

## OPEN SPACE PROCEEDINGS – 10/28/14 ODN Annual Conference, Philadelphia, PA

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Here are the Open Space Proceedings from 16 sessions that were held at the 50<sup>th</sup> Anniversary Conference Open Space in Philadelphia, PA on October 28, 2014. Harrison Owen, the originator of Open Space Technology (OST), turned it over to 200 attendees to decide what sessions they would convene/attend and when. The overall theme was “*Chart the Future for Organization Development.*” There were five simple principles that guided these sessions:

1. Whoever comes are the right people
2. Wherever it happens is the right place
3. Whatever happens is the only thing that could have
4. Whenever it starts is the right time
5. When it's over, it's over

There is also the *Law of the Two Feet*. This means that during these sessions if at any time they found themselves in any situation where they were neither learning nor contributing they used their two feet and moved to some place more to their liking.

We apologize for any misspellings and other grammatical errors. The intent is to have a record of the discussion but sometimes the deep conversation gets prioritized over taking pristine notes. Many participants would say “you just had to be there.” Usually, the proceedings are available the same day for participants and there is a gallery viewing. There were actually more than 16 sessions but we have not received all of the reports at this time. It still took a bit longer to collect the data from conveners/scribes but the wait was well worth it!

Below are the themes that were convened:

1. What is the learning edge of the OD profession?
2. What will ‘human work’ be, in a future driven by technology?
3. How do we support young leaders?
4. How can we partner with each other in meaningful ways?
5. How do we get people past their biases and into a space of curiosity?
6. Changing systems to end the school-to-prison pipeline
7. Funding OD in the nonprofit sector
8. Value of a mentor in the field
9. Presentation skills
10. Building magical spaces
11. How can we work effectively with complex systems in healthcare?
12. Taking into account the role of individuals when organizations and leaders plan their change effort
13. Global OD
14. Cultural Transformation
15. Funding OD in the nonprofit sector
16. How to organize more like human beings?

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(1)

**Theme:** What is the learning edge of the OD profession?

**Convener:** Suzanne Zaldivar, smz@inspired-inc.com

**Participants:** 15 people (sorry! didn't capture the names!)

### Discussion/Recommendations:

Intriguing questions:

- How to catalyze the culture of the OD profession?
- Why do we repeat the old stuff instead of talk about new stuff?
- How to coalesce insights/observations from blogs?
- Can we bring in people to conferences who have experienced OD and hear from them? Hear from people experiencing the change?
- Are we hiding behind our values?
- Are we hiding behind the academic piece?
- Are we only interested in members who identify themselves as OD professionals?
- Can we expand what we mean by OD professional?
- Is OD the “how” or a professional identity?
- What is the purpose of publishing?
- Can we broaden our profession beyond the walls of OD and North America?
- Who else can we bring to the discussion? What other professions and worldviews do we want to hear from?

### Observations:

- We have calcified as a profession in order to gain credibility – it has led to lack of flexibility
- However, why do we talk more about credibility than impact?
- Are stories just as powerful as studies?
- One company invited people to tell stories in quality meetings.
- We could invite clients to conferences and consult to them in a well-designed way that encourages productive dialogue
- We could set up a virtual community of practice in advance of a conference – why interact just once a year?
- **We need to hang out on the fringes more**
- **Values serve to ground us, but we exclude - are we exclusively inclusive?**
- **We need to bridge paradigms**
- **Everything goes better with OD on it**
- **How do we make OD ordinary?**
- **Let's focus less on the OD profession and more on the professional use of OD**

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- What if OD was free and we gave it away?
- How do we teach OD to others not in the profession?
- How do we learn OD – get inspired by those not in the profession?

(2)

**Theme:** What will 'human work' be, in a future driven by technology?

**Convener:** Margi Gordon

**Participants:** Philip Lohr, Bill Clinton, Kevin (Catholic Relief), Jaan (Netherlands).

### How will technology affect work?

- Big data drives marketing and makes results predictable
- Technology enables loosely coupled systems to thrive e.g., Uber, AirB&B
- Technology enables sharing and reduces ownership e.g., GreenWheels car sharing, Seats2Meat
- Robots will replace people in routine work e.g., Government in Netherlands will stop funding elderly care in 2016, and is telling people to move in with their children or get a robot, to support independence. State owned care homes are being shut down.
- Technology will take out the middle of the hierarchy – middle managers are no longer needed
- Increased connectivity enables self-organisation and entrepreneurialism
- Large corporations (IBM, Amazon, Apple, Microsoft) have huge technological capability and influence

### Questions arising from increased technological impact on work

- Technology currently creates complexity – will there be a bifurcation, where technology both creates complexity, and simplifies and frees up time?
- What will we do with our freed up time?
- How will technology emancipate through connection and information sharing?
- How can we embrace technology in the wider global eco-system?
- How will technology work up the hierarchy – at the senior levels?

