

# The Genuine Contact Organization

Session 4 of the Genuine Contact™ program



Workshop Leadership

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The overall goal is to have the Genuine Contact™ approach and program make a life nurturing difference in the world. ....	100



## The Intention of Session Four of the Genuine Contact™ Program

The intention of Session Four is to bring the key tools, processes, and approach of the Genuine Contact™ program together with the existing wisdom of the participants to guide participants in their planning and application of developing their organization as a Genuine Contact Organization.

All organizations are learning organizations. In some organizations, this learning is unconscious. It is learning by reacting to the latest needs and crisis. In other organizations, this learning is conscious. It is learning by responding and being adaptive to change, with opportunities to develop new skills and capacities and reflect on lessons learned.

Those that learn consciously operate as solution-focused, inspired, life nurturing organizations that achieve sustainable high performance. These organizations are adaptive and agile. They take advantage of emergent opportunities. They create organizational solutions to challenges. They thrive.

Participants learn how a Genuine Contact Organization can support their organization to develop itself as a sustainable, solution-focused learning organization. This learning is applicable to those who are developing a new organization.

Another intention of Session Four is to assist participants understand how to transform their existing organizational operating model into the operating model offered as the Genuine Contact Organization.

The Genuine Contact Organization is an organizational model well suited to those working on/with Conscious Leadership and Conscious Business. It is an organizational model well suited to leaders committed to organizational well being. And yet another intention of this session is to take a deep dive into beliefs, assumptions, learning and unlearning. All four are needed for transformative personal and leadership development.

Participants wanting to learn to develop and to lead a Genuine Contact Organization are expected to have taken the four pre-requisite Genuine Contact program workshops:

- GCF #1: Path to Organizational Health and Balance—to have received an orientation to the Genuine Contact approach to organizations and time to contemplate your own worldview regarding organizations and regarding the benefits of a healthy and balanced organization.



- GCF#2: Organizational Health and Balance: diagnosis and regeneration—to have received the opportunity to learn some basic tools and to have learned at least one application of these multi-purpose tools—to have learned that change from the current state to the desired state must be led from within the organization.
- GC#1: Working with Open Space Technology: to have received the opportunity to learn the skills and knowledge necessary to facilitate a highly participatory meeting using the method Open Space Technology and to position the meeting in the organization for optimal benefits to the organization.
- GC#2: Whole Person Process Facilitation: to have received the opportunity to learn the skills and knowledge necessary to facilitate a highly participatory meeting using the method Whole Person Process Facilitation and to position the meeting in the organization for optimal benefits to the organization.



## **Design of Session Four Materials**

The workshop is designed with respect that every organization is unique, the approach that every formal leader in an organization uses is unique, and that the starting point of every participant in the workshop will be different than the starting point of the other participants. There is no 'one right way'. The participant will be guided to recognize the right way of working with the Genuine Contact Organization as an operating matrix for the organization upon which the participant can develop a shift in consciousness in the organization. The participant will learn how to work from this shift in consciousness for maximum benefit in the operating of the organization, in the well being of the people involved, and in the resulting outputs and outcomes.

This workshop has been designed to take you through a learning journey, posing possibilities to you and then asking you to become aware of and acknowledge your own interpretation and perspective. We are aware that when you work with the Genuine Contact Organization, you will find yourself in the position of making many decisions and there is no 'rule book' regarding the answers. You will be relying on your knowledge and your wisdom. It is for this reason that this highly experiential workshop is designed to prepare you with the operating matrix within which you can anchor your decisions.

We have also selected words in the possibilities that we pose for you, that are words that you can use if you so wish, when you are speaking with others about the Genuine Contact Organization.

We encourage you to go through this workbook as soon as possible after the workshop and again from time to time to take yourself through deepening your learning. The workbook has been designed to facilitate a self guided learning journey. It is our experience that every time we do the reflection exercises and answer the questions, our answers have expanded from the ones we gave previously, as we ourselves expand through consciously learning and growing.



The workshop is designed to assist participants to develop

- Knowledge for developing a new organization as a Genuine Contact Organization, a conscious learning organization
- Knowledge for transforming an existing organization into a Genuine Contact Organization with its benefits of agility, flexibility, adaptability, and innovation
- Skills in working with the key ingredients of a Genuine Contact Organization to support a solution-focused climate
- Understanding the role of 'consciousness' about the organization and its development
- Knowledge of working with a liberating structure and a participatory architecture
- A practical means for working with the information, knowledge, and wisdom that already exists in your organization and within your broad stakeholder involvement
- An in-depth understanding of the meeting method Open Space Technology
- An in-depth understanding of the meeting method Whole Person Process Facilitation
- An in-depth understanding of the dynamics of repeated use of Open Space Technology in an organization
- Using Open Space Technology and Whole Person Process Facilitation in the development of the Genuine Contact Organization
- A working knowledge of practical and easily duplicable multi-purpose tools and frameworks for the development of the Genuine Contact Organization inclusive of: the Medicine Wheel Tool©, the Deep Essence Tool©, the Grief Cycle, the Organizational Lifecycle, the Storyline
- Your own design to start the development of a Genuine Contact Organization
- A peer-to-peer mentoring circle for ongoing learning

The first part of the learning is focused on the personal beliefs of the participants about leadership, individuals in organizations, and organizations. This will include focus on the preparation of leaders (individuals and management teams) to lead their organizations in a way in which space for freedom to act is clear through a liberating structure, creating conditions for high performance, high creativity, problem solving, and leadership development throughout the organization.

The second part of the learning is focused on deeper examination of the technology and processes that along with people make up the building blocks of the Genuine Contact Organization. The technology is based on specific tools of the Genuine Contact program. The processes that will be examined in more detail are the details of the Open Space Technology meeting, the Whole Person Process Facilitation meeting, and the important role of the planning meeting, the debrief meeting, and the accountability meeting. Participants will go through a process of deepening their personal perception and interpretation of the form and essence of the two meeting methodologies.



The third part of the learning is focused on identifying the form and essence of a Genuine Contact Organization, including the development of a working definition, a plan for developing a new organization as a Genuine Contact Organization, and a plan for shifting an existing organization into operating as a Genuine Contact Organization.

The final part of the learning is focused on what is required to assist an organization in sustaining itself as a Genuine Contact Organization.



## **Part One: Personal Preparation for Leading the Genuine Contact Organization**

### **Why invest in developing as a Genuine Contact Organization?**

Please list items that you believe would be indicators of cost to an organization (possibly your organization) that had problems that get in the way of optimal performance. Once you are satisfied with the list, do your best to estimate the cost when performance is less than optimal.



## **Preparing to Work with the Genuine Contact Organization**

Think of an organization and create a drawing of how it gets its work done.



What do you notice about the role of:

- a. Genuine contact with self?
- b. Genuine contact with one other?
- c. Genuine contact with a collective?
- d. Genuine contact with the bigger creation?



How does this drawing relate to the organizational chart? Is the drawing reflective of the way the organization says it gets its work done (the organizational chart)? Is the drawing of how the organization gets its work done different from the organizational chart? What are you noticing?



Possibly you noticed how the organization already really gets its work done, despite what the formal organizational chart might indicate. Genuine contact is essential in how the work gets done and is usually found in what is called the 'informal organization' and much more rarely found in the formal organization. A challenge on the path to achieve optimal performance as an organization is to merge the 'informal organization' with the 'formal organization' removing the need for the subversion, or "work around the rules" that is usually part of organizational life. This shifts how energy can be focused and used and enables accessing and working from the full potential of what is already present in the organization. We call this merged organization that works from its full potential the Genuine Contact Organization.

Please note your reflections regarding tapping into the full potential of the organization by merging the informal organization with the formal organization, by allowing the genuine contact that is present in the informal organization to be used resourcefully in the formal organization.



## **Preparing Yourself for Working with the Genuine Contact Organization as the Leader/Mentor**

The most important work you can do as a leader/mentor of the Genuine Contact Organization is to know yourself and to take care of yourself, recognizing that you are a precious wise person. Your state of “being” is more important than exactly what you do

Working with the Genuine Contact Organization, as a leader and/or as a mentor, requires deep personal work. It is the work of making genuine contact with oneself and from this place of genuine contact, working on personal development. This will take many paths and through the years will likely bring you to the same point again and again, each time increasing your development.

It is essential to have a daily practice of learning to “BE” in genuine contact with self, with others in one-to-one relationships, with groups, and with the whole organization. Leaders of a Genuine Contact Organization must develop mastery over the art of balancing ‘BEING’ and ‘DOING’.

