

Using Open Space Technology (OST) in Building Partnerships and Coalitions and in Generating Ideas for the Creation of a Planning Tool

/ by Tova Averbuch

THE CHALLENGE

The client was looking for a structured way to integrate social and community aspects into the process of physical planning and building in Israel.

THE CONTEXT

Israel is a very densely populated country, with little undeveloped land, characterized by a rapidly growing and diverse population. This combination of factors generates tremendous pressures to build and develop in immediate response to emerging needs, *ad hoc*, with no master plan and no time or attention for systematic or integrated broad-scope views of social and community considerations. In 1999 the Knesset (Israel's Parliament) approved a "master plan for building and development." Around the same time there was a stirring of public awareness and increasing civic involvement in regard to these issues and a growing demand for community participation in decision-making processes in areas that directly affect people's lives. The initiative described in this chapter was one of the first and most revolutionary in terms of public participation and real democracy, the swallows foretelling the spring.

FROM INITIATIVE TO STEERING COMMITTEE

The initiative for integrating social and community aspects into physical planning processes came from *Government* in the person of Dalia Lev-Sadeh, then Director of the Community Work Department in the Ministry of Labor and Welfare. She was joined by members of an *NGO* (Non-Government Organization) with expertise in creating coalitions between government and civic groups in Israel; a *public agency* that specializes in community work and participatory democracy; and by *academia*, in the form of a research center for urban and regional studies based at the Technion in Haifa. This partnership served as a sustainable base for the initiative. The initiating individuals (and a few others) created a spirit of engagement in the project and developed strong personal bonds. The four organizations together enabled a long-term commitment, generated power and resources, and created the legitimacy and stature that were needed to invite others to join a nationwide, multidisciplinary initiative and project. As a formal step the partners created a steering committee, making sure that it was made up of diverse stakeholders and, in keeping with that spirit, continually inviting more and different partners to join in.

THE STEERING COMMITTEE CHOOSES ITS PATH

Initiating members of the steering committee had a compelling desire to make a difference in the field of physical planning, but at the start had no clear vision of how to actually go about doing it. As all the members were committed to the idea of a partnership, they decided that two key features would characterize their approach: (1) the steering

committee would be composed of all the main stakeholders, and (2) the resulting document would be written collectively.

Another important choice made by the steering committee was to focus on one project: to create a “social and community impact assessment” document that would be a practical tool for physical planners. The choice to focus on creating a tool rather than a specific content was a key factor. Toolmaking enables people holding opposing positions to join together in the process of exploring and crafting new domains and often keeps them from fighting over details.

As the committee looked for a suitable methodology, Shai Ben-Yossef, one of the initiators, called and asked me to introduce Open Space Technology as a possible approach. By that time I was already an experienced Organizational Development (OD) consultant and an Open Space (OS) specialist, but I had never before used Open Space to work with a multiparty, cross-organizational project that would be open for public participation.

At the first meeting of the steering committee, as I listened carefully to the dreams of the people that were there and to the challenges they were facing, I realized that OS technology would definitely be their best choice for the preparatory and launching stage. As most of them were not familiar with OS, I gave a short presentation, but knowing that space opening is all about the making and enabling of choices, I suggested that we have a mini-OS (3-hour) meeting.

From the beginning the preconditions for using OS were clearly in evidence: real concern, complexity, conflicting and opposing forces, rich diversity, and urgency (the implementation time was yesterday), yet the need to make a conscious choice was there as well. The mini-OS meeting, which was dedicated to clarifying the various roles and tasks of the committee as a preparatory team for a large group gathering, served to give the committee members a clear understanding of what opening space for real and vital issues

entails. This shared experience enabled the committee to make an informed and conscious choice as to whether and when to use OS in the process.

The steering committee's goals at that time were: to generate legitimacy and practical ideas for the formulation of a guiding tool for planners, to build momentum and energy around this issue, and, at the same time, to experiment with the large group gathering in OS as an example of a participatory method for large diverse groups in Israel.

The nature of OS is a perfect match for these goals in that the four principles and the law of two feet create a space conducive to the inclusion of differing and diverse opinions. The equality manifested by people sitting side by side in a large circle and the transparency of a real-time agenda and real-time proceedings that are open to everyone invite trust and personal responsibility. These in turn unleash blocked and locked potential energies, and playful participation (be prepared to be surprised) gives way to new and practical ideas. All of these elements together generate more than enough energy to fuel a launching event, a lift-off.