### Implications for OD

- OD has a role to play in speaking up about the human side of work
- OD has the opportunity to work with technology in loosely coupled systems

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- OD has the ability/opportunity to generate organisational goals that serve community, not just shareholders
- OD will need to develop and transfer skills to leaders to understand the technology-driven change in organisations

(3)

**Theme:** How do we support young leaders?

**Convener:** Cindy Howes cindy.howes@yahoo.com

**Participants:** Jordan Purpero, Jeff Branch, Mila Baker, Donna Fleming, June Delano

Skills for the future

Readiness to lead now

Millennials want to lead now

Their passion and commitment make us want to invest in their learning

Their passion and commitment make us want to infuse them into the OD Network and the conference

One of our participants was asked repeatedly, “How old are you and what program have you been through?”

Loosening needed for our (OD Network) tightly controlled systems

Millennials are looking for organizations that are aligned with their purpose and passion

The Language of Invitation—from the Intergenerational Learning Exchange on Sat.

Important for both Millennials and Boomers with X as the bridge

Reverse Mentoring—willingness to learn important

Barrett-Kohler Leadership Exchange with authors and young leaders who share their input

*Peer-to-Peer Leadership* by Mila Baker—a more even exchange of ideas and energy and power

e.g., GSK, LRN

began with tech and now spread to many other organizations

Say, “We want them to be the boss tomorrow, not years from now”

But not dictate your contribution—that is not neutral, it is negative other.”—Jordan Purpero

How do we create a space that the experts and the newer practitioners can live in equally?

Support “your” ideas

How feel valued?

Mentoring piece of Sunday AM with the experts showing up was helpful

Build on that into lunch and break sessions to get more than one mentor

Everyone shares what they are working on

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Bring back to the conference other disciplines that are using OD practices to attend. e.g., UArts Design Practitioners  
Older leaders letting go and making space  
“The Gift of Grace” game from the Action Mill on end of life issues

Global

Some disruptions reduced older generations as leaders e.g., China  
Revered role for elders

US

So many Boomers, the role of retirement, will eventually lose many leaders

Who will replace them?

Who do we create a shared leadership model?

Levels of ambition uneven

Takes work

Stay in and mentor, stay engaged

So all of us have a clear role

Programs to help people prepare to ease out of leader roles

Eric Eirckson, author of *Childhood and Society*, in his 90's knew a lot more about aging

How do we end well

CEOs don't well often

Holding on & letting go

Coach for legacy v. coach for development

Founder's syndrome

Finding Meaning

New Leaders—laboratory of experience

Intimidating not to have the credentials

Coach to help you leap forward (2 hr./mo.)

Challenge & motivate

Not make the same stupid mistakes

-Make new mistakes

Track development experiences

Travel with the Senior Executive

Travel with the Salesperson

Built up many highly skilled executives—potential but lost them when there weren't opportunities fast enough

Create new roles e.g., Community outcomes projects so they don't leave—give opportunity & challenges some working with Executives

Different ways to add value

Cost?

Young people will fundraise to meet the challenge

Fund raise to get more younger practitioners to the conference ala PRODN

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-sponsor  
Share presentations visibly  
e.g. New Organizers Institute  
all programs & resources online

**(4)**

**Theme:** How can we partner with each other in meaningful ways?

**Convener:** Maggie Shreve, OD Network of Chicago Treasurer and Process Improvement Consultant at Rush University Medical Center

**Participants:** Mariela Light, Scott Winer, Laurie Ryan, Jackie Vessal, and Argerie Wasilakes

### **Discussion/Recommendations:**

- Depends on how open or closed your organization or function is towards sharing of information
- Can be tricky with independent consultants
- How do we work across siloes in multi-cultural, inter-disciplinary, inter-departmental ways?
- Can choose to partner with people I like or people I can learn from (or both)
- What's best of people and what's best for organizations used to be the OD mantra; now it seems to have become what's best for organizations...period. Focus has shifted.
- How do we change the way people communicate and work now?
- Contracting may be key: how do you know what to discuss and include? We make lots of assumptions about what partnering means and sometimes we're disappointed if not devastated with what we perceive as betrayal.
- Cohorts can be helpful to post-graduates. Learned a lot about each other through the cohort process. How could that be recreated for ODN?
- Networking time at the conference almost seems like a possible waste of precious time: could we make more specific use of that time? For example, ask people to post questions and topics they want to discuss while they are attending the conference; collapse into "themes" and like in Open Space or perhaps a Word Café, post those themes on tables with stanchions. When you enter the exhibit hall or ballroom space, look for the table that has the conversation you want to have.
- Stay connected with regional networks to create local communities where trust can be built over time. If there is no regional network, ask ODN to help start or build one; we hear they may be considering chapter development which had not been a part of the ODN structure in years past.
- Cohorts form in pre-conference workshops, so maybe make more use of those. Promoted them as a way to develop a new relationship that

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enables people to partner throughout the conference and beyond. Goes beyond the current Beckhard mentoring program.

- Start sessions later in the day at the conference – we need more rest and some have to drive long distances. The breakfast, lunch and dinner times can be used for continuing to develop partnerships.
- Tie the partnership concept into the mentoring program.