It is difficult or maybe even impossible to be authentic in mentoring others to be healthy and in mentoring organizations to be healthy if you are not working to optimize your own health. We believe that we each carry deep within us the blueprint to our personal health. To access our personal blueprint for health, we each need to cleanse, nourish and balance our BEING as multi-sensory beings. Our current knowledge of the personal BEING is a being that has a spiritual consciousness, a mental consciousness, an emotional consciousness and a physical consciousness. This knowledge has implications for what the state of optimal health is.



Please take a few minutes to think about what has been presented here regarding the requirements of the personal preparation of the leader and mentor of the Genuine Contact Organization. Also think about what you might need to do personally to develop your capacity to lead and/or mentor the development and then the sustainability of the Genuine Contact Organization.



## **Getting In Touch with Your Assumptions as Part of Your Preparation**

We invite you now to do some of your own reflecting. Please spend some time with each of the following questions and make your notes about each. It is important to be in touch with your own perceptions and interpretations at a deep level inside of yourself. In posing these questions to you, we encourage you to explore your assumptions and beliefs and motivations. As noted earlier in the program, your assumptions, beliefs and motivations affect the group you are working with.

You have a sense now of how powerful Open Space Technology and Whole Person Process Facilitation are as methods for leading meetings. You also have a sense of how much the facilitator can influence what happens in the meeting simply by his/her state of BEING. When working with the Genuine Contact Organization, the same holds true on a daily basis.

What are the key ingredients for a healthy organization? We encourage you to think about what it takes an individual to achieve and sustain personal health and balance. It is helpful to draw parallels examples of an individual when considering the health of an organization. Are there any parallels that make sense to you?



Do you believe that an optimum state of health in an organization is important and if so, why is it important? Isn't business done frequently and well in and from unhealthy organizations? Why invest in health?



What do you believe a Genuine Contact Organization is and why do you think a Genuine Contact Organization is important?



As a leader and/or mentor to organizations, what do you think needs to be done to assist the organization become healthy based on your own perception of health? Draw from any ideas or experience about achieving an optimum state of health in an organization that you already have.



Do you truly believe that the wisdom to do what is needed in the organization is within the people of the organization?



For you, is every organization capable of becoming a Genuine Contact Organization? Are there some organizations, even if the CEO says this is what he/she wants, that you believe do not have the capacity/competency/skills and/or experience to become a Genuine Contact Organization?



For you, is every leader capable of leading a Genuine Contact Organization? What characteristics must a leader have to lead a Genuine Contact Organization?



Can a hierarchical organization remain hierarchical and become a Genuine Contact Organization? In your mind, how does this work. Can you draw it?



Through your exploration of these questions, we anticipate that you are more in touch with your worldview including assumptions about organizations. This assists in your preparation of assisting an organization to become a Genuine Contact Organization.

What are your current reflections about your assumptions regarding organizations, leaders, and leading the Genuine Contact Organization?

Can you describe your worldview about organizations?



In assisting an organization to become a Genuine Contact Organization, you will work as a mentor and assist with skill development. You will also be “holding space” for the physical, emotional, intellectual and spiritual work that will be done in the organization. This “holding space” is “holding space” for the organization to work towards a healthy state. Like most living organisms that “detox” and become healthy, organizations too go through a healing crisis in the process. You will need to “hold the space” well to assist the organization with this.

What does ‘holding space’ mean to you? How do you do this?

What do you believe is required in your personal preparation as a leader/mentor for the development and sustainability of a Genuine Contact Organization?



## **Part Two: Exploring Building Blocks of the Genuine Contact Organization**

### **Open Space Technology**

#### **Brief Description**

Open Space Technology is a powerful meeting methodology for the 21<sup>st</sup> Century. Developed by Harrison Owen, it taps into the spirit of an organization like no other large or small group intervention can. It is now used around the world to enable organizations to learn and achieve beyond their expectations with a simple and even playful approach. Based on clear principles and values, Open Space creates an environment for innovation, problem solving, creativity, teamwork and rapid change. You can learn to "open the space" to engage the full energy of your workforce, to inspire growth and exceptional performance, and to flow with the chaos that will inevitably strike when rapid change is required again.

#### **Brief Description - An Alternative**

Open Space Technology is a meeting methodology that enables individuals and groups to become more effective in work environments that are rapidly and constantly changing by developing their skills as lifelong learners and collaborative problem solvers. It creates the conditions so that the maximum potential of the individual and the organization can be realized.

Open Space Technology captures the knowledge, experience and innovation in the organization that is not captured through less open processes.

#### **Brief Description: Developing Your Own**

On the next page, please write your own notes of your own preferred brief definition of Open Space Technology based on your perceptions and interpretation. Your definition may change over time but for now it is useful to have clarity and focus of your own operating definition. This will help you explore your assumptions. For all of us, our operating decisions are made from our assumptions.



Notes:



We have looked at what Open Space Technology IS. We now look at what it DOES. Below, please write your perspective and interpretation of what an Open Space Technology meeting DOES. Your perspective is your own. It is valid. This is an invitation for you to be in touch with it.



## **Open Space Technology Immediate Results**

Most of the people that we have worked with state that the immediate results from their Open Space Technology meeting include:

1. Solutions and practical fixes
2. The initiative and intent to solve problems
3. The establishment of cross-functional and interdepartmental relationships
4. Surprising learning
5. Real inspiration
6. A feeling of moving forward and new energy and new momentum that occurs by capturing that energy and new insights, awareness, and consciousness
7. Enabled reflection
8. Incredulity that they participated at such an event “why hasn’t this been available before?”
9. Sense of HOPE
10. Sense of frustration about going back into closed space
11. Ownership
12. Seeing gaps in own knowledge and abilities leading to learning
13. Useful questions are revealed
14. Sense of peace-”my issue is on the table and has been agreed to”
15. Sense of peace and gratitude- “I have been heard”
16. Tolerance for frustration has been expanded
17. Conditions for humans flourishing
18. A sense of ownership is awakened
19. Intolerance and frustration developed with other forms of meetings
20. Capacity increased in the individual and in the organization
21. Innate knowledge that something good has happened
22. Community is built
23. Talking happened in greater depth
24. Hostility and alienation from those who did not participate
25. “I don’t know what you have done to us, but it’s been good”
26. This has been results oriented. I have a phenomenal database to network from.
27. Hunger for more
28. Actions were worked on
29. Conversations, real conversations happened
30. Network of talent and diversity was uncovered

## **Open Space Technology Longer Term Impact**

In working with Open Space Technology the Genuine Contact program way, there is a long-term impact from even a single OST meeting. The benefits to the organization are enhanced by our quality standard of having a planning meeting, the OST meeting itself, a debrief meeting with the sponsor, and an accountability meeting about four to six months after the OST meeting. Well done planning prepares the way for a well-done OST meeting and for making maximum use of the outcomes for



the ongoing benefit of the organization. The debrief meeting assists leadership in figuring out 'now what?'. It is the accountability meeting, however, that we attribute the high rate of success with outcomes of the OST meeting. At the accountability meeting, the circle reconvenes and people are accountable to one another in the circle for progress made on commitments from the OST meeting. This has a far bigger impact than accountability up through a hierarchy only. The accountability meeting also creates a new level of consciousness about the importance of responsibility and accountability of everyone to the whole collective. And this shifts behaviors.

In interviewing members of one organization after a year of development as a Genuine Contact Organization (formerly called a Conscious Open Space Organization) that included four Open Space Technology meetings, the comments were similar to what we have found in most organizations we have worked with. We note them below as examples.

1. Participants see the whole organization better and have an awareness of the bigger organizational issues.
2. They are more open to others and the ideas others have and are more tolerant.
3. We have a language and accompanying concepts that have been key for developing a common understanding of our ongoing transformation process.
4. There is performance improvement.
5. People experience themselves as taking risks and taking ownership for solutions.
6. They feel that they start working together to solve problems rather than complaining about problems.
7. There is an increase in productivity.
8. Advanced group (team) skills emerge without particular group or team training.
9. People note that they have inspired performance and that transformation has taken place.
10. Ongoing stories affect the culture.
11. Recommendations are implemented.
12. Morale is up.
13. Total redesign of the organization by the staff and management together.
14. An embracing of Open Space Technology
15. Significant growth of the people who are involved with Open Space
16. People become more flexible with uncertainty
17. Innovation is up with Quality and Quantity
18. There is a willingness to risk

In our experience, the use of multiple Open Space Technology meetings in the same organizations has a dynamism of its own and cannot be done without meetings in between the OST meetings. These in between meetings are necessary in figuring out what to do with the quality and quantity of outputs from the OST meetings. It is



also important to use a meeting format that is congruent with OST, which is why we developed and work with Whole Person Process Facilitation. In our experience, it has been impossible to simply have consecutive OST meetings in an organization without also working to develop as a Genuine Contact Organization. There is a relationship between frequent OST meetings and the desire to work in this way on an ongoing basis.

