

Introduction to Open Space Technology and Its Use in the user-centric Identity Community

Kaliya Hamlin, Identity Woman - April 24, 2007 at ITU-T Geneva

Open Space Technology is an approach to facilitate convenings described by the following characteristics:

- * **high levels of complexity**
- * **high potential or actual conflict**
- * **high levels of diversity**
- * **a decision time of yesterday**

Unconference.net

Covers Open Space and other group participation tools for conferences.

It is a process that helps groups organize their time during meetings used by groups who have never met before and in long standing communities who do regular work together. There is a schedule formation process that happens at the opening of the meeting, however this does not preclude the active organizing of potential agenda topics and session ahead of time. This talk share some of the background of Open Space use in the user-centric identity community and describe how the process works.

Identity Gang
www.identitygang.org

The technical community innovating user-centric identity began with a mailing list called the Identity Gang. We began meeting in small groups for an hour or two at different conferences like PC Forum and Burton Group Catalyst. We knew it would be great to have our own conference so we began the Internet Identity Workshop.

For our first meeting in October 2005 we did formal presentations for one day 45 min each for all the different protocols and proposals for user-centric identity. This helped us all have time to share our work with everyone. The second day we didn't have a pre-set agenda and used Open Space process to create our agenda together. This format allowed all the technical people to self organize their time and dive deeper into what they just learned about each others ideas.

OpenID.net
The community portal

OpenID is gaining traction as a solution for distributed web-wide Single-Sign-On. The formative meeting that led to OpenID was at this Internet Identity Workshop. The subsequent Internet Identity Workshops provided a forum for continued collaboration and the continued development of other initiatives like the OSIS, Higgins, Bandit, and CardSpace all working towards interoperability.

OpenID explained
en.wikipedia.org/wiki/OpenID

The Internet Identity Workshop has its 4th semi-annual meeting May 14-16, 2007 in Mountainview California.

Invitation to Open Space

Open Space is a way to bring people who have a shared interest or who want to work together to work on something. This means that the invitation is very important and helps frame the whole event. The organizers need to think about who they want at the event and why? It could be just to explore interest in a common theme or it could be to do work together to accomplish a goal.

Internet Identity Workshop
iiw.windley.com

Live Agenda Creation

Open Space opens up the agenda creation process so that all those gathered can put propose sessions. This 'day-of' agenda creation ensures that there is direct relevance to those gathered for the meeting. This is an important feature in fast moving technical environments because the pace of innovation is so rapid for technical communities that are collaborating via, IRC, regular conference calls, wiki's, blog's. and other media it is virtually impossible to figure out the topics that will be hot and need face time six months, three months or even one month prior to an event. Live agenda creations helps them make effective use of face-time during the day of conferences instead of around the edges of events programmed many months ahead of time.

This document was written and compiled by Kaliya Hamlin and includes writings about Open Space by Holger Nauheimer in Open Space Stories from the field and by Scott Benkun on Session Leadership

Even if there is committee of 1 or 3 or 10 they can't 'know' all of what 50-300 people coming to an event around a topic need to talk about ahead of time. One way to address the putting forward of what might be talked about is to post it on a wiki so that people can get a sense of the topics that are of interest to the group before coming.

If you are thinking about leading this process you need to read more about the Open Space Technology method and how to facilitate it because this description alone is not enough for you to be able to "hold the space open" – There is a world wide community of practitioners and many places to read more about it.

Opening Space on OST
www.openingspace.net/openSpaceTechnology_method_DescriptionOpenSpaceTechnology.shtml

Open Space
www.openspaceworld.org

Open Space Technology
en.wikipedia.org/wiki/Open_Space_Technology

Open Space Technology a Users Guide
www.amazon.com/Open-Space-Technology-Users-Guide/dp/1576750248

Space Needed for Open Space

There are several ways you can host space for open space one way is in a large room where you have all sessions going on around the edges. You can also have breakout rooms where different meetings happen but it is helpful if the breakout spaces are as close together as possible. You can also do a mixture of a large room and breakouts.

The Agenda Wall

The organizers make a grid of times and spaces that gets filled during the agenda creation process. When we do IIW's we typically have 5 or 6 one hour sessions in a day with 15 min breaks and a one hour lunch. It is good to have time/space slots for 1/3 the number of participants.