Here are our email addresses if anyone wants to learn more about our conversation: [Maggie\\_shreve@rush.edu](mailto:Maggie_shreve@rush.edu), [wimer@ucla.edu](mailto:wimer@ucla.edu), [laurie.ryan@verizon.net](mailto:laurie.ryan@verizon.net), [jvessal@mitre.org](mailto:jvessal@mitre.org), [axv124@gmail.com](mailto:axv124@gmail.com)

(5)

**Theme:** How do we get people past their biases and into a space of curiosity?

**Convener:** Howard E. Kea, PhD

**Participants:** Pam, Julian, Robert, Sara, Dorel and Suzanne

### Discussion/Recommendations:

- As a result of the conversation the original question was reframed to be; *“How can we get curious about our unconscious biases”?*
- We also discussed ways of doing this through “Use of Self”, meditation and holding the space when we get triggered or “hooked” by another person’s perspective or viewpoint which is opposite from our perspective (Polarity).
- That polarity is an opportunity to be curious.
- Finally being in a safe space and being courageous enough to be vulnerable can enable curiosity.

(6)

**Theme:** Changing Systems to End the School-to-Prison Pipeline

**Convener:** Donna Fleming

**Participants:** Shavan Blackborrow, Diana Chickonski, Jodi Lanis, Jim Regan, Monica de Vente, Shirley Grass, Alicia Smith, Julie Ropacki, Denny Gallagher, Christopher McCullough, Terri Werner

### Discussion/Recommendations:

#### Navigation

#### School Environment

- Bill Strickland in Pittsburgh suggests changing and creating new schools that provide hope for the students, a safe place, a refuge
- Expose students to vocabulary and literacy more consistently in their early school years

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### Community/Family Support

- Increase programs to combat drug addiction, culture of violence and other negative behaviors, and to encourage self-worth and conflict resolution
- There is structure through high school and then it ends for those not entering college. When

### Change

#### Grassroots Organizing

- Act Local, Change Global! ... Start with your circle of influence.
- Someone benefits from this pipeline, which is a system built to perpetuate itself. Highlight the costs of maintaining this system
- Aim to shift resources away from the system that feeds this pipeline.
- Seek out community shifts that can provide opportunities for individuals to choose a change

#### Privilege

- System produces winners and losers, and there is a need to engage those who are not directly impacted and also do not get involved (bystanders).
- Engage neighboring communities to publish their involvement – either opposition to the system or support for change

#### Minimum Wage

- Socio-economic issue -- Dispel the myth about boot straps... some people don't have boots!
- Low-income families more impacted with higher levels of poverty of resources, including time
- Employment should allow for young people to support themselves and a family.

#### School Discipline Policies

- Stop criminalizing behaviors of youth.
- Change from a system of punishment to rehabilitation
- Limit numbers of prisons and detach funding that is connected with population growth

#### Public School Funding Policies

- Urban and rural schools are severely underfunded
- Explore alternatives to how we fund schools. Currently get funding from property tax. Why? What would be implications of targeting areas, not cities, for funding?

### As Practitioners

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- What systems need to change? How do we get them as clients? How can we support systems change in these communities and schools?
- Recommit to the work of unclogging unjust systems
- Offer services at reduced cost to community coalitions and groups; not free because there will be some difficult work for which there needs to be internal commitment
  - Faith-based organizations
  - Public schools and educators
  - Communities and families
  - Economic development groups
  - Similarly valued organizations
  - Male mentoring groups
- Pilot a SIG focusing on this particular issue; expand our reach to new entry points to systems

#### Resources

The Wheat Money

The House I Live In

Race: The Power of an Illusion

The People's Institute for Survival and Beyond

The New Jim Crow

#### **(7)**

**Theme:** Funding OD in the Nonprofit Sector

**Convener:** Lianna Levine Reisner

**Participants:** James Shillaber, Michael Maine, Emily Ackley, Marian Lee, Rebecca Lehner

#### **Discussion/Recommendations:**

##### *Challenges of bringing OD to nonprofits*

- Nonprofit leaders are not necessarily in-the-know about what they need for organizational health. Eligibility/readiness requirements for structured engagements are a barrier for entry.
- Year-to-year funding restricts long-term planning and investment; the preference of institutional funders to give restricted project funding vs. general funds further limits nonprofits' ability to invest in OD
- We need to connect the OD value proposition to nonprofit health and impact metrics, just as it is connected in the corporate sector.
- Nonprofit resource providers often provide one-off training that makes little impact because implementation is not supported. The conversation needs to be changed around how to create impact and change among nonprofits through an OD package of supports.

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- Funders and resource providers also often invest in many white papers and reports that have limited impact because they don't necessarily lead to implementation/change.
- There was an assessment that Jewish community brings in well-known names from the national scene to do "OD light" with nonprofits through speaking engagements or trainings, when they could be better served by full OD practitioners working in their home communities who can have a longer-term relationship with those organizations. (Do other segments of the nonprofit community do this?)
- More nonprofits need "growth stage" supports as they move past the start-up phase; both funding and OD services are important at this stage.