### **Open Space Technology Your Desired Impact**

Explore your own desired impact for facilitating Open Space Technology meetings or for bringing Open Space Technology meetings into your organization. Why are you involved with Open Space Technology? What do you want to achieve through your investment in this work?

We ask that you probe further into your perspective of what Open Space Technology meetings really do. Possibly, in the previous pages, you have developed a list of positive elements of what Open Space Technology does. What about these positive elements? Is this what an Open Space Technology meeting really does or is this reflective of your own hopes and desires and reason for working with Open Space Technology? Is it possible for an Open Space Technology to do the opposite of what you have thought it does? And if so, why might this be so?



## **Role of Formal Leaders**

In an Open Space Technology meeting, leaders need to be present and to participate the same way everyone else does with the exception of making some brief opening remarks. Prior to the meeting, they approve the theme (focusing question) and the parameters “givens” for the work including broad outcomes and a clear statement of what will happen to the information from the meeting, but after this, they need to let go of control. The most senior formal leader of the organization really “opens the space” in the organization for the consultant/facilitator to facilitate the Open Space Technology meeting.

If participants feel that they do not have full support to move on their own energy wherever it leads them but must second-guess what the boss is thinking, the process will not work. Consultants, therefore, need to work carefully with the executive group beforehand to ensure that the space is really being opened for a participative process. It does not matter if the space is large or small, but the space that is opened must be truly opened for participation, by the sponsor. If it is not truly open and leadership wants to be in control, do not use Open Space Technology.

## **Role of the Facilitator**

The form of Open Space Technology is simple to follow and as Harrison Owen says, an Open Space Technology meeting can be facilitated by anyone with a good head and heart who has read *Open Space Technology: A User's Guide* (see bibliography).

It is the job of the facilitator to get the space “opened” (until the space is opened, the process is quite controlled) and then to interfere as little as possible. The facilitator “holds the space”. An understanding of the essence of Open Space Technology is needed. It is surprising how many decisions are required by the facilitator as situations arise. Making the decisions from an understanding of the essence of Open Space Technology is key to ensuring that the facilitator does not inadvertently “close or fill the space”. In our experience understanding only the form of Open Space Technology is insufficient guidance in decision making.

There are conditions and timing that is ideal for an Open Space Technology meeting. When conditions are ideal, understanding the form only is enough. However, in our working experience, most of the Open Space Technology meetings we facilitate are within situations and time frames that are not the ideal. We have to decide if the situation is one in which we can facilitate an Open Space Technology meeting to achieve the desired overall outcome i.e. a one-day meeting about the organization in which there is a lot of conflict will likely bring the conflict to the surface but not allow sufficient time for it to find its way to solutions.

If we know that two days is needed for a particular situation and only one day is given by the sponsor, we need to decide if we should do the Open Space



Technology meeting or if we may in fact feel we are doing more harm if we do that particular meeting under circumstances that are less than the ideal for the situation we are faced with.

The facilitator leads the opening, the evening news, the morning news and the closing circle. While “holding the space” the facilitator attends to the computer station and the printing of reports and so on. Attending to the computer station is a good way for the facilitator to be present, to have interactions with individuals, and to keep out of the way of the group work.

The only time the facilitator should intervene is if there is a “space invader”. Sometimes this happens during the opening, on rare occasions someone attempts to close the space during the process. Otherwise, the facilitator should not intervene even if asked but simply assure the group that they can solve whatever they are wrestling with. The facilitator does not go from group to group ensuring that things are running smoothly.

#### *Role of the Leader and of the Facilitator - Your Perspective*

Please include notes below of your perspective of the role of the leader and the role of the facilitator in the Open Space Technology meeting.



## Key Ingredients of an Open Space Technology Meeting

In the following pages we take you through an exploration of the key ingredients of an Open Space Technology meeting. Later in our learning journey we will invite you to explore the duplication of each key ingredient into the daily life of the organization.

### *The Form*

Following is a list of key ingredients of an Open Space Technology meeting which you may or may not agree with as making up the key ingredients of the Open Space Technology meeting.

- The circle
- opening
- morning and evening news
- The breath
- A theme or focusing question
- Givens or “non-negotiables or root assumptions”
- Four Principles
- Law of Mobility, with Bumblebees and Butterflies
- Development of the agenda
- Marketplace/Bulletin Board
- Reports
- Newswall
- Convergence
- Action Planning
- Closing circle

### Your Perspective and Interpretation

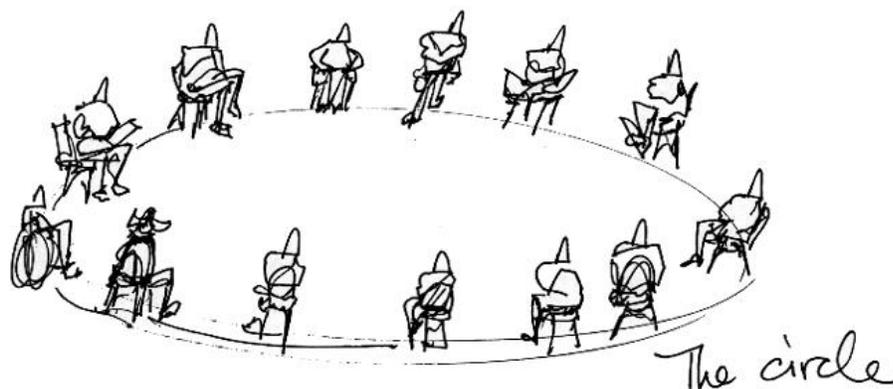
In the following pages, we invite you to think of these ingredients one at a time and determine for yourself why each ingredient is important or not for you, and what you believe the purpose of each ingredient is for the meeting, the essence of that ingredient in relation to creating Open Space. As you do this, identify those ingredients that you believe are not essential for a meeting to be an Open Space Technology meeting. Identify ingredients for you are missing from the list on the following pages that you would add in terms of your perspective and interpretation of what an Open Space Technology meeting is.



We invite you to consider that within every aspect of the form, you are facilitating in both the physical and metaphysical aspects of the gathering. What does this mean for you? As you go over the list of key ingredients, please determine whether consideration of the metaphysical and physical aspects influences your perception and interpretation of each of the ingredients.

We invite you to write notes of your thoughts about each of these as ingredients in an Open Space Technology meeting:

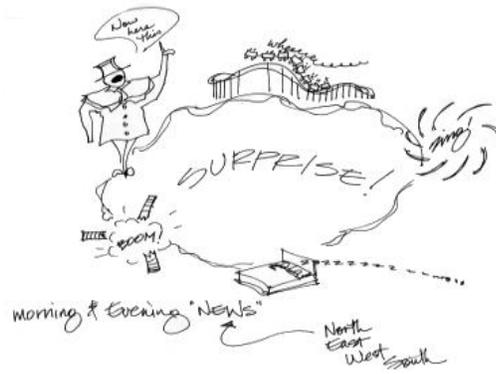
The circle



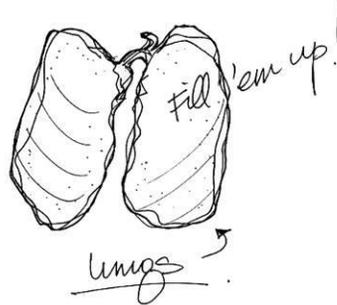
The opening by the facilitator including walking into the center and walking the inside of the circle



## Morning and evening news



## The breath



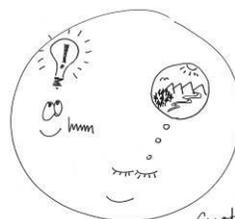
The Breath



A theme or focusing question



Givens or "non-negotiables"

