself to really embody the spaciousness of it all.

And as you do practice, five minutes here, five minutes there, see if you don't find that all this yawning leads to what you might call a better way to be alive as body, in the same way that open space technology, invited, practiced, surrendered doesn't lead to better ways to be together as an organization. You might notice how many times you're able to have big, climactic, breathtakingly stretchful yawns in that five minutes. You might notice how long your 'five minutes' really lasts. You might look around in your body to see what shifts occur away from the apparent center of your yawning. Notice, perhaps, what you do with your attention while you yawn. Where do you focus, concentrate, cajole or otherwise try and effort? Does it help? And finally, notice how you are with others after one of these sessions. Does it help your work? Does it radiate?

Then look to see the same subtle shifts in organizations in open space. Yawns and other openings happen already, all the time. But the intentional, invitational practice of these kinds of little, momentary, subtle surrenders still hold great potential. Or more accurately,

we all have great potential for spacious, easy movement. The heart of the challenge of opening space in organizations and communities, however, seems to begin with an invitation to ourselves... to breathe, to stretch, to open, to yawn. And I think the spirit that moves organizations in open space must come from deep down inside of all of us, from the same place that those big, stretching, catching, deeply satisfying yawns come from. All we need to do is find that place, to find that we already embody it all...yawn...aaahhhh.....yawn yawn yawn yawn....ah ahahahahahhhaahhaaaaaahhhhhh...oh!

Our open, yawning spaces resonate deeply, ripple out easily, radiate brilliantly ...through body, in organization, as community ...aaaahhh...hhhaaaa...

\* \* \*

Body rests like a mountain  
Breath moves like the sea  
Heart like the sky

*Thanks to Julie Henderson, who taught me to yawn, after I'd nearly forgotten how. Her work is called Zapchen Somatics. Visit <http://www.zapchen.com> for details.*

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# Opening Invitation

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We must become the change we wish to see  
in the world.

-- *M. Gandhi*

## Opening Invitation as Organization

The best part of Harrison Owen's first Organization Transformation symposium was the coffee breaks. So the next time around, he *intentionally invited his participants* to nothing more than one big coffee break -- and Open Space Technology was born. Intentional evolution, too, is all about seeing what's best in what we're already doing and working toward, naming it in a simple invitation, and opening the space for our colleagues, customers, suppliers, neighbors and friends, to work together, to create more and more of it.

This story is how I've come to understand and pursue what's best in organization: passion, vision, movement, effectiveness. This is the best I can do for now and I'm happy with how it's taken shape. At the same time, however, I know that this story -- and every other invitation, plan and map -- is flat.

In every moment here, I choose but one word, where in fact, it would take many to tell the whole truth. I've tried to *not write* this story for more than a year, but I find that it won't go away, won't leave me in peace. Even so, every time I sit to write, I come face-to-face with the unfathomable odds against my getting it right -- getting it squeezed into the words that will allow *you* to understand what I'm understanding, in a way that *you* can use it in *your* life.

Fact is, there are plenty of days when I can't even explain it to *myself* in the words *I* need, to know just what to do, at just the moment that *I* need to do it. Sometimes it happens anyway. I'd like to think it's a result of all the 'practicing' I do, in my mind, in those moments *right after* I should or could have done something very right. Perhaps the catch is that the moment of doing doesn't really need to be separate from the moment of seeing? But to not pull them apart is an awesome challenge, and who knows what might happen if my trust, my patience, my wisdom and compassion actually succeeded in leaving them together!

So, this is a story that I could not *not write* -- a call I could not refuse -- and yet, one that I know is seeking a level of clarity and certainty that this written world just doesn't allow us humans; seeking a power that can only come when I sit with you and really listen to your story -- as you help me know it and then I tell you mine -- the two of us working together to find the words that lead us to us.

And when it really works, writing this story of ours feels like a slow version of stepping up onto the top of a mountain, breathing the light of a sunrise, or inviting the smile of a little kid -- and saying "wow!" to nobody but myself -- before I can even really think it. It's a time of not doing anything and unavoidably doing something. It's about being powerfully connected to the whole and hopelessly alone in the details of my own understanding of it all; being driven to write even as I see what we really need is conversation you and me, us and them, more and more... about the things we care about most, are afraid we won't get or can't have, and yet must pursue.

And all shall be well, as we post invitations and host conversations, marrying the personal and the strategic. It really does work! NOT because of our planning and efforting -- but because the world really is waiting for us, really is calling for us, to invite it into these conversations. The world is ever ready to create more of what works, more of what is best for all of us.

And when we answer this call for simplicity, (costing not less than everything), we become inviting leaders inviting leadership. Evolution is now and open space. And the invitation and the organization are one. *Please join us...*

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# Appendices

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I hate quotations. Tell me what you know.

*--R. W. Emerson*

**The following Appendices contain various practitioner resources that continue to be updated and improved.**

- A. Talking About Opening Space in Organization (Handouts)
- B. Inviting Real Organizations into Open Space (Samples & Templates)
- C. Facilitating Open Space Meetings and Events (Toolbox)
- D. Books That Changed My Mind (A Reading List)
- E. More Resources Online (Annotated Links)

**The latest versions of these are available at <http://www.michaelherman.com>.**

**See also, the "OPEN SPACE..." topics posted in "michael's open notebook" at <http://www.michaelherman.com>.**

## About Michael Herman

Michael Herman invites the focused attention and flow of activity needed to deliver mission-critical, politically-difficult, needed-it-yesterday, bottom-line results -- in all kinds of organizations and situations -- where success depends on effective use of both human and financial resources. In short, he opens and supports strategic conversations that help people get their most important work done, in spite of everything.

As principal consultant for Michael Herman Associates, Michael has worked with technology, financial, healthcare, community, education, association and government organizations, as large as Lucent Technologies, United Airlines and Abbott Labs and as small as local community groups. Over the years, his practice has evolved from financial planning and analysis, through corporate teambuilding and organization redesign, into managing and learning in open space and cyber space. He specializes in strategic invitation, working conversation, project planning and fast action.

For example, in one situation Michael took on interim program management responsibilities for an agricultural export assistance program. He cleaned up a nine-month collections and paperwork backlog, re-established working relationships with all program participants, rewrote every piece of printed program material and redesigned the entire program data processing system, reduced claims-filing errors (delays and rework) from 70 to 7 percent, and opened a strategic, regional conversation about the future of government-industry partnership in the food export industry.

Other engagements have included the establishment of strategic leadership processes for a division of a Fortune 500 firm, development of financial, database, website and program infrastructure to support the rapid expansion of a Chicago non-profit, the merging of 22 clinical lab departments into four super-departments to achieve critical cost-reductions at a large university medical center, as well as the facilitation of a long list of larger and smaller meetings and events in Open Space.

Michael is an active member and founding webmaster for Worldwide Open Space (<http://www.openspaceworld.org>). He has served as guest lecturer at Loyola University's Masters Program in Organization Development and led workshops for the Association of Quality and Participation, Organization Development Network/Chicago, Midwest Facilitators' Network and the Crossroads Center for Faith and Work. Michael Herman Associates also hosts a number of its own learning events each year, including an Open Space Technology training workshop with OST originator Harrison Owen.

Michael founded Michael Herman Associates in 1991. Prior to that, he worked as a management consultant specializing in healthcare finance and as a leader of urban, wilderness and corporate adventure learning programs for Outward Bound. He holds a BA in Economics, with Honors, from Indiana University and an MBA in Finance and Healthcare Administration from the University of Chicago.

3. *Handwritten signature*