#### *Value of OD to nonprofits (just some ideas we discussed)*

- OD tools and practices are particularly valuable for board development, helping board members become engaged around all aspects of the organization.
- OD can help nonprofits focus their impact so that they can get past survival mode.
- OD practitioners can support stakeholder mapping and engagement to keep nonprofit work relevant and on the pulse.

#### *An emerging vision of OD in the nonprofit sector*

- We want to see a future in which nonprofits don't have to choose between buying office supplies and buying OD services
- OD as a package of support: We discussed packaging OD for different points in the nonprofit lifecycle -- start-ups / growth phase / "re-energizing" / navigating away from crisis / even dissolution -- in which the supports offered match the needs.
- The OD package would include a set of measures for what constitutes a "healthy" nonprofit across multiple dimensions (e.g. board composition, financial, structure, community involvement, etc.) to help nonprofits determine what their growth and development should include.
- Nonprofit boards need OD champions. When generating ideas for board recruits, an OD practitioner should be essential alongside a lawyer, accountant, and wealthy supporters. Similarly, no one questions when a nonprofit needs legal support or an IT system: how can OD become normalized?

#### *Ideas for creating access to OD*

- Create an OD mentoring structure for (new) nonprofits to help leaders identify and address real issues rather than surface needs. Just like when people retain the services of a lawyer to start a nonprofit, this

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could be another "given." Someone at the beginning would hold your hand to provide support and coaching, and they could be funded by a match grant (offered through government?) or through incubation (public and privately funded).

- Example of NYC government's economic development department doling out huge amounts of money to bring corporations to the city, including for training. How can government be convinced that nonprofits are economic engines that warrant investment, similar to what is provided to for-profits?
- More foundations, including community foundations, need internal OD programs to meet both funders' and grantee needs. But to reduce conflicts of interest, independent external consultants could be co-funded by multiple foundations to serve their collective grantees. (This is already done in some private foundations, but not all, and not comprehensively.)
- Figure out how to align with Grantmakers for Effective Organizations (GEO), or with intermediaries serving multiple nonprofits to bring OD out as a service
- Clarify what OD is -- what we really do -- to sell it to the sector, not just to large nonprofits that look like corporations. (When OD exists internally in nonprofits, it's usually within the HR department.)
- Create an ODN caucus or affinity group for those working in the nonprofit sector. One of its functions could be to vet OD support for nonprofits, paid or pro bono.
- Partner with Taproot Foundation to put OD into their mix of skills. Learn from the Taproot model to determine if this is one to replicate: structured/vetted engagements. American Planning Association also structures engagements this way: project-focused, matching needs with practitioners, detailed eligibility requirements. Other models discussed were Bridgespan, Community Wealth Ventures, and Social Venture Partners.
- Provide free flash/speed consulting as a way to get nonprofit leaders in the door and identify real issues, as a stepping stone to deeper engagement (could ODN also do this?)
- Overcoming "how can I get this for free?": even with a sliding scale for nonprofits, it's important to show what the full cost of the service is to help leaders value it -- transparent conversations about cost are essential

**(8)**

**Theme:** Value of a mentor in the field

**Convener:** Scott Wimer

**Participants:** ?

Challenge at staying current

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Connecting with local organizations  
Information sharing within a group of internal colleagues  
Going back to basics - revisiting fundamental models  
Teaching

Value of additional degree/coursework where appropriate Blogs, other ways to stay connected virtually OD Practitioner

Actually, in my opinion these notes don't really capture the richness of our conversation - it was a very helpful conversation.

(9)

**Theme:** Presentation Skills

**Convener:** Jacqueline Tusman

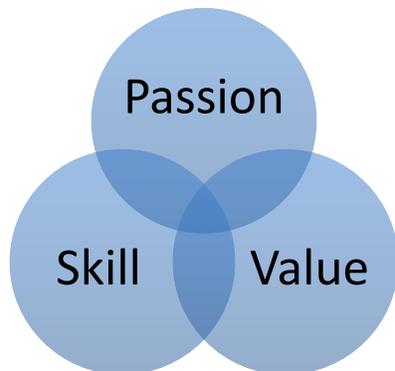
**Participants:** Bob Faw, Kevin Lamb, Dylan Dalton, Sofia Arens, Ivonne Mejia

### Discussion/Recommendations:

1. Use your own passion and skill to add value.

Everyone can find a way to use their own skills and strengths when making a presentation.

- Find what you are best at and passionate about and that adds value to your audience. Enhance and expand on that.
- You are unique and everyone has a unique value to add.



2. Let your strengths come through.

Present using your own unique way of presenting – whatever that is.  
Some examples include:

- Insightful at presenting data
- Ability to be funny
- Distilling complicated information into small bits

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- Connecting to your audience and aiding them in connecting with each other
  - Ability to help clarify concepts
  - Big picture person – connecting the dots
  - Being pragmatic (According to Merriam Webster, Pragmatic means: dealing with the problems that exist in a specific situation in a reasonable and logical way instead of depending on ideas and theories.)
  - Good at drawing graphic representations
  - Storytelling
  - Discovery – What scientists and engineers like to do
  - Energy
  - Topical passion – a movement or a cause
  - Speak more softly. Here is why occasionally speaking softly is often a good practice in presentations:
    - Your audience will become still.
    - Your audience will intuitively focus and lean in so that they can hear you.
    - Your audience will want to listen and trust that the information you give them is not being hammered into them.
3. Your Audience – Do an audience evaluation ahead of time so that you know what they really want from you.