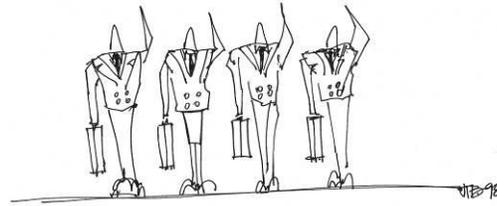


Creativity  
Imagination  
Innovation  
Wonder

OPEN SPACE  
bounded by the Givens

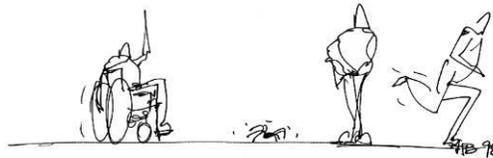


## Four Principles



~~Four Principles~~  
Principles

## Law of Mobility with Butterflies and Bumblebees



The Law of Mobility



## Development of the agenda

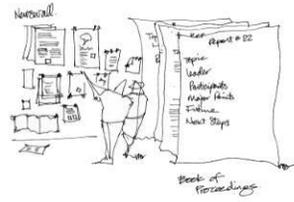
### Marketplace/Bulletin Board

*The Bulletin Board  
The Market Place  
DO IT!*





## Reports



## Newswall



Convergence

Action Planning



## Closing Circle

In my perception of Open Space Technology, I would remove the following items from the list presented above:



In my perception of Open Space Technology, I would add the following items to the list presented above:

For me, the following is what I will attend to regarding the form of Open Space Technology:



## **The Essence**

Underneath the form of Open Space Technology is the essence. We encourage you to determine for yourself your own understanding of the essence of Open Space Technology. Become aware of your interpretation of the essence, acknowledge it and then make your decisions based on your understanding.

For us, the essence of Open Space Technology is to work with Spirit. Our understanding of Spirit includes our invitation to be co-creators in our free will universe, to work from love rather than fear, to evolve our consciousness, and to be aware of, acknowledge and work with our personal energy and harmonics, our collective energy and harmonics. For us, this is tied up in our perception and interpretation of Spirit. For others, Spirit becomes small “S” spirit.

All interpretations of the essence of Open Space Technology are fine. There is no right and no wrong.

Below, we list elements of essence that are interesting to examine. Each of them is contained within Open Space Technology and some will assist you in speaking about Open Space Technology with others.

- Becoming aware of, acknowledging, and working with the potential of individuals and of a collective
- Critical mass problem solving and “buy in” to solutions
- Practice in navigating with change to increase skills, competence and capacity. Change management is an oxymoron
- Adults exercising their choices and responsibility as adults, breaking patterns of submission and complacency
- Opening space for Spirit to be worked with
- Within Open Space Technology, we experience a self organizing system
- Within Open Space Technology, we experience the organization as it really is under the surface

## **Change is Constant**

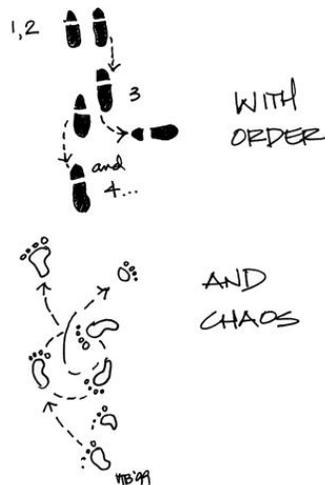




## Learn to Dance with Chaos and Order

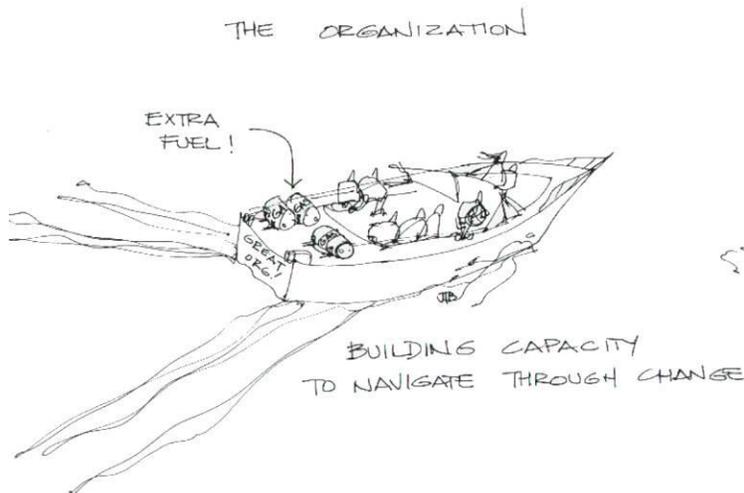
Sustained organizational success depends on knowing what the pattern is, where the excitement is, how much structure is needed, how much free form for creativity, innovation, imagination...inspired performance. In other words, working with both order and chaos.

### LEARN TO DANCE



*Sustained organizational success depends on knowing what the pattern is, where the excitement is, how much structure is needed, how much freedom to act.*

## Building Capacity



The individual builds personal capacity to navigate through change by doing yoga, meditating, and so on. The individual builds personal ability, skills, and practices to navigate through life and to make the most of life.

Open Space Technology can be seen similar to yoga. Through Open Space Technology, there

is a building of skills, ability and practice to navigate through change, making the most of the opportunities available in a constantly changing context.



## Opening Space for Spirit



### **The Essence - Your Perception and Interpretation**

We invite you to make genuine contact with your beliefs about the essence of Open Space Technology. For you, does the essence include the physical, emotional, intellectual, and spiritual? What does this mean for you? Does your exploration of the essence of Open Space Technology take you to deeper places in the physical and metaphysical?



In the development of your perception of Open Space Technology, it may be helpful for you again to look at the list we initially posed to you regarding aspects of the essence. What items would you delete from this list and what would you add to this list to assist others in understanding the essence of Open Space Technology so that they can make informed consent regarding bringing Open Space Technology into their organization?

- Becoming aware of, acknowledging, and working with the potential of individuals and of a collective
- Critical mass problem solving and “buy in” to solutions
- Practice in navigating with change to increase skills, competence and capacity. Change management is an oxymoron
- Adults exercising their choices and responsibility as adults, breaking patterns of submission and complacency
- Opening space for Spirit to be worked with
- Within Open Space Technology, we experience a self organizing system
- Within Open Space Technology, we experience the organization as it really is under the surface



## **Values and Underpinning Principles**

There is no right or wrong answer about the values and underpinning principles of Open Space Technology. It is important to become aware of and acknowledge your own perception and interpretation. To develop your clarity about the values and underpinning principles, please draw from your reflections about the essence.

This is the knowledge you will need as you make decisions when you conduct an Open Space Technology meeting and when you coach an organization to working as a Genuine Contact Organization.

For me, the values and underpinning principles are:



## **Whole Person Process Facilitation**

### **A Short Definition of Whole Person Process Facilitation**

Whole Person Process Facilitation is a highly participatory method of facilitating meetings that produces results by tapping into the creativity and collective genius of the people. Whole Person Process Facilitation, as well as being a method of meeting facilitation, also provides a holistic operating matrix that is versatile enough to include a variety of other meeting methods and tools within this operating matrix for the meeting, When the phrase Whole Person Process Facilitation is broken down into three phrases, working with the 'Whole Person' and working with the 'Person Process' and working via 'Process Facilitation' are all key in facilitation of this meeting methodology.

We Invite You to Create Your Own Definition of Whole Person Process Facilitation



In using Whole Person Process Facilitation, the facilitator of the meeting thinks through the following when designing the meeting:

1. Creating an accepting rather than defensive climate. Placement of chairs, role of food, other décor, attitude and responses. Being conscious of the implications of actions and behaviors of the facilitator.
2. Introductions. The difference between authenticity and icebreakers.
3. Hopes and fears as a way of identifying objectives.
4. Right placement of your statement of objectives for your meeting/teaching session.
5. Adult learning styles using the Learning Style Inventory.
6. Right brain + Left Brain + easily connecting integrated use of the two = whole brain learning and problem solving.
7. Intuition.
8. Transfer in.
9. Bridging between each component so that there is a seamless flow.
10. Varying the levels, the facilitator works on-in front of group, with group, apart from group.
11. Maximizing energy of the group by doing activities singularly, in pairs, triads, fours, whole group. How and when to use each of these and how to use them to work with each other to keep the energy high.
12. Timing.
13. Attending to energy of the facilitator. Taking care of the facilitator.
14. Working with people as multi-sensory beings, beyond the information that is provided by the five senses and intellectual knowledge.
15. Feedback tied into hopes and fears.
16. Evaluation that is useful and also part of the ongoing learning experience, sometimes done weeks after the meeting

Review the 16 items, noting your thoughts about what is done and why it is done:

1. Creating an accepting rather than defensive climate. Placement of chairs, role of food, other décor, attitude and responses. Being conscious of the implications of actions and behaviors of the facilitator.