Making the Agenda

The facilitator invites those who have something they want talk about related to the overall theme come to the front write on an 8x11 (A4) sheet of paper the title of the topic and their name. They announce this to the room...people can ask questions about what the session is about and then they put in a slot on the blank schedule. This goes on for about 15-30 min and voila now you have a full schedule.

Navigating the Space

Those gathered then break up and go to the sessions they want and regroup at the end of the day. There are a few principles and a 'law' that help govern how people navigate the shared space.

The principles of Open Space are important to share with those participating.

- 1) Whoever comes are the right people.
- 2) Whatever happens is the only thing that could have.
- 3) Whenever it starts is the right time.
- 4) When its over, its over.

Bonus: Document on the Wiki

Law of two feet: If you find yourself not learning or contributing at any time it is your responsibility to use your two feet to take and find somewhere you are learning or contributing.

These originated to help the day move forward without people getting upset about things being exactly on time or that so-and-so was at there session. The law of two feet is meant to create a social norm about following your inner voice and passion to be in a session or doing something else that you get value out of. It is not meant to condone belligerence towards sessions one is not getting something out of.

Open Space events take the participation of stakeholders in their own affairs seriously, the approach cannot be applied if there is somebody who has all the answers and a master plan in mind. Therefore the task of consultants or facilitators starts long before the actual event: they have to make sure that the mentioned characteristics and pre-conditions apply.

The Engine's of Ospace

Passion – Open Space assumes that if people are encouraged to work on what they are genuinely interested in, their entire passion and creativity will unfold. No passion, no issue.

Responsibility- Those who convene a session in an OS event take responsibility for announcing when and where their subject will be explored and taking care for the documentation of the working group's discussion, agreements, results and further steps. In traditional open space the full documentation of all results is handed out to all participants at the end of the conference. In Open Space this is usually called "The Book of Proceedings". In some contexts an editable website called a wiki is used to document the outcomes of sessions and is available over the internet. See documentation below

Wiki in Wikipedia
en.wikipedia.org/wiki/Wiki

Wiki Tools
Media Wiki
www.mediawiki.org

Social Text
www.socialtext.com

Wik.is
www.wik.is/

Wikia
www.wikia.com

**How to run a great
unconference session**
<http://www.scottberkun.com/blog/2006/how-to-run-a-great-unconference-session/>

Documentation of Sessions

As sessions happen it is important to document at the very least the outcomes on a wiki (The notes of what was said is even better) along with who was in attendance. Photos of any whiteboards are also important along with any slides that were presented.

Types of Sessions

Scott Berkun wrote a great write up on how to run a great unconference session some of these descriptions are drawn from his outline.

Presentation (and Discussion of) formal papers put forward before the meeting. There is nothing in Open Space precluding people from putting forward a session like this.

A semi-talk is a short 5-15 minute presentation by the organizer, used as fuel for the session.

Group discussion Someone picks a topic they are interested in, writes it on the board, and forms an interesting discussion around it.

Show and tell is where the organizer has a cool project, demo, beta, or something to show and let people play with. It's the springboard for all the conversation in the session.

Alternatively, individuals are asked to bring their own thing to show and tell (perhaps with a theme), and the session works round-robin.

Advice for Session Leaders

If you are the organizer don't disappear. If you posted the session it is your responsibility to hold the space for the room. Be the shepherd - visible, as involved as necessary, a beacon of sanity (or insanity depending on the topic).

When leading to a session don't walk in without a position because conversations need seeds. Have some to get the ball rolling. Many start with a 5/7 minute presentation by the organizer on a topic, followed by completely open and free-flowing conversation and debate. Those 5/7 minutes, if interesting, give enough fuel and grounding for everyone to build a session around. A list of thought provoking questions can be a great, low cost bag of seeds.

Don't assume people in the room know more / less than you. You never know who you're going to get. One way to address this is to ask for a show of hands on how long people have worked with, or studied, whatever the topic is. Don't be upset if only two people show up. Those two people are the ones who share your interest.

Session Formats to Avoid

A poorly disguised product demo. If you're going to do a demo, make it obvious. "Fooby 2.0 demo" and don't hide it behind some other topic, making people wonder why you keep steering the conversation back to a product you're waaaaay too excited about.