Call 5 to 10 audience members depending on the group size. (Ask your group contact for these names.)

Some questions to ask include:

- What do they most want to learn about the topic?
  - What words are relevant to their industry, department, company or cause?
  - What words are not relevant to their industry, department, company or cause?
  - In the past, what did this audience like best about a speaker for this group?
  - In the past, what did this audience not like about a speaker for this group?
  - Is there anyone in this group that is being sent by management to be “fixed” by this presentation?
  - What is the most important background info you need to know about this group?
4. Culture Competencies – How to be culturally aware of your audience.

Some things you should focus on:

- Relationships – high context (Ex: Concentrate on the personal relationship. Make a big welcome, be super friendly, ask about their day so far, etc.)

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- Tasks – low context (Ex: Concentrate on the data, message, evidence, experiments or facts. Don't concentrate on the personal relationship.)
- Touch/Space – Always be aware of how much personal touch is accepted. (Can you touch their arm when you talk to them? Is "close talking" acceptable? etc.) Also, be aware of the correct amount of personal space people prefer in this culture. Gender should also be considered.
- Eye contact - Is important in the US because it indicates trust. Eye contact is not acceptable in many cultures because it is too invasive, can be misconstrued as disrespectful or sexual in nature.
- Above all, show interest and curiosity about the culture you are in.

#### 5. Some things to keep in mind before you present.

- Balance authenticity – Say, "I'm sorry" when appropriate.
- Don't walk into a presentation with fear.
- Show respect.
- Keep your credibility – don't curse, use other inappropriate language or be unprofessional.
- Be direct - don't give a lot of background on how you got to your conclusions.

#### 6. Non-verbals (Body language)

- Tune in to your audience
  - Watch their body language for boredom, that they need to be energized or that they don't understand your concept(s)
- Be aware of your own body language. (Please Google *presentation body language* for information – There are too many to list here.)

#### 7. Power Poses

Before the program do something to aid in feeling powerful and energized: These should be done beforehand and out of sight of your audience.

- Cheer "YES" loudly and jump up in the air
- Sit down with hands behind your head and your legs casually open
- Use the "cop pose"; hands on hips, legs splayed
- Think about an audience that may be similar to this one and where you had success
- Decide why you like to present to this type of group

Please note: Although not exactly the same, most of this information can be applied to a facilitator who is facilitating a training program.

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(10)

**Theme:** Building magical spaces

**Convener:** Colin Robertson

**Participants:** Sarah Sontheimer, Jim Lemming, Shirley Grass, Kathy Garrett, Sean Lydam, Suzanne, Melissa Catrell, Jennifer Kerr, Karl D., Anise, Jodi Lanis, Dorel

### Discussions/Recommendations

Beginning story: I grew up in a house where my father practiced psychoanalysis. I was not allowed to see the people who would come to see him in his office and I did not know what happened when they spoke. I remember looking up the stairs at the closed door. I also remember sneaking in to read his notes a few times. I came to know it as a magical space, where people walked in, and they talked, and they were healed. I have always wanted to know, what happens in these spaces? And further, how do we build magical spaces?

Here are some of the themes that emerged from the discussion.

There was a view that to make a magical space the person creating the container has to be authentic and thus vulnerable. The use of self is important.

We began to question whether "building" is the appropriate metaphor, or should it also be that we can build containers so that the magic that is natural in all events and relationships is uncovered. Reference to Ron Lippitt's book on laboratory training offered a precise set of instructions to get the physical space just right to "uncover" this magic.

Ideas of play, wonder, surprise, art, story telling and mindfulness were all ways into magical spaces.

Christina Baldwin has named the circle as an archetype that, when formed, acts as a call to convene, and that we yearn for this and react strongly to placing ourselves in circle.

That many of the organizations we work in can be seen as doing things that "cover" magic. We began to recognize the contrast between the weather, this magical, unpredictable, and ever changing event, and how we ignore the weather in most of the buildings/spaces in which we work. The ever changing weather, the cycles of the sun and the moon and the earth itself, is contrasted with the set hours of the regular 9-5 work day that we have instituted.

That there is mystery in these spaces that are created.

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That despite experience that celebrates the building of magical spaces, one of us shared that she still feels a certain shame when contemplating bringing magic into organizations.

That people felt the word magical was brave in the context, that they appreciated speaking about it, and using the word itself to describe their experiences.

**(11)**

**Theme:** How can we work effectively with complex systems in healthcare?  
e.g., client request to create integrated joined up health and care for frail older people from across current 12 separate funding and delivery organisations for area covering 350000 people

**Convener:** ?

**Participants:** about 8 - 10 people. Barrett, Bob, Beulah, Kerry, Carla, Ted, Mary, Lisa, Alastair, plus couple of others.