6. Right brain + Left Brain + easily connecting integrated use of the two = whole brain learning and problem solving.

7. Intuition.

8. Transfer in.

9. Bridging between each component so that there is a seamless flow.



10. Varying the levels the facilitator works on-in front of group, with group, apart from group.

11. Maximizing energy of the group by doing activities singularly, in pairs, triads, fours, whole group. How and when to use each of these and how to use them to work with each other to keep the energy high.

12. Timing.

13. Attending to energy of the facilitator. Taking care of the facilitator.



14. Working with people as multi-sensory beings, beyond the information that is provided by the five senses and intellectual knowledge.

15. Feedback tied into hopes and fears.

16. Evaluation that is useful and also part of the ongoing learning experience, sometimes done weeks after the meeting

In my perception of Whole Person Process Facilitation, I would add the following items to the list presented above:



In my perception of Whole Person Process Facilitation, I would remove the following from the list presented above:

What does a Whole Person Process Facilitated meeting really achieve?



## **Using Planning, Debrief and Accountability Meetings to Build the Foundation**

Every time that we are engaged by an organization to do an Open Space Technology meeting, we approach our preparation with the organization for the meeting in the way that best sets the context for development as a Genuine Contact Organization; an organization that can obtain maximum effectiveness from its true potential.

We like to do our foundational work well, in part so that the foundations are already laid should the formal leadership of the organization want to work to become a Genuine Contact Organization, creating the same high performance in daily organizational life that they experience in the Open Space Technology meeting. We believe that experiencing an Open Space Technology meeting as a participant, including the reflections made possible in the closing circle is the best way to assist leadership in the organization to have had a lived experience that the potential in the organization is higher than the usual day to day experience. Once the formal leadership has experienced the performance in the Open Space Technology meeting, there may be greater confidence about operating with the same high levels of performance on other days of the year, within the daily life of the organization.

As you familiarize yourself with how we use a single Open Space Technology meeting to assist the organization in fast tracking towards performing as a Genuine Contact Organization, we encourage you to pay attention to the benefits that could be gained from every action we will describe below.

### **Preparations Prior to the Open Space Technology Meeting**

We have a pre-event meeting with the sponsor to plan for the Open Space Technology meeting and if at all possible, to include:

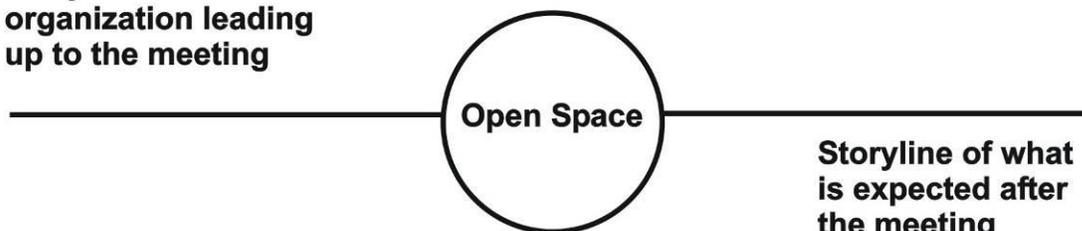
- a story line to identify what of significance led up to the Open Space Technology meeting and what is anticipated to occur after the meeting
- a discussion highlighting that Open Space Technology works at the level of the deeper essence of the organization, at the level of purpose, values and assumptions
- a discussion about the effect of grief work within the organization, and that the Open Space Technology event itself is a catalyst for grief work
- organizational lifecycle that includes spirit and structure

Of course, this meeting also involves getting ready for the Open Space Technology event such as determining the theme, the givens, and the logistics including the invitation.



## ***Using the Storyline***

**Storyline of  
organization leading  
up to the meeting**



We draw this simple diagram and ask the sponsor to tell us the story of the organization that led up to choosing to have an Open Space Technology meeting and the story of the organization as they now see it that will follow the Open Space Technology meeting.

The intention is to bring to the awareness of the sponsor that this is not a meeting for the sake of having a meeting but a meeting that will have an impact on what occurs in the organization following the meeting. The discussion is always interesting, and it is our experience that this is usually the first time that there is real reflection about the impact of the meeting.

This exercise also allows us to start making notes about what we are hearing as “the givens”. We note these at this time but don’t ask for verification until later in the meeting.

And of course, this exercise gives us a great deal of data, often informing us on whether the theme they have chosen is the right one for the meeting.



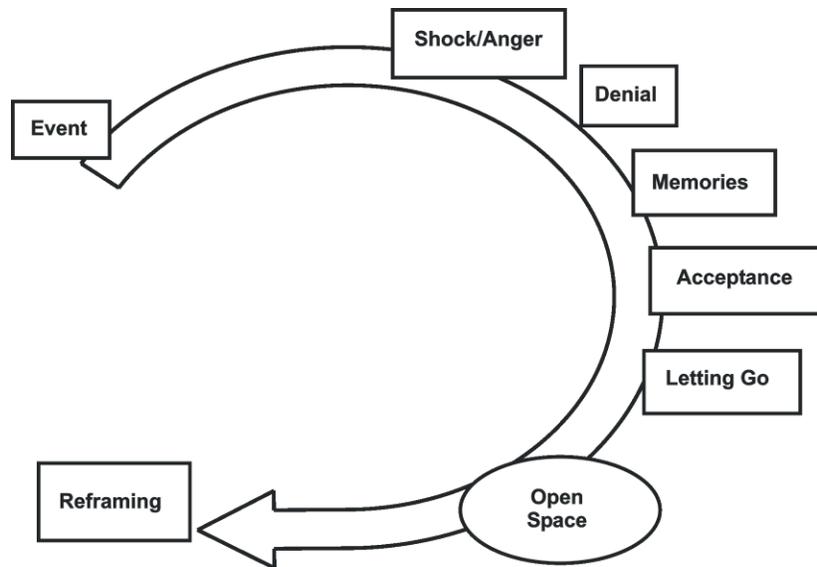
## ***Attending to the Grief Cycle***

We draw the diagram on this page, a view of components of the grief cycle and explain to the group that the cycle of grief is always being cycled through by all of us, including by all persons in the organization. We explain the simple stages and then identify the special place where Open Space Technology is most effective if the meeting is about looking at the future.

We ask the group to note for us where they believe their organization is in relation to the grief cycle, or if they see different aspects of the organization to be in different phases of the grief cycle at this time.

This assists in understanding whether the theme chosen is the right one for this particular time in the organization. If the organization is in a stage

of accepting the state of the organization and wanting to move on, it is a good time for an Open Space Technology meeting about the future. If the organization is in shock/anger/denial because of recent events, the Open Space Technology meeting should not be less than 2 ½ days if the meeting is about the future. This allows people time to process some of what is sad and mad for them prior to shifting focus to solutions for the future. Or the design for the Open Space Technology meeting could include a night of storytelling prior to the Open Space Technology meeting to allow for memory work to aid in working through the grief cycle. Remember that no one can be pushed to go through the cycle more quickly than they are prepared to go. However, time for memories assists those who are ready. If a story telling evening is designed into the process, a 1 ½ day Open Space Technology meeting will do.



## ***Bringing Attention to the Cycle of Grief at Work***

It is helpful to the sponsor to understand that grief work is part of everyday life and that different persons in the organization are at different stages of grief about different situations to do with work and to do with their personal lives.

The Open Space Technology meeting, even if filled with good solutions, will usually initiate new grief work. The closing circle may be positive but grief at work may be



evident Monday morning. Note that unfortunately, this is often misunderstood as resistance to change.

*The Special Place of Open Space Technology in the Cycle of Grief*  
(as taught by Harrison Owen)

Harrison Owen identified that after the stage of letting go, prior to the stage of reframing for the new, there is a time of Open Space during which creativity, wonder and imagination have a place to frame what will happen in the future.

