

On Becoming an Accidental Facilitator

Joaquim Baptista shares his experience as an accidental facilitator.

Sometimes, your job is to let people talk to each other, and facilitation is the tool to use.

Witnessing Open Space

I was attending WikiSym 2008 in Porto, a conference about wikis and collaboration.

The programme started with registration and coffee.

Suddenly, I heard this long, slowly fading bell, sounding every ten seconds or so.

I traced the sound to a small lady who swiftly moved through the crowd, drawing people behind her.

When the bell sounds stopped, the lady had assembled most of the crowd into a large circle.

She announced herself as a facilitator, motivating people to post topics for discussion on a wall, and people started to contribute.

I discovered that the developer of TWiki, the software I was using at Altitude Software, was also at the conference.

And that's how I found myself spending the afternoon in the garden outside the conference venue, discussing TWiki with 17 others, in a surprising and unplanned parallel event.

I left the conference amazed with this almost magical ability facilitators have to help people find each other and collaborate.

However, these were not your typical "boring" attendees.

For example, never again did I see a presentation delivered as a song.

The need appears

Two years later, my wife was complaining on a Friday night.

As a board member of the Parents' Association of the local school, she had been trying for months to organize an event for parents, facing the opposition of the school.

She was desperate and ready to give up.

It dawned on me that the self-organizing magic of Open Space would alleviate the need for planning.

So I retold my experience at the conference.

Over the weekend, I ordered the book from Harrison Owen that introduced the method, and I started to read what I could find on the Internet.

Next Monday, the direction of the Parents' Association approved the event, which was scheduled to take place in the sports hall of a local club.

All I had to do now was to act like one of those magical facilitators.

Learning Open Space Technology

Open Space Technology works when a large enough crowd faces a complex problem with some urgency.

You also need sponsorship: people must believe that whatever they say or decide will have some influence.

The initial invitation must be precise, short, and inspiring.

These conditions naturally lead to the first principle of Open

Space technology:

"Whoever comes is the right people".

In the opening ceremony, the facilitator must motivate the attendees to express their views and to engage with others.

Harrison Owen describes a precise choreography of emotions, and guides the prospective facilitator almost word-by word.

The outcome is a market of topics, where attendees discover shared views and interests, and negotiate which topics will be discussed when and where.

Attendees decide which conversations to attend.

For the whole process to work, participants must follow "the law of two feet".

Each person should feel that they are either learning or contributing.

When someone feels they are doing neither, they should use their two feet to move to another place where they can make a difference.

Those who propose topics should take notes or find someone to take notes.

When sessions end, these notes are posted for everyone to see, thus disseminating knowledge and findings to others.

The closing talking stick ceremony uses some physical token to give a single person permission to speak, while others are required to listen.

This ceremony brings people together and often feels like a celebration.

Afterwards, a final report consolidates the notes from all sessions, for further reference and as a political statement to sponsors.

A full Open Space event takes 2.5 days, with further ceremonies of "evening news" and "morning news".

- During the first day, attendees diverge but improve their understanding of the problem they are facing.
- During the second day, attendees converge on possible approaches and solutions to their problem.
- During the final half-day, leaders emerge to drive the implementation of consensual solutions.

Harrison Owen defines the tasks of the Open Space facilitator as follows:

1. Navigate politics to ensure the conditions exist for the method, and craft the invitation.
2. Carefully prepare the space for the event, picking up the locations for conversations, putting up signs, designing the billboards for the idea market and for session notes, and carefully arranging chairs.
3. Open the space when the event starts, in a critical 15-minute performance.
4. Hold the space while the event continues.
5. Close the event with a talking stick ceremony where attendees reflect on what happened and celebrate.

Harrison Owen's book talked at length about holding the space during the event, explaining how the facilitator should

"do nothing", except perhaps pick up the garbage.

Everything felt very Zen and very nonsense to me, meaning that I approached my first event as facilitator in a state of quiet disbelief.

Open Space for local schools

I facilitated a series of Open Space events for two local schools in 2010 (Mar, May, Dec), then Nov-2011 and Jun-2012.