**Discussion covered:**

OD contribution and tools to convene conversations across multiple players in complex systems. Informed by stakeholder mapping.

Relationship building critical to bringing people into conversations.

Key challenge is scoping. How to frame issues without being overwhelmed by complexity nor missing critical connections.

Spot complicated or complex situations e.g., logistics for mobilising mercy ship to Haiti Cf how to respond when there to the complex emerging situation on the ground.

Helping people spot the 15% they can influence.

Use of liberating structures

Point of entry?

How can we design conversations and experiences that help shift people's understanding and viewpoints rather than an agreed common action plan (which seldom gets implemented).

Users voice in the room.

Touching people's humanity

Considering OW top middle bottom client perspectives.

AND considering the political power and decision-making so can support and embed change. Loosely and tight coupled systems. Use of power by tops including symbolism.

Summary: working with complex healthcare systems.

Position, Power and decision-making, Experiences to help change meaning for people, Different lens, Space - complicated and /or complex, 15%,

My hypothesis is care of frail older people is complicated and organisational arrangements required to enable this delivery is complex.

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Recommendation:

ODN consider community of practice and/or way of sharing resources for those working in or interested in healthcare.

**(12)**

**Theme:** Taking into account the role of individuals when Organizations and Leaders plan their change efforts

**Convener:** Craig Petrun

**Participants:** Melisa Cantrell, Jane Tutko, Jim Ieming, Aundrea Almand, Manfred Hoefler, Eric Elli (spellings may not be correct?)

### **Discussion / Recommendations:**

- Lean Initiatives – individuals often feel.. how do they participate and have a voice
- Need to help people see change as an opportunity -- allow people to talk about the opportunity they see in the change
- Allow people to express what scares them about the change and then have the leaders/org. respond to their inputs – Can also ask the leaders what do they see as the toughest questions they may get from staff
- Take leaders through the change process – teach them about what individuals will experience when they go through the change process
- Key point – leaders are good at communicating vision – but they need to follow-up with staff and ask for feedback on if the vision and Q/As are understood – this often not done in Orgs... there is a difference between hearing and understanding
- Leaders could speak more confidentially and have greater impact if the leadership teams were aligned... different messages can confuse staff
- For those people who decide to change or support the change – could lead to personal crisis and Org. needs to provide support (training, new rewards) as they go through the change – many times once the change start the leaders and or org. move on to other areas of focus.

### **Role of Middle Managers:**

- Not practical – change needs to occur bottom up – need to ask the front line to get involved and drive the change
- They could collaborate with other Middle managers and engage with leadership, have senior leader champions identified to work with them and be their POC
- May need to offer the exec. coaching and give them tough feedback
- They need to have their questions answered so they can explain to their direct reports – could provide them with a change implementation toolkit (we assume this happens today... they know how to implement change)

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- Leaders need to have a strategic partnership with the Communications Dept. to help them organize and present a consistent message down to middle mgrs. and staff

### Leadership / Role Models:

- They need to give each other permission to hold each other accountable – call each other out when needed but this is hard if they are not used to taking feedback
- Have them role play in meetings – How to speak up and hold each other accountable
- They need more time and opportunities to spend social time together so they can get to know each other.. in U.S. it seems like very little effort is made by leaders to have lunch or dinner and get to know each other
- In other countries – there is more emphasis on forming deeper, longer term relationships with their business partners.... They do more informal/interpersonal things together, coffee... having lunch is an important part of their culture while the U.S. relies more on tools, processes and techniques to coordinate work
- In other countries off sites always have an overnight component and build time into the schedule for relationship building time
- On the FRONT lines today in most companies... staff are not connected to their leaders
- Look at Google and see how they manage to combine a focus on technology and still enable staff to build social relationships.

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**Theme:** Global OD

**Convener:** Barbara Bunker and Mee Yan

**Participants:** 25 people (sorry for misspelling)

James Shillaber, Bill Clinton, Eerika Hedman, Gwen Kenney, Yaap Peters, Gisela Wendling, Ted Tschudy, Margi Gordon, David Sibbet, Suzanne Zaldivar, Samantha Manning, Tim Torneby, Mila Baker, Alastair Mitchell-Baker, Harold Janssen, Rob Fijlstra, Sofia Arens, Bob Fan, Peter Kalmar, Alicia Smith, Ilene Wasserman

Plus others

### Discussion/Recommendations:

- How do we translate OD methods across cultures?
- How is OD evolving around the world?
- Are some cultures/countries embracing OD more than others?
- US point of view is the dominant perspective – and is taken for granted
- To what extent is OD being used to support local cultures?
- Can we create a global learning community?