PRE-WORK WITH AND BY THE STEERING COMMITTEE

For the preparatory work the committee met every four to six weeks, for about five hours at a time, over a period of six months. I attended about half of these in my role as an OS expert. The meetings were full of life and good humor, yet the work was done very seriously. The preparatory steps dealt with three key areas:

- A careful and intentional process of invitation and marketing efforts to major players in the field, to people who care about physical planning in Israel, and to the community at large.

- Site requirements and logistical ongoing preparations suitable for OS.
- Trying to “be the change we want to bring,” we let OS principles govern our decision-making process. Decisions about invitations, fees, registration procedures, and so forth, were made in the spirit of opening wider and wider space for new emergence.

As a manifestation of OS principles the client group grew from four to eleven sponsoring organizations!, embracing more and more diversity and consciously appreciating and finding joy in conversing with real opposition.

THE LAUNCH

Interest continued to grow, and a week before the planned convention we had an enrollment of 180 people. It was a bittersweet feeling, making us think: “Wait, we don’t have room for that many people.” The steering committee took a decision reflecting their trust and commitment to opening space: “We bar no one; whoever really wants to be at the gathering will be invited in; we’ll manage somehow.”

In February 2002, while the almond trees were still in full bloom over the mountains of Jerusalem, the stage was set for an OS launching event. Eleven sponsoring entities (government ministries, NGOs, community agencies, activist groups, and a variety of local and national public and professional organizations) took part. A two-day OS gathering convened in a beautiful and peaceful setting at the Zippori Center in the Jerusalem Forest. The theme was *“Integrating Social and Community Aspects into Physical Planning: What Should We Do to Make a Difference?”*

On the day before the convention, inquiries were still coming in. By the end of the day there were 210 people registered. In Israel that could mean that any number from 180 to

250 people would show up. What should we do and how shall we manage? How do we prepare for the possibility of bounty? So we took a deep breath and made threefold ‘decision’: that this was very good news, that there would be a future, and that the future would be good!...the space left between the chairs after we squeezed three concentric circles into an oval room with a low ceiling was shaped more like a long hot dog than like a basketball court.

Most of that first evening was spent connecting and creating a pleasant, welcoming ambience in every way we could think of, from installing a ramp for the one wheelchair-bound person who registered to introducing and briefing the people from cleaning, maintenance, the hotel, and the photographers, who all became peers in the same production. The feeling was similar to what one might experience at the opening of a carnival or while anticipating a large family gathering.

On the first day people began flocking to the Jerusalem Forest at around 8:30 A.M. Within an hour the parking lot was full, and the joy and excitement were overflowing... Around 10:00 nearly all the seats were taken by what proved to be a rich diversity of people, including “major league players” in the planning field. More than 200 individuals who cared about the physical planning process in Israel had turned up: urban planners, architects, social workers, community workers, strategic unit managers of municipalities and communities, and neighborhood activists, representatives of three government ministries (Labor and Welfare, Interior, and Environment), four government departments, and many kinds of NGOs. It was a very experienced and diversified crowd: men and women varying in age, place of residence, profession, education, life experience, and perspective; Jews and Arabs; religious and secular. In all likelihood, most of the people attending had never shared a conversation before and had never conversed as equals on common ground.

Dalia Lev-Shadeh, the chairwoman of the steering committee, opened the event with a warm welcome, presented some background and history, and talked about the committee's intentions regarding future development and expansion of the initiative. She finished with "Be prepared to be surprised," and passed the microphone to me. I also welcomed people to the OS, acknowledging the richness of the group, and drew attention to the 2,000 years of planning experience that was present in that room for a two-day interaction, a truly revolutionary potential.

At the opening of the OS proper, the response was lively. About ten people actually jumped into the center of the circle and hurriedly grabbed paper and a marker to create their themes. Within three minutes there was a line of twenty people waiting for the microphone to announce their issue of interest and fifteen minutes after that the community bulletin-board listed some fifty issues, spread over four sessions and seventeen different break-out spaces. There was a bustling, vital atmosphere in the huge 'marketplace', and people went off to work. Different issues were discussed in depth: for example, public participation in planning processes; trains and changes in commuting habits; the Israeli seashore as a public asset; what to include in a social and community impact assessment guiding document for physical planning; special planning needs for senior citizens, women, and youth and their involvement in decision making; issues unique to Arab society or the rural sector; and planning flaws in burying pollutants in populated areas as causes of mass poisoning.