Attendance was not exactly earth-shattering: the events attracted 20, 11, 12, 41, and 11 people.

However, they were meaningful experiences to attendees that engaged community leaders, as captured in the final reports.

> 20 people talked for 4 hours, all were surprised by the quick passage of time. The conversation was so interesting that some people preferred to stick to the initial conversation instead of talking about their own topics, and some continued the conversation at the bar for another hour. Everyone expressed interest in future meetings. And two girls who didn't know each other (7yo and 9yo) became best friends.

From the final report of Mar-2010.

> 11 people talked for 4 hours, but some extended the conversation for another 2 hours. They were all leaders of the local community (School, APDM, CPCD, ATL). They recognized that they could not have had the same conversations if they had met in a different context. And two children (9 and 14 years old) played for an afternoon.

From the final report of May-2010

As the acting facilitator, the practice provided several insights:

- The idea market finds topics of interest even amongst a small number of people. For example, 20 people came up with 15 topics, and then negotiated 4 topics for discussion.
- The depth and duration of the conversations surprised me. It's like people had just discovered they could talk to each other. Initial conflict became future collaboration.
- The part of "doing nothing" turned out to be accurate. Participants kicked me out of their discussions, but my silent approval of their conversations encouraged them to proceed. The kids brought by parents also sought my approval for their playing activities, while parents relied on me to keep their children safe while they talked.
- As an extreme example of the law of two feet in the 41-person event, I saw the same conversation start three times, with three different groups of people.
- By ensuring the attention of the group, the talking stick ceremony elicited unexpected comments from shy and introverted people. For example, my mentally handicapped son, barely able to speak at the time, felt comfortable enough to stand up and thank 40 people for coming to the event.

The talking stick ceremony became even better when the stick itself became meaningful.

I started with the decorated cardboard core of a roll of kitchen paper but, for the 41-person event, I borrowed my daughter's rag doll.

The rag doll helped speakers, who often interacted or talked to the doll, while gently reminding everyone of the purpose of the event.

It felt utterly symbolic to have a local policeman, soon to become a father, talk about bullying and school safety while holding the rag doll.

Talking stick for Q&A at community events

As the local parents' association started to provide useful paid services to the community, the formal assemblies started to attract more and more parents.

After initial presentations from board members, the open discussion period was often monopolized by the first controversial topic raised.

A few parents would insist on maintaining the controversial conversation until the assembly ran out of time, to the visible despair of other parents who lost the opportunity to raise their own concerns.

For a formal assembly in Nov-2011, it dawned on me that the talking stick ceremony might be a good way to change the dynamic of such meetings.

However, I grouped the parents by the Portuguese school grades:

I asked parents of students in the grades 1–4, 5–6, and 7–9 to sit on the right, middle, and left of the room.

During the Q&A session, we went through the groups of parents in order.

While many parents skipped their chance to talk with "my question was already addressed", there was visible happiness in having the chance to speak up.

Again, there were small kids playing around the school corridors while their parents attended the formal assembly, which was held in school grounds.

Every once in a while, the kids would check on their parents: they would briefly run into the room and observe what was happening, before running away again.

So, why were adults holding a rag doll?

I explained the purpose of the rag doll to the children, and offered to let them speak as well.

They ran away, giggling.

The next time the children came running in to check on their parents, I offered them the doll again.

When the children understood they would be heard, a 10yo young lady stepped forward and addressed the audience, gravely and slowly, to complain about the amount of food being served at the school cafeteria.

Parents in the room were not aware of any issue, including the parents of that young lady.

This prompted an initiative by the association to quantify and address the issue.

In Mar-2012, a small group in the local community organized a successful event on a sensitive topic: love and sex for handicapped people.

The event attracted 60 people, including 30 parents, school teachers, kindergarten teachers, psychologists, and nurses.

The event design grew from my previous experience as facilitator:

- We invited a panel of experts, who were asked to share two examples each. We felt the examples would be more relatable and insightful than any amount of dry theory.
- We capped attendance to 60 people to ensure meaningful interaction during the 2 hours scheduled for questions and answers.