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- OD benefits when we connect more countries
- What are the global opportunities?
- **Even if we don't consult internationally, the world is coming to you**
- OD values democracy and participation – how does it work in hierarchical cultures?
- Book recommended
- **Reframe the work from either my way or your way to the third way**
- **Technology provides a lot of third way opportunities**
- **Unknowing becomes the third way**
- Cool company in Copenhagen – “Bigger Picture” [www.biggerpicture.dk](http://www.biggerpicture.dk)
- Younger people in eastern Europe are attracted to graphic illustration as a means to communicate separate from older generations
- How can we get case studies from around the world?
- Shamans live on the edge, like OD consultants
- Importance of storytelling
- Usefulness of social construction, social discourse, system theory, etc.
- **Own your own culture**
- **Deal with your own values – can be powerful but can be judgmental**
- Is it possible to initiate processes in multicultural contexts by starting with a means to access shared understanding?
- Western imperialism imposes tools and approaches
- African women operate in a system of power that may not be obvious to outsiders
- **Take time to understand the dynamics on the ground**
- **New generation – millennials – have grown up in global world**
- **In OD you are the tool**
- **What do we represent to our client in terms of our culture/history?**
- Interpreters are fantastic guides
- Limits of intellectual understanding in cross-cultural OD
- Suggested book Erin Meyer “The Culture Map”
- **Hold the preparation lightly when working across cultures**
- **To prepare the mind, open the heart**
- **Culture is a multiplier**
- **Prepare, do all your homework, then yield – get out of the way**
- **Be prepared to be surprised**
- **Trust the process of myself as the tool**
- **Maintain curiosity – as soon as people assume, curiosity is lost**
- **In what way might we redefine our role?**
- **We need three pillars: Inquiry, use of self, homework (but not pre-conception)**

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**Theme:** Cultural transformation

**Convener:** Libby Rush

**Participants:** Elena Feliz, Terri Werner

- Diversity in Canada is about disability, indigenous people/first peoples, etc.; not so much a focus on People of Color (POC)
- 650 people in organization – diverse, way you think, generational; melting pot; not POC, some first nations
- Re-evaluating values; transforming the way we do business
- Need to be more nimble (talk to people, things to talk to people, about things to pay attention to – what is sacred/non-negotiable)
- Isn't it all about vision, mission/values, goals/objectives, roles/responsibilities, documented processes, leadership behavior
- With respect to change instead of “ready, set, fire” approach some organizations just “fire, ready, aim”
- How do we respectfully handle downsizing
- Speak for the other stakeholders – on their behalf – what do they want, what are they afraid of, make lists; different way to have people hear each other – 2 half days
- Have cultural islands vs. large scale culture change
- Metaphor of cultural transformation – cocoon/butterfly
- Use Barrett Value Survey tool – 3 questions: (1) What do you see as 10 top personal values? (2) What do you see as top 10 current organization values? (3) What would you like to see as top 10 values going forward?
- Do you need a “burning platform” to change culture?
- Consider having the group identify their own top values, then they create descriptions of actual behavior at each end of the scale. They then rate themselves where they think the team currently is on the 10-point scale. ('x' under the scale; creates a graph) Once the graphs are up on the wall, can facilitate discussion. For example:
  - Where are we clustered high? What are we doing that's working?
  - Where are we clustered low? What would it take to move higher?
  - Where are our opinions widely distributed?
  - Where are there some outliers, different than the majority of the group? Why are they seeing things that way?
- Not fans of 'confidential' questionnaires; need to encourage them speaking to each other and building trust. Say the data will be 'anonymous' but not 'confidential.' It will be summarized so not attributed

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to individuals, and, the goal is for them to discuss the issues themselves at the feedback meeting.

- What is the future? No performance reviews?
- Don't throw the baby out with the bath water
- One organization rates not just what you do but how you do it..some do "what's working", "not working" – don't do "not working" anymore
- Focus on present/future – What are we doing that's working? What do we want? What could we do more of, better or differently to create what we want? (*Enlightened Leadership* by Ed Oakley and Doug Krug)
- Brain science – limbic system
- Great book about personal change based on science (neuroscience, epigenetics, quantum physics) and re-programming the subconscious: *Breaking the Habit of Being Yourself* – by Dr. Joe Dispenza.
- Trying to create a Culture of Inclusion in ODN – not as inclusive as we think we are; need fresh blood? Let's just not do this – maybe you are there already?
- American culture is getting more and more diverse – more global
- Reviewed ODN Culture of Inclusion one-page flyer – like the Loden model for change
- How do we make this real?

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**Theme:** Funding OD in the nonprofit sector

**Convener:** Lianna Levine Reisner

**Participants:** James Shillaber, Michael Maine, Emily Ackley, Marian Lee, Rebecca Lehner

#### **Discussion/Recommendations:**

##### *Challenges of bringing OD to nonprofits*

- Nonprofit leaders are not necessarily in-the-know about what they need for organizational health. Eligibility/readiness requirements for structured engagements are a barrier for entry.
- Year-to-year funding restricts long-term planning and investment; the preference of institutional funders to give restricted project funding vs. general funds further limits nonprofits' ability to invest in OD
- We need to connect the OD value proposition to nonprofit health and impact metrics, just as it is connected in the corporate sector.