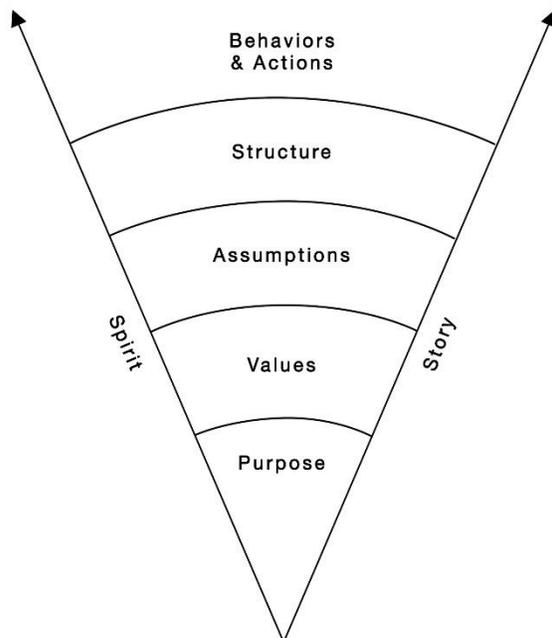
Harrison notes that this is one of the most powerful times for Open Space Technology. Note that the most thorough work on grief cycle was done by Elizabeth Kubler-Ross and grief work in organizations by Amir Levy and Uri Merry (see bibliography).

We also speak about the Open Space Technology meeting having an impact on grief cycle work that will be different for different individuals in the organization following the meeting. We caution that even if the closing circle includes many comments of happiness and fulfillment, the same people who spoke positively in the circle might be going through anger or denial on the next work day as they assimilate the changes that might affect them and their work, even if the changes are good and positive.

We suggest that it is a good idea for the sponsoring group to bring information about the cycle of grief at work to the managers and for the managers to work with this information by highlighting it for their teams. Many organizations have reported back to us that speaking about the cycle of grief at work has been of great help amongst the staff, has affected people by being more compassionate with one another rather than judging one another, as well as giving managers a different filter to view what might be happening, reducing conclusions about “resistance to change”.



## Acknowledging Deep Essence



We remind the sponsor that most of what is happening in the organization is happening at the unseen level and yet most organizational interventions including training programs try to “fix things” at the visible level of behaviors and actions. Most sponsors agree that these interventions and training sessions have not had the desired effects.

We point out that Open Space Technology works at the deeper and invisible levels of the organization. This includes the depth that occurs when participants identify assumptions and speak about values and purpose. We point out that this is one of the reasons why Open Space Technology is so powerful in bringing about change and

transformation and in bringing forward solutions and the intention of the participants to work with the solutions.

We also point out that this is one of the reasons why Open Space Technology tends to surface “the Dead Moose”. In other words, “the Dead Moose” includes the problems of the organization that most people know exist but are never discussed except outside of the organization like in parking lots. It is important to us to identify for the sponsor that if something is wrong, it will likely be spoken about and that they need to be prepared to be surprised.

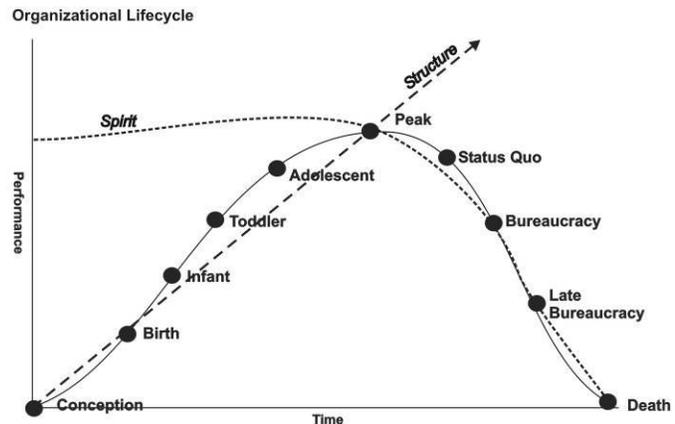
Open Space Technology quickly achieves working from the deep essence of the organization. When the deep essence including purpose, values and assumptions are worked with, changes to behaviors and actions are often achieved without any intentional work on behaviors and actions.

Similar to the “iceberg theory” that we learned years ago, Open Space Technology works at the unseen aspects of the organization which rarely gets attended to and yet has such a profound impact.



## Model of Organizational Lifecycle

We draw this diagram for the sponsor and ask them to identify what organizations that they are aware of are in late bureaucracy. They usually identify government, health, education and some others. We then ask where they see their organization. They will note this, initiating a dialogue about the effect of the Open Space Technology meeting based on placement of the organization in the organizational lifecycle diagram. This is further information that may be helpful in getting the theme and the “givens” right. If the organization is in late bureaucracy and has a large amount of structure and spirit is way down, and one of the “givens” is that structure is not to change, it will significantly decrease the freedom of the meeting in a way that may frustrate many people who are wanting to identify and work with new and appropriate structure to re-spirit the organization and improve productivity, effectiveness and morale. Likewise, if the organization is in the toddler phase, it might not have enough structure to support spirit. The subject of structure also needs to have the freedom to be expressed in the Open Space Technology meeting.



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The Open Space Technology meeting will work no matter where the organization is at in its lifecycle. The ability of the meeting to bring about transformation is impacted. This of course is dependent too on the theme and the “givens” for the meeting and whether the meeting is about significant change or not.

Harrison Owen used organizational lifecycle work based on a bell curve approach developed by Ichak Adizes (see bibliography) with a growth phase and a decline phase to more realistically portray an organizational lifecycle. He introduced the concept of spirit in relationship to appropriate structure as essential for a healthy organization.

There is a critical point when there is too much structure for spirit to flourish. It is helpful for a sponsor to know about organizational lifecycle and the role of Open Space Technology in finding a way to identify appropriate structure for spirit in the organization. This framework can be helpful when reviewing the reports of the Open Space Technology meeting.



### ***Theme and the “Givens”***

Throughout the entire meeting in reviewing the story-line, grief cycle, deep essence, and the organizational lifecycle, information will have arisen that affects the choice of the theme, the “givens”, and the design including duration of the meeting.

We use all of this information when we take the group through the task of identifying and verifying the “givens” and then in finalizing the wording of the theme. Quite often, it is at this time that extra time is needed because members of the group cannot agree on the “givens”. We find that the time spent in getting clarity on the “givens”, especially when the sponsoring group is the management team, is as helpful as the Open Space Technology meeting itself in bringing about positive organizational change.

Sometimes, it is clear to us that the time required for the Open Space Technology meeting and the time the sponsor is willing to hold the meeting for are not a good fit. We suggest less broad themes if this is the case and themes that are in keeping with where the organization is within its grief cycle work (i.e. not to go with a theme of opportunities for the future if there has just been serious downsizing without appropriate opportunity to grieve what has happened). Sometimes, we remove ourselves from the contract if we don't believe the meeting, within the time frame and theme, will work. Sometimes, at this point, we recommend other meeting methodologies.

### ***Clarifying the Right Theme***

The theme should be appropriate to what is happening in the organization at the time. Decisions also need to be made about whether it should be a broad or narrow theme. Possible themes are...

- Future of the organization
- Future of this community
- Setting strategic directions
- Plan and or initiate a project
- Achieving or sustaining organizational excellence
- Developing standards of performance...
- The possibilities are endless



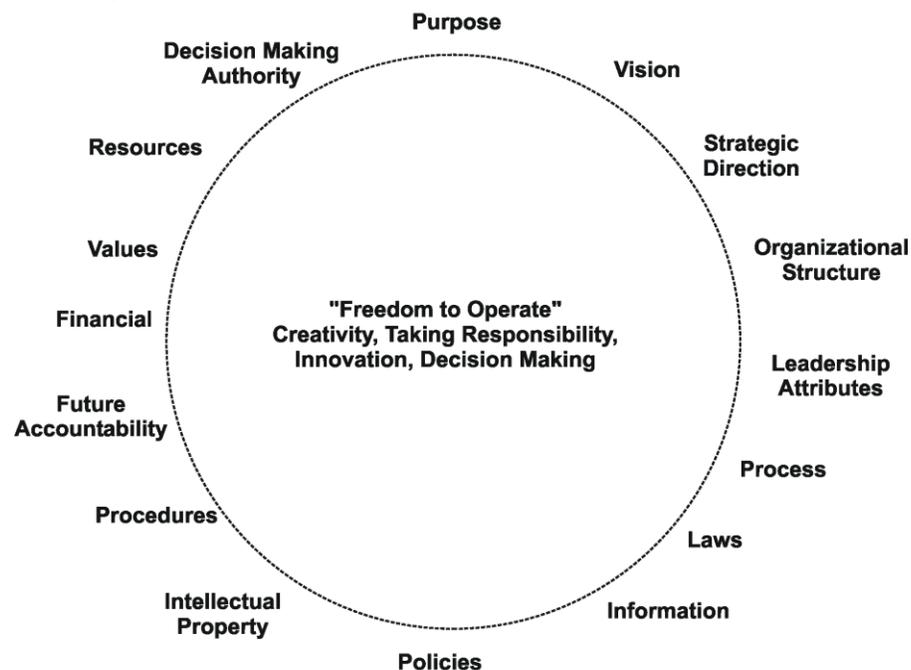
## Discerning the “Givens”

Simpler is better! Always pull back to the barest essentials by asking the questions “is this really a given? is that true? how do you know it is true?”