- We grouped attendees according to the age of the handicapped person concerned: puberty, before puberty, and after puberty.
- We asked attendees for written notes.

In summary, we organized a significant event with relatively little preparation, facilitating meaningful interaction among participants, and capturing everything into an 83-page report with transcripts of invited experts, event organizers, invited texts, and 40 pages of notes from participants.

Open Space for professional events

I returned to Porto for AgilePT'2010, a new local conference focused on Agile methodology.

Presumably inspired by WikiSym 2008, the conference included an OpenSpace part.

I watched in disbelief as the Portuguese facilitator, presumably a volunteer apprentice just like me, failed to motivate attendees during the opening ceremony, which resulted in very little participation.

This being a low-priced community-organized conference, I eventually offered to facilitate the Open Space part of AgilePT'2011.

The first day was dedicated to 1-day tutorials.

The opening ceremony took place at 2pm of the second day, and gathered one-third of the conference speakers, staff, and attendees.

13 people proposed 15 meeting topics, and 24 different people showed their interest by casting 58 votes on 12 of the topics.

Seven sessions took place during the afternoon, originating just three reports.

The end of the second day met a tired crowd. A talking stick ceremony drew individual insights, but no follow-up sessions.

The tables, chairs, and bean bags remained busy during the third day, but without any reports.

Still, during the closing talking stick ceremony you could hear a change in the voices of the participants as they cherished their participation in the conference.

People spoke as members of a stronger agile community, and not as isolated lone practitioners.

As facilitator, I found that the venue had isolated OpenSpace and presentations to different parts of the building, hindering interaction.

The time slots dedicated to Open Space further limited interaction.

This reinforced the need for proper sponsorship, and the importance of the venue.

Years later, in Jul-2016, the very successful DevOps meetup in Lisbon organized an Open Space event instead of their regular presentations with four breakout conversations.

Instead of 100–200 people, the event drew only 16 people, who organized themselves around 4 topics and talked for 2h30.

Still, years later I received praise from a participant of the event.

In Jan-2017, Farfetch HR was deeply concerned with establishing the culture of the new office in Lisbon, and addressing any issues.

HR accepted my offer to use Open Space to organize the conversation among the 20 employees in Lisbon, resulting in

14 topics and 11 reports.

During the COVID-19 pandemic (Jun-2020), a virtual meetup about clear communication managed to recreate the group dynamics that normally happen in physical presence meetups:

- 33 people attended the 30m presentation by José Aragão. After the presentation, we challenged participants to apply their new skills.
- 20 people accepted the challenge. We split the participants among five virtual rooms, and asked them to rewrite four sentences.
- After 15 minutes of networking and interaction in small groups, we brought everyone together and compared the rewritten sentences.
- Finally, we allowed each participant to address the group with a question or comment, and everyone did, either to praise the event or to ask clarifying questions.
- The 1h event ended after 1h30, although a few people wished to continue.

In Feb-2025, Millennium BCP held an internal hybrid event. Several internal teams presented how they collaborated to provide a specific technology, while 50 users and managers attended, mostly remotely.

At the end of the day, I facilitated the final Q&A session. I called remote attendees one-by-one, which resulted in the enthusiastic participation of 5 remote attendees, including a beginner who provided unexpected insights.

Conclusion

While we call ourselves technical writers or technical communicators, our real occupation is managing knowledge or supporting the performance of people when carrying out tasks.

That's why I write and organize, but I also illustrate, refine software, design training, and design interaction.

All of this activity has a social or political component, both in gathering information and as an effect of disseminating information.

Sometimes, the best way to address a situation is to mediate the conversation between people, and Open Space has been a source of inspiration, providing specific practices that can be tweaked to the situation at hand. ■

Joaquim Baptista



Joaquim is the Principal Technical Writer at Millennium bcp. Joaquim has documented large and evolving software products that require industrial writing instead of just writing craftsmanship since 1997. Facilitation is an occasional need. Joaquim is a member of IEEE PCS and a leader at ISTC, APCOMTEC, and EuroSIGDOC.