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- Nonprofit resource providers often provide one-off training that makes little impact because implementation is not supported. The conversation needs to be changed around how to create impact and change among nonprofits through an OD package of supports.
- Funders and resource providers also often invest in many white papers and reports that have limited impact because they don't necessarily lead to implementation/change.
- There was an assessment that Jewish community brings in well-known names from the national scene to do "OD light" with nonprofits through speaking engagements or trainings, when they could be better served by full OD practitioners working in their home communities who can have a longer-term relationship with those organizations. (Do other segments of the nonprofit community do this?)
- More nonprofits need "growth stage" supports as they move past the start-up phase; both funding and OD services are important at this stage.
- *Value of OD to nonprofits (just some ideas we discussed)*
  - OD tools and practices are particularly valuable for board development, helping board members become engaged around all aspects of the organization.
  - OD can help nonprofits focus their impact so that they can get past survival mode.
  - OD practitioners can support stakeholder mapping and engagement to keep nonprofit work relevant and on the pulse.
- *An emerging vision of OD in the nonprofit sector*
  - We want to see a future in which nonprofits don't have to choose between buying office supplies and buying OD services
  - OD as a package of support: We discussed packaging OD for different points in the nonprofit lifecycle -- start-ups / growth phase / "re-energizing" / navigating away from crisis / even dissolution -- in which the supports offered match the needs.
  - The OD package would include a set of measures for what constitutes a "healthy" nonprofit across multiple dimensions (e.g. board composition, financial, structure, community involvement, etc.) to help nonprofits determine what their growth and development should include.
  - Nonprofit boards need OD champions. When generating ideas for board recruits, an OD practitioner should be essential alongside a

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lawyer, accountant, and wealthy supporters. Similarly, no one questions when a nonprofit needs legal support or an IT system: how can OD become normalized?

- *Ideas for creating access to OD*
  - Create an OD mentoring structure for (new) nonprofits to help leaders identify and address real issues rather than surface needs. Just like when people retain the services of a lawyer to start a nonprofit, this could be another "given." Someone at the beginning would hold your hand to provide support and coaching, and they could be funded by a match grant (offered through government?) or through incubation (public and privately funded).
  - Example of NYC government's economic development department doling out huge amounts of money to bring corporations to the city, including for training. How can government be convinced that nonprofits are economic engines that warrant investment, similar to what is provided to for-profits?
  - More foundations, including community foundations, need internal OD programs to meet both funders' and grantee needs. But to reduce conflicts of interest, independent external consultants could be co-funded by multiple foundations to serve their collective grantees. (This is already done in some private foundations, but not all, and not comprehensively.)
  - Figure out how to align with Grantmakers for Effective Organizations (GEO), or with intermediaries serving multiple nonprofits to bring OD out as a service
  - Clarify what OD is -- what we really do -- to sell it to the sector, not just to large nonprofits that look like corporations. (When OD exists internally in nonprofits, it's usually within the HR department.)
  - Create an ODN caucus or affinity group for those working in the nonprofit sector. One of its functions could be to vet OD support for nonprofits, paid or pro bono.
  - Partner with Taproot Foundation to put OD into their mix of skills. Learn from the Taproot model to determine if this is one to replicate: structured/vetted engagements. American Planning Association also structures engagements this way: project-focused, matching needs with practitioners, detailed eligibility requirements. Other models discussed were Bridgespan, Community Wealth Ventures, and Social Venture Partners.

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- Provide free flash/speed consulting as a way to get nonprofit leaders in the door and identify real issues, as a stepping stone to deeper engagement (could ODN also do this?)
- Overcoming "how can I get this for free?": even with a sliding scale for nonprofits, it's important to show what the full cost of the service is to help leaders value it -- transparent conversations about cost are essential

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**Theme:** How to organize more like human beings

**Convener:** Henk Hogeweg

**Participants:** ?

### **What organizational structure does to people**

- Puts ownership with just a few people
- Shared leadership (a system quality) comes with minimal structure
- More organizational structure, less human energy
- Organizational structure doesn't help the engagement of people much
- Size matters: teams should not exceed 8 people
- Most of our lives organizes itself

**It's all about how people organize themselves, and not about organizations. Use the energy of what organizes itself. Forget all the rest.**

### **What people need**

- The big picture: what's the purpose of what we are doing here?
- Access to all information and necessary resources to get the job done
- Authority to do what is necessary
- People need to be seen and heard
- People want to focus on the outcomes, not on other people or themselves
- People want to be in control of their own planning etc. They don't organize themselves necessarily in an 'MBA-way.' They rather organize themselves in a way that is meaningful to themselves.

### **What we can do**

- For shared ownership: "It's your idea. What do you need to make it happen?"
- Learn from successes and mistakes: REFLECT
- Live the values, don't preach them
- Recognize 'the other,' see him/her

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- Provide all necessary information to make the right decision to everybody
- People train each other in allround craftsmanship
- Everybody participates and contributes. Nobody can just sit back and evaluate, criticize or judge
- Organize outside (reality) – in: what needs to be organized?
- Make sure people can see the end result

### **Something to chew on:**

If we know how to do it, why don't we just do it?

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At the end of the day, Harrison Owen asked participants for their reflections and experience.

Contact Elena Feliz at [feliz\\_elena@yahoo.com](mailto:feliz_elena@yahoo.com) or call her at 718-335-8161 or 917-519-5428 if you have any questions and/or comments.