Discern, clarify, and communicate the givens accurately relating to:

- Purpose
- Direction
- Laws
- Structure
- Financial
- Process
- What is to happen with the information from the meeting
- How the group will know what has happened in the future as a result of the meeting via communication or another meeting during which they are accountable to each other
- Handling of matters of confidentiality for competitive edge/intellectual property

It is critical that what happens to the information from the meeting include what actually happens with the reports (how far a field do they go?) and what authority if any is given for items to move to action or whether the items still need to be approved after the meeting by someone in authority before action can occur. Either works. It is essential for the givens to be communicated early in the process, preferably as early as in the invitation.





## Preparations during the Open Space Technology Meeting

During the Open Space Technology Meeting we utilize key ingredients of facilitating an Open Space Technology meeting that from our perspective ensures the best possible experience of Open Space Technology that we can create for the group.

We ask you to remember our earlier discussions about Open Space Technology and Whole Person Process Facilitation and our encouragement for you to develop your own list of key ingredients that have meaning for you. There is no agreed upon list of key ingredients that are *essential* for these meeting methodologies to work. Later on in our learning journey we will ask you to reflect again about your list of key ingredients of these meetings and what each of these key ingredients might mean in a Genuine Contact Organization. For the moment, we simply pose for you our experience that this initial Open Space Technology meeting, and how it is facilitated, is a critical foundational aspect of the Genuine Contact Organization. This allows the group to work from a lived experience rather than from a theory regarding their learning and development as a Genuine Contact Organization. You will have enabled them to have a common experience, common in the collective consciousness, to develop from. In our experience, the following key ingredients are the ones that we use whenever we can when facilitating an Open Space Technology meeting:

- A circle for the opening, evening news, morning news, and the closing. Use of temple bells to call the group together
- welcoming (and prior to the welcome to the meeting, ensuring that people are there by invitation rather than command)
- Reminder to people to take a deep breath, to breath and to look around the circle at each other as though for the first time, to see each person as a wise person and to recognize that there is great wisdom in the room
- Theme
- Givens or non-negotiables or root assumptions clearly stated in writing and in our opening
- Four principles
- Law of mobility and mention of bumblebees and butterflies
- Building agenda through passion and responsibility
- Self selection of topics
- Marketplace, bulletin board
- Reports, preferably using computers for entry, formulation of book of proceedings
- Newswall
- Convergence to determine the will/passion of the collective
- Action planning of the converged items if the givens for the meeting include action

As the last step of the closing circle, we always use the version of the medicine wheel as a framework for reflection that was developed by Harrison Owen, creator of



Open Space Technology. He introduced the use of this framework for the closing of an Open Space Technology meeting. In terms of adult learning, participation in the Open Space Technology meeting is action and the use of a framework at the end allows for moments of reflection, deepening learning through action/reflection. Within the medicine wheel, at the end of the Open Space Technology meeting, we reflect about leadership, vision, community, and management that were experienced during the Open Space Technology meeting. We do not offer reflections of our own nor challenge the participants to reflect more about this experience in relation to their daily experience in the organization. It is enough at this point to create the conditions for the participants to bring their reflections about leadership, vision, community, and management to their collective consciousness

For the participants, it is always a moment of awe as people recognize the greatness with which they achieved their own work together, peak performance, community, high morale, productivity within knowledge that leadership is everywhere, vision is shared, community is vibrant, and self management is evident.



We use this version of the medicine wheel at the end of an Open Space Technology meeting.



### **Preparations After the Open Space Technology Meeting**

After the Open Space Technology Meeting we hold a debrief meeting with the Sponsor (CEO, managers and others). It is essential that the CEO and other senior leaders be part of this. Ideally this meeting takes place at least a day after the OST meeting but not more than one week later. On occasion, it has been necessary to have the meeting immediately following the OST meeting, but this is less effective in terms of grief cycle work as the individuals involved have not had sufficient time to move on through the grief cycle if there was anything that came up in the meeting that brought shock.

During this meeting, we cover the following with the group:

- Their reflections about the Open Space Technology event. How they are feeling about the event.
- Focus on how items are to move forward, a reminder about grief work. Who might be in grief as a result of the event? What might that manifest like in the organization and what can be done to make this go well? How might items be sorted into Do It, Clarify It, Open Space It as a framework to see success quickly? Within this segment of the debrief meeting, we also work out what is needed to hold an accountability meeting back to the collective in the future...about four to six months after the Open Space Technology meeting. In so doing, we engage in conversation about the impact of accountability back to the circle and not simply up through the hierarchy, complete with the collective of people developing awareness about how items are successfully executed and where the barriers are to getting others to completion.



- Reflection about what we experienced together regarding leadership (in everyone), vision (shared vision even if not written), community (high morale, community, communication), and management (self managed) during our Open Space Technology meeting together. Is the experience of these the same as in their daily organizational life? And if not, what do they see as different?

It is at this point that the discussion can shift into a discussion about capturing peak performance, high play, high learning, productivity, good communications, high morale in daily organizational life. The discussion is well rooted in their experience from the Open Space Technology meeting, from their recent lived experience of what is possible from their workforce. It is for this reason that we built in so many opportunities for reflection along the way. It opens the likelihood for a discussion that is based in their reality, in the experience of the gap they now see between the achievement of the workforce in the Open Space Technology event, and the achievements in daily organizational life.

In some cases, the discussion ends here, with the CEO saying that he/she wants high success but is not yet ready for using Open Space Technology to achieve it or simply not wanting to use Open Space Technology. In other cases, the discussion shifts to an exploration of what is possible. Whatever the decision, it is exactly the right decision for that organization at that time.

In situations where the CEO wants to capture high performance of the Open Space Technology meeting on a daily basis, we explain that it is possible for the organization to find its own way to achieve this state and that it does not require external consultant assistance. We explain that it is a matter of finding ways to parallel the ingredients of the Whole Person Process Facilitation and Open Space Technology meetings that they have experienced with us and set these ingredients in place in daily organizational life. We raise the concept that we believe that every organization has great potential and the wisdom within it to excel, but that usually there are too many things in the way of using this wisdom to achieve peak performance.

We engage in conversation about what they discovered was really present underneath when they held their Open Space Technology. We say that this was simply a window into what is present in the organization.

Sometimes the CEO thanks us and tells us of his/her intention to develop the organization as a Genuine Contact Organization. Sometimes the CEO asks us if we can assist with this development. We are always delighted at the opportunity when it presents itself. Sometimes we do this work ourselves and sometimes we provide the names of Genuine Contact professionals who are in their area.

We invite you now to reflect about what we have just presented regarding preparing for the Genuine Contact Organization before, during, and after the Open Space



Technology meeting. Don't forget that after the Open Space Technology meeting, as well as the debrief meeting, there is provision for a way to have an accountability meeting after four months. What made sense to you? What did not make sense to you? What would you do differently?



## **Part Three: Becoming a Genuine Contact Organization**

No matter the starting point, it is possible to develop your organization as a Genuine Contact Organization. Work is currently getting done in your organization. If you believe that the potential is greater than what you are currently experiencing, different patterns must be developed than the ones currently followed. All organizations are learning organizations. Your organization has learned particular patterns in how it gets its work done, despite the organizational chart of how it says it gets its work done. It may be time to invest in moving beyond the old patterns by learning new patterns that assist your organization to excel. Your organization is capable of shifting from the dualism of having a formal and an informal organization, towards one organizational whole that is genuinely getting its work done in the way it says it gets it done. Word and actions end up in alignment.

The fast track to developing as a Genuine Contact Organization relies on beginning with a well-done Open Space Technology meeting that brings the whole system into a meeting to explore the issues and opportunities for achieving organizational excellence. All aspects of a well-done Open Space Technology meeting including using WPPF for a pre-meeting, the OST meeting itself and how it is facilitated, using WPPF for a debrief meeting, and again for an accountability meeting are key elements of the fast track towards a highly functioning Genuine Contact Organization.