The groups convened, the main issues and recommendations were documented and printed out: a human system of 200 people in operation, fueled only by the passion and personal responsibility of the individuals participating in it. The design was proper OS except that we added a five-minute "noon news" gathering to allow new issues to be posted on the community bulletin board. Since we only had one day of conversations before integration into action, the "noon news" helped us to go deeper into the issues. Other than that we

maintained the minimal required structure and tried not to interfere with the flow as it intensified.

At around 5 P.M., I noticed that people began to leave at an increasing rate. Some of the participants approached me suggesting, “When it’s over it’s over...,” so I thought perhaps it *was* time to close, but just as I was about to do so I decided to get my own personal impression first. Taking a short trip around the premises, I was astounded to find four large groups (of about twenty people each) and two small ones (of about seven people) deeply involved in serious discussions and some fifteen people walking around and talking or writing up the proceedings for concluded meetings. After I had walked around, I was sure that it was not yet over, so we continued as planned. About 100 people attended the “evening news” plenary, totally committed, satisfied, hungry, and tired. We collected the main experiences of the day from all those who wished to speak, informed the group about administrative and logistical issues, and invited everyone to come to the steering committee planning meeting later that evening. The first-day plenary was over. *Bon appétit* and good night.

After dinner members of the steering committee joined by seven other participants set out to fine-tune the planning for the next day. We read all the material created by the various groups, developed subject-matter clusters, and made our choices as to how the day would flow. After midnight our work was done for the day, but the sounds of Zippori Center staff producing copies of the proceedings continued until dawn.

The second day was dedicated to translating the energy and the rich dialogue of the preceding day into an operative plan. In the center of the room, covered with a flowered cloth, lay 120 books that were produced during the night. Following an unveiling ceremony, everybody started reading proofs, addenda, and errata, animated and lively activity. Thirty additional copies were made, as the number of second-day participants was larger than

expected. Once the reading was done, we moved onto a presentation of the subject clustering done by the volunteers of the previous night's meeting as an offering to the collective. At the plenary, during the next two hours, all the participants reviewed the work, validating and improving it in one big circle. We were 150 people, keeping track together: "Does subject X belong to subject cluster A or to cluster B?" This phase is not an easy one because implementation work requires a greater degree of precision than conversation. Sensing that *this* is the point at which people may give up on the tedious work of co-creating and of keeping the space open, I turned to the group and asked each and every participant in that plenary to please join me in trying to create a minimal emerging order to help us wade through. By the time we were done each subject cluster had become an implementation team composed of people who specifically self-selected themselves for the role of leading/championing the team or participating in it.

The "closing circle" allowed every team leader to briefly describe the steps to follow and invited everyone who cared to to share his or her insights, conclusions, and gratitude for the opportunity to be part of this process.

WHAT HAPPENED LATER?: A CHRONOLOGICAL REVIEW OF THREE YEARS OF PROCESS

February–March 2002

A comprehensive literature review of the world's best practices for integrating social and community aspects into physical planning processes was conducted parallel to the OST process. This survey was used as input in the tool creation process and provided access to a systematic and worldwide body of knowledge as a complement to the local knowledge generated by people who shared (at the launching OS event) personal experience, passion, and responsibility in the field, both paving the way for integration.

21 February 2002. An initial book of proceedings was produced on site, which included all of the conversations that took place during the OS gathering and contact information for all of the participants.

March 2002. A second book of proceedings was issued, which included all the implementation team summaries and the entire first book after incorporation of the addenda and errata. It was sent to every participant, made available on the web, and served as the base for the next product: “The Organizing Document” (see later).

April 2002: Six Weeks after Launch. The steering committee held a meeting to summarize and reflect on the OS process and chart its future course. At this get together people indicated that they felt that their goals and expectations had been met very successfully, and it was clear that there was great joy and satisfaction with the event. Mali Reif, one of the four initiators, expressed her satisfaction: “We were very pleased with the number and rich variety of people that showed up. This process drew the attention of people in the field, marked their consciousness...and, most important, it gave us a lot of issues and ideas for the creation of ‘a social and community impact assessment’ tool.” The committee decided to focus on document creation and to turn to others again, using participatory methods, for a discussion of the drafts after they were written.

LOOKING BACK THREE YEARS LATER

As my contract was only for the preparatory work and the OS launching event, I was in no formal relationship with the project after April 2002. When I was asked to share my

experience with large group intervention for this chapter, I went back to the people involved to find out what had happened during these last three years and what is happening now. To gain perspective I interviewed thirteen people (in April and May 2005): five of the steering committee members (all of the initiating organization included) and eight participants. Six out of these eight participants had formed conversation groups during the two-day OS in Zippori and half of them were leading implementation groups on the second day. Half of the interviews were conducted over the phone and half were face to face.