The introvert with a microphone. If you're really not suited for facilitating a group of 15 people you don't know, partner with someone that is. Or pick a format better suited to your comfort zone. (Hint: if you are a good facilitator, run a session teaching others how to get more comfortable presenting / facilitating / being in front of the room. Doublehint: If you know a good presenter, ask them to run this session).

The zealot with a microphone. If you can't stand to listen to people who disagree with you, get a talk show, or start a podcast - but don't run a session. Unless you set the ground rules, or describe the session in a way that makes your stance known, expect people to either challenge you, or leave the room in frustration. More fun: find a zealot with the opposing view, get a moderator, and have a debate.

Doing of things best done on e-mail or wikis. Having 20 people in a room making a long list of programming languages / cool websites / favorite bands is a waste of everyone's time. Very little of that process benefits from being in a room together.

A bad rendition of a bad blog post. Rants are great if people volunteer to listen: so if you really just want to vent to an audience for an hour, imply that in the session name. But don't let yourself dominate a room or force the conversation back over ground everyone else has happily left behind. Also, the unconference spirit tends to be more about "60 second rants" where everyone gets to chip in, than it is about geek soliloquy.

End of the Day - Beginning of the Next

At the end of the day everyone gathers in one place to share highlights of the day. This is also a time that can be used to evaluate the progress of a group towards goals and to set goals for the forthcoming day. Then the next morning everyone gathers and participates in adding to the agenda for the day with new ideas they have (some slots may have been filled with sessions in the first agenda creating session). Then repeat - those gathered go and do the sessions that interest them...documenting them and cycling back at the end of the day.

Adaptations of Open Space for Technical Communities

Open space can seem very free form and undirected however with the addition of on ramps and next action discernment on either side of open space along with other group process sprinkled in the middle it can support a thriving community that gets a lot done.

On Ramp Opening Session

An "On Ramp" opening session is more like a traditional conference where speakers are chosen and everyone is in the same room. This could be anywhere from one hour to a whole day. This time has several purposes, first it is good to create a welcoming environment by orientating newbies by sharing key terminology and core shared terms of reference. This re-sharing for those who are already part of the community helps develop identity and a re-grounding in the communities foundation. Secondly this can be used to help update existing community members on development in different niches or projects that have been ongoing since the last meeting. It is good to pick the speakers very close to the time of the event one month to one week before hand. This allows for emerging developments to be covered. Thirdly this Opening Session can be used to outline and articulate the goals that would ideally be accomplished with the time together. A process like Appreciative Inquiry could be used for discernment of goals.

Next Action Discernment

If you are seeking to accomplish particular goals or deliverables Open Space can be capped with time (any where from an hour to whole day) to focus on discerning next actions and coalescing project teams or working groups that will move forward beyond the gathering and 'deliver.'

Open Space Pulse

There are several interesting effective large group processes that can complement Open Space for various purpose these include Speed Geeking, Fishbowls, Spectrograms, and Appreciative Inquiry are further articulated on listed on the unconference blog and in many other places on the web.

Reviews of Open Space and the Internet Identity Workshop

IIW 2006 WAS A SUPEREVENT Everyone in attendance was awe-struck by the IIW 2006 that just took place in Mountainview. It was incredible. With Doc Searls and Phil Windely navigating at the macro-level, the amazing Identity Woman Kaliya orchestrated an "unconference" that was one of the most effective events I've ever attended. It's clear that creating synergy out of chaos is an art that these three have mastered, and participants floated in and out of sessions that self-organized around an ongoing three-day hallway conversation - the hallway actually being the main conference room and event! So we got to engage in all kinds of one-on-one (and few) conversations, meet new people, work out concerns and above all work on convergence. Many people told me they felt history was being made, and I did too. - Kim Cameron Microsoft's Chief Identity Architect.

This week I saw a significant "state change" occur in this year and a half "Identity Gang" evolution, and it tells me things are going to start to happen...These efforts were each begun with a very different mission and with a very different use/case and problem set driving them, and this has previously created division and competition. This time, however, it was clear that everyone was looking for where they should get on board, and how to avoid having their goals left out.

- Phil Becker, DIDW Newsletter

Internet Identity Workshop
May 14-16, Mountainview
liw.windley.com

Unconference Blog
www.unconference.net

IdentityWoman.net
My blog covers the "identity"
industry and identity issues
more broadly. The sidebar
includes upcoming events,
resources to learn more about
identity and an annotated
blogroll.