

The Open Space Process

**Howard Hughes Medical Institute
2005 Precollege Program Directors' Meeting
October 24–26, 2005**

On the final day of the 2005 precollege program directors' meeting, the Howard Hughes Medical Institute tried out a new discussion format. Called Open Space (OS), it allowed the approximately 60 meeting participants to develop their own agenda for addressing an important thematic question.

The Question

Dr. Peter J. Bruns, HHMI's vice president for grants and special programs, asked the program directors to answer the following question:

What are the opportunities for using the resources of HHMI's Janelia Farm Research Campus for the support of enhanced science education in the United States?

He explained that the responses needed to be congruent with, and complement, Janelia Farm's purpose—to serve as an international interdisciplinary research center promoting team efforts that combine biology and biotechnology to explore key scientific issues.

To help inform the discussion, Bruns provided an overview of Janelia Farm, scheduled to open in 2006:

- Scientists will have flexible office and laboratory space that can be reconfigured to promote teamwork on various projects.
- Accommodations will be available for long and short visits.
- The campus is being constructed using the latest ecological advances to save and incorporate natural resources.
- When completed, the site will include ample green space and blend in with the surrounding environment.

The OS Process

Harrison Owen, president of H.H. Owen and Company, briefed the participants on the OS process and helped get them started. With all the participants seated in a circle in the Great Hall of the HHMI Conference Center, Owen explained that the purpose of the session was for them “to seize the moment to begin a conversation that combines imagination and practicality and that leads to unique ideas” to answer the question posed by Bruns.

The OS process is simple, self-directed, and highly focused, Owen noted. Participants would create the agendas and schedules for four sessions, each of which would be composed of several simultaneous small-group meetings. After all the sessions were completed, the entire group would gather again in the Great Hall for a follow-up discussion.

As the first step in creating the sessions, Owen invited participants to present ideas for which they had a passion and were willing to take responsibility. These individuals would convene small groups to discuss the ideas and then write summaries of the key points. The reports would be shared with the larger group online after the meeting. In addition, the reports would include a list of all group members so that they could continue their discussions, formally and informally, over time.

More than 20 individuals stepped into the center of the circle and announced their names and ideas. Each selected a time and place for the discussion of his or her idea and posted this information on the wall so participants could decide which sessions to attend. Owen noted that conveners were free to combine topics. He cautioned, however, that ideas might only seem similar and that smaller groups were conducive to greater participation.

Four Principles and One Law

Before disbanding the large group, Owen explained the four principles and one law that govern OS sessions.

The Principles

1. *Those who come are the right people.* They cared to come. If no one comes to discuss a topic, the leader should go to another group or work on the issue alone.
2. *Whatever happens is the only thing that could happen.* Group participants should focus on what is occurring.
3. *Whenever it starts is the right time.* Creativity cannot be timed.
4. *When it's over, it's over.* If the conclusions are not usable, group participants should move on to something else.

The Law of Two Feet

Group participants must be learning or contributing or they must use their two feet to leave the discussion and join another one. This law makes it clear that each individual is responsible for his or her contribution and learning. Once the Law of Two Feet is in effect, “bumblebees” and “butterflies” begin to circulate. The bumblebees are people who buzz from group to group, cross-pollinating ideas. Butterflies, in contrast, are people who do not participate in the formal sessions but who stimulate informal discussions.

Criteria for a Successful OS Session

Owen observed that OS always works if

- People care about the issue.
- The issue is complex.
- There is a sense of urgency about making the decision.
- People represent diverse points of view with actual or potential conflicts.

He added that the Janelia Farm question met all of these conditions.

Owen suggested five criteria for judging the success of an OS program, although he added that they are best applied to more typical OS sessions, which run for one or two days.

1. *High learning.* The process changes how participants think, enabling them to create new ideas and abstract linkages that would not occur in other settings and that may lead to the shifting of key paradigms in their field.
2. *High play.* A convivial, open atmosphere is developed where participants feel free to share “silly” ideas, question dogma, and entertain and debate conflicting notions.
3. *Appropriate structure and control.* The original, large group develops a complex structure (i.e., the agenda and schedule) in a short time. The structure of the smaller groups devolves from this and includes the time and organization needed to develop worthwhile products.
4. *Formation of a genuine community.* Participants develop deeper bonds with their peers and expand their networks by talking with people, some of whom they may not have known previously, who share their passion for specific ideas.
5. *Tangible output.* Participants generate worthwhile ideas (as measured by group consensus), express them clearly in reports, and create plans to move these ideas forward.

The Evolution of OS

Owen was inspired to create the OS process 20 years ago when he realized that people attending meetings often benefited more from the coffee breaks than from the planned sessions. The breaks were highly valued because participants could informally exchange ideas about topics that were personally engaging. Applying this insight, he developed the rudimentary OS process, which he then spent five years refining and field-testing. To date, OS sessions have been convened about 60,000 times in various locations around the world.

OS is an ongoing natural experiment in the study of the self-organization of human systems, Owen explained. He traced the antecedents of the process to the free flow and valuation of ideas that occurred in tribal meetings and village marketplaces. At present, he is developing an in-depth theoretical framework for the OS process.