February 2002–Onward: The Ripple Effect

The year 2002 marked the beginning of pervasive use of OS in Israel, and a strong ripple effect was manifested in the use of OST as public participation practice in the municipal sector in the country. The Open Space Gathering at the Zippori Center marked a turning point: 2002 saw seven OST gatherings dedicated to creating partnerships and involving the public in different municipal and regional strategic issues; the number of events is still growing and, by and large, each event seems to be larger in scope, diversity, and number of participants than the one before.

A self-organizing mechanism is strongly manifested: at least twelve of the OST events that took place in different regions and communities in Israel later in 2002 and in subsequent years were joint projects of the Zippori OST launching-event participants! These individuals joined together, two to four at a time, supporting and empowering one another in co-production, advice, and, at times, facilitating opening space for the public with OST gatherings on behalf of one another. The occurrence of so many OS gatherings in the municipal planning field in such a short period of time is quite a remarkable phenomenon, as the participatory methods used in Israel until early 2002 were highly structured and none

employed large gatherings that invited the participating public to actually *partner in leading* with the organizers and in taking the co-created desired change together into the future.

How was that possible? Apparently there was a new awareness and the perceived need to find avenues for genuine public involvement was a growing trend in the country when the 2002 gathering created a new paradigm for participation. It was clear, for the first time in Israel, that vast public real-time participation is a real option and can genuinely be implemented and used. Hanna Heiman-Pessach, a participant who became a sponsor and facilitator of future OS gatherings, expressed it very poignantly: “The OS in Zippori made it clear that it is possible. This was the final thing that I needed, a feasibility study, a full proof of quality that had gained my trust and confidence. All that was left was to run and do it”... this motion didn't stop and is still present.

May 2005—The Toolmaking Is Complete

The main challenge has been met: “The Social and Community Impact Assessment Document” is ready and open to public scrutiny. Committee members are creating opportunities for professional feedback, public hearings, and mail comments regarding the document, and are revising and improving it as preparation for implementation by planners, which is the next step.

Along with the primary goal of creating a tool, two related achievements, one on the organizational level and the other on the personal level, are still in place: On the organizational level the coalitions and partnerships among organizations and individuals are strong and active. Committee members meet and work together even though quite a few of the initiators have moved to different organizations and different positions. On the personal

level, there is a vivid memory of an empowering experience. The people I interviewed responded willingly and had spontaneous and lively memories.

All three elements (the document, the coalition, and the personal experience) are vital for the coming stage: to generate the power and interest to implement the tool created and make it an integral part of the physical planning practice countrywide. At that point they may want to go back to participatory methods.

WHAT DID I LEARN?

Looking back is always a tricky and full of surprises process. I am thankful for this journey and the treasures discovered.

1. Assessing the large group event three years later. While looking back on this work from a three-year perspective, I have a simple yet strong realization about the nature of large group (LG) gathering assessment: A large group event is and always will be an unfolding mystery. Yes, the event is over, we are satisfied (or not), and we finish the work and part, yet we can never know or foretell the actual contribution and effect of this single event. This may be true about everything in life but in opening space for a large multi-organization group it is, I believe, a dramatic truth: the ‘large group’ aspect serves as a potent amplifier and the ‘self-organizing’ aspect keeps the ripples going long after the event itself is over.

It is both disturbing and rewarding to realize that if not for my work on this chapter I am not sure when or if I would have noticed the ripple effect that the February 2002 OS experience had on opening the Israeli municipal sphere to the use of Open Space as a methodology that enables and promotes shared leadership and co-creation among people and sectors in our society.

2. Very different people just meet to converse as equals and self-organize. While still in Zippori in February 2002, I was touched by how precious it is to have diverse, opposing,

very different people meet to converse as equals. So simple and so powerfully revolutionary, as Shai Ben-Yossef illustrated so beautifully three years later: “The most revolutionary moment for me in Zippori was watching a woman, whom I had never seen before, stand up in the plenary and speak her clear voice, everybody listening carefully to her wisdom. When she was finished I asked someone next to me: ‘Tell me, who is this lady?’ The answer was: ‘She is the secretary of the Carmel market [a fresh food open air market] in Tel Aviv.’”

By inviting everyone and anyone who cares to the launch gathering, two simple but very uncommon things took place: The first was having everyone in the room (diversity) and the second was trusting that they would know what to do together (self-organization). Usually it is an ‘architects convention’, or ‘social workers convention’, or ‘planners but not public’ convention, and so on. It was a breakthrough in the Israel of 2002 to have them all in the same room talking eye to eye, heart to heart, genuine conversations with no unnecessary jargon. Participants took time to self-organize rather than the gathering being overly structured and managed with an agenda and a timetable imposed by the organizers. In a rich, diversified, and transparent milieu it is easy to for anyone who cares to initiate and to listen, to find allies, to form partnerships, and to join others to make headway together. I must admit that this simple idea of different people who have never even seen one another meeting to converse as people is a powerful revolutionary tool.

3. Pre-work is the real work of space opening. This was a profound realization while working with the steering committee. We were using every minute of our working time together as an opportunity to experiment and explore living and doing in open space. Letting the four principles and the law of two feet govern and be reflected in everything we were trying to do generated a space for playful inquiry and experimentation.

Using OS principles again and again, inviting and including partners with diverse and opposing opinions in a genuine and sustainable way, created a real open space for the steering

committee and served to open space for all the rest to join in the launch event and later. Regardless of whether or not an OS expert was around, they had enough language and experience to find their way and to keep the space open for emergence.

While reflecting on the challenges of doing the pre-work, the most challenging aspect I recall was the fact that there were different people showing up at every committee meeting! Under a regular paradigm of what is considered a “productive way of functioning” that was preposterous, but under the OS paradigm and its set of governing principles, whoever came and whenever they showed up was perfectly OK. That was tough at times, both for me and for some of the committee members, but we were all joking and wading through it together. Eventually I came to think of the steering committee as akin to a riverbed: same river, different waters/members every month, streaming along in a self-organizing process supported minimally by the ground/project management. This *modus operandi* seems to be the best preparatory training for “trusting the process” of Open Space Technology before falling into the real “big waters” of a multi-organizational OS gathering open to public participation. In an odd and interesting way this “riverbed” concept also became a marketing effort: more people bought into it talked about it, felt part of it, and were witnesses to our ongoing and genuine attempt to practice what we preach... .

One last note about OST: in Zippori I recognized the strength of OST as a way of moving people and organizations from care to dare, from concern to action, from “community of care” (that shares passionate concern and interest over the same issue) to “community of practice” (that self-organizes to materialize a joint initiative).

Now is time to share a harvest of practical wisdom about creating partnerships and coalitions, which I reaped along the way while doing, reflecting, and writing, summarized here in an eight-step model:

Step 1: Make at least one real partner. This creates an energy field, a potential space for the emergence of new creation.

Step 2: Make a coalition of organizations and individuals, not a coalition of individuals only. Organizations bring qualities such as continuity, steady energy (time and money allocation), clarity of interest, balance, and power in representation. This is very important for long-term processes, where people change positions and too much energy is needed during the process to ask for it from individuals. *Individuals* bring the passion, spirit, and unique abilities and attributes.

Step 3: A good start for a wide coalition is a diverse partnership of government, NGO, public agency, and academia. This base creates a balanced whole that is “top down” (government) and “bottom up” (public agency), anchored by professional orientation (NGO) and a spirit of inquiry (academics) and thus compatible with and able to accommodate the inclusion of many more.

Step 4: Define a wide enough issue so that everyone can step in and belong if they so choose. The issue should be wide enough to really invite and embrace a rich variety of opposing and conflicting partners who share passion and interest in the same subject.

Step 5: Find and engage in a real, specific, and concrete initiative to pursue together. This might, preferably, be a technology or tool creation, as people holding opposing opinions tend to be more attached to content and inclined to fight over it, yet join together in exploration of tools and processes.

Step 6: Open a steady space for the initiative by resource allocation. A minimal yet vital amount of time and money dedicated to the building and maintaining of

the infrastructure needed to support the self-organizing process. This is even truer in high-conflict situations.

Step 7: Create a steering committee/preparatory team (as a microcosm) and work with them in open space. Practice makes perfect. Allow at least six weeks for this preparatory work, preferably several months.

Step 8: Prepare for an energy blast. People who share passions seem to generate an abundance of energy when put together in the same time and space voluntarily self-organizing. If you want to make use of these energies, prepare for “the day after” the OS event by having threads, webs, and infrastructures to assist in keeping it up and emerging.

As I conclude this chapter I am still asking myself the question, *what is “good management” in self-organizing of multi-systems?* Is it focusing on your initial goal, trusting that people and energy will take care of themselves? Is it preparing parallel avenues for energy to flow, taking into consideration the possibility of energetic overflow? Is it both? Does it really matter?. One thing I know for sure: *it takes careful preparation, practice, and even some planning to let go of control.*

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