### **Expanding from What is Already Present**

Within the depths of the organization and how it gets its work done, sometimes buried quite deeply, we experience the organization as it really operates when it gets its work done.

We believe it is important to bring this from the background where it is not visible to the foreground where it becomes visible. This is useful information from which members of the organization can examine the reality of how the organization performs its work. When both the formal and informal organization are in the conscious awareness of everyone involved, a shift in perspective is possible to develop an organization that works from its full potential. The Genuine Contact Organization is already present in the organization somewhere. The work to be done is not so much one of linear development, but of shifting tracks of what is already present. Leadership must lead differently to tap into the true wisdom in the organization for sustainable optimal performance.



What are your reflections about the concept that the Genuine Contact Organization is already present and simply needs to be uncovered and worked with in a way that benefits the organization, its people, and the potential of extraordinary results?

From your perspective, what are the implications for formal leaders and how leadership needs to be carried out? What are the leadership competencies and capacity needed?



## **The Work Ahead: Maintaining What Works, Transforming What Needs Transforming, Creating New Where Needed**

### **1. Maintaining What Works**

Even at the visible level of behaviors and actions, it is important to recognize, acknowledge, and work with and from what is already working in the organization. People need to be given the opportunity to identify items that work well just as they are. They could also be encouraged to identify which of these items can be enhanced a little.

### **2. Transforming What Needs Transforming**

There will be components of the work process and structure that need transforming from where it is, to a new state. Again, the people involved will find their way with this, when space is opened for them to explore what is needed. A consultant/facilitator is needed to facilitate the knowledge inherent in the organization.

### **3. Creating New Where Needed**

There will be the need for the creation of new processes and new/ appropriate structures in relation to what needs doing in an inspired way that is sustaining and renewing. The new/appropriate structures should be liberating for the creativity of the people involved. Within the liberating structure, a participatory architecture is needed.



## Your Turn

Assume that you have an entire year to bring about changing an organization from its present mode of operating to operating as a Genuine Contact Organization. External consultant time is to be kept to a minimum in the design. We encourage you to look at all of the work you did in understanding the Open Space Technology meeting and the Whole Person Process Facilitation meeting and the planning meeting formula as the building blocks to assist the people in an organization to understand and develop as a Genuine Contact Organization. Determine for yourself what can be extrapolated from these meeting methods and the particular way that the Genuine Contact program uses to work with Open Space Technology and Whole Person Process Facilitation meetings to develop the design for the daily life of the organization operating with the same high level of performance as is achieved in these meetings. We encourage you to pay attention to both the form and the essence of the planning work and the meetings.



## **Your Perceptions and Interpretations**

### ***Your Reflections Regarding Genuine Contact as a Key Component of the Genuine Contact Organization***

We believe that a key component of the success of the meeting methods Open Space Technology and Whole Person Process Facilitation, and the Genuine Contact Organization is that genuine contact is fostered and becomes integral in the meeting and in the organization. This relates directly to our belief that success in organizations depends on relationships.

Please note your reflections about genuine contact: genuine contact with the self, genuine contact with one other, genuine contact with the collective. What does this mean for your work with the Genuine Contact Organization?



### ***Your Reflections Regarding Spirit and the Organization***

We believe that the Genuine Contact Organization assists us in working with Spirit. We believe that Spirit is present and that we are simply uncovering our access to Spirit and working with Spirit. Please note your reflections about working with Spirit. What does this mean for your work with the Genuine Contact Organization?

### **Your Vision, Beliefs and Assumptions**

Having developed a design for which you had input and participated in the presentation of designs from other groups, you probably have new clarity and focus regarding your own vision of a Genuine Contact Organization. We now invite you to reflect about your own vision, including your beliefs and assumptions of what is possible and how to get there.



## **Creating a Definition**

Develop a way of describing the Genuine Contact Organization so that others will understand it. Challenge yourself to get this down to as few words as possible.



The Design Used by Dalar International Consultancy, Inc.  
a sample design for your consideration

We use the Medicine Wheel Tool© as the framework for our mentoring work with the organization.

When working with the Medicine Wheel Tool you enter into the wheel through the center, where we find purpose. From there, we work to the north in leadership, then around in a clockwise direction through vision, community and management. The cross signifies relationships and the circle signifies the environment within which the organization works.





## Key Ingredients of the Genuine Contact Organization

Within the framework of the Medicine Wheel, we work with a simple list of key ingredients. You will recognize most of these from our work with a singular Open Space Technology meeting.

The exception to this is the notion of a healing crisis or freedom shock. These do not seem to occur in an Open Space Technology meeting, but they often do with repeated use of Open Space Technology meetings in the same organization when people experience the positive changes.

In the Genuine Contact Organization, we pay attention to:

- Storytelling promoting awareness, collectiveness, empathy, truth
- The grief cycle at work promoting understanding and tolerance
- The story of the organization including purpose, values and vision
- The deep essence, working with what is not seen
- Holding as many meetings as possible using Open Space Technology
- When holding a meeting that is task focused that is not appropriate for Open Space, use Whole Person Process Facilitation
- Working with chaos and order by learning about them and navigating with them rather than trying to manage them
- Removing barriers
- Clarifying “givens” for the organization and clarifying “givens” for each OST meeting
- Demything the organization
- Bringing the processes and changes to everyone’s awareness
- Organizational lifecycle
- Providing resources
- Understanding authority, accountability, and responsibility in a framework of working with energy from passion and responsibility
- Formal leadership committed to leading and managing in a different way and understanding the difference between leading and managing
- Freedom shock



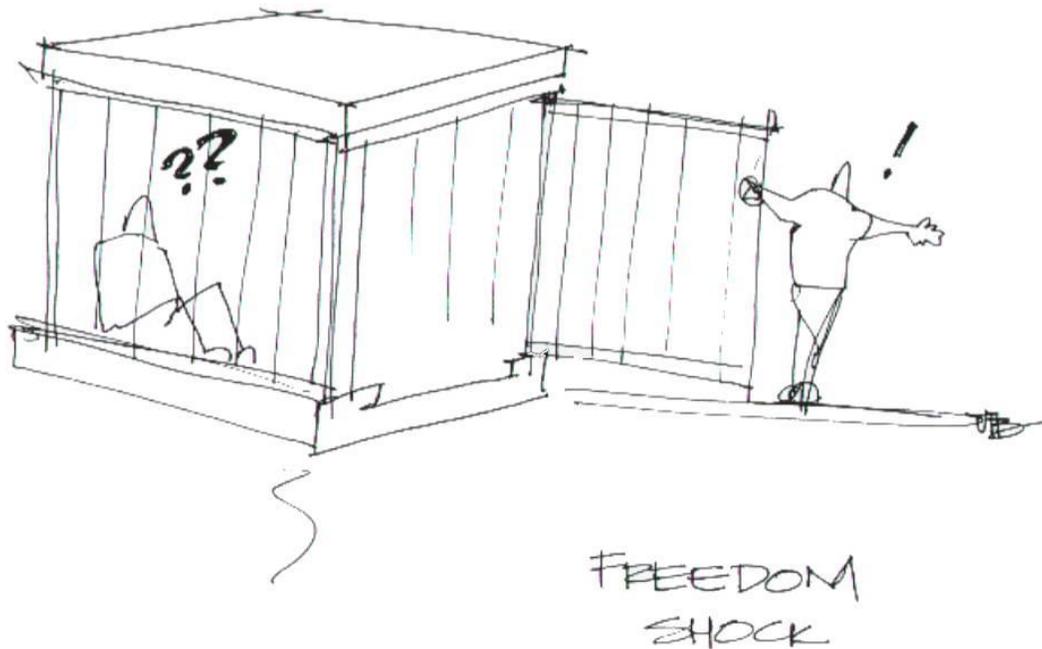
## Demything the Organization

DE-MYTH THE ORGANIZATION



A huge breakthrough is achieved when work is done to "limit the givens or non-negotiables to those which are actually true for the organization.

## Freedom Shock





## **Who Leads the Process of Becoming a Genuine Contact Organization?**

There are many difficult moments in the journey of this transformation. There is added complexity and difficulty because it is not possible to present the organization and the individuals within the organization with a model of how things will look when we shift from the current operating system to the new one. And there is no clear “there” as in a point of destination or arrival. It becomes clear that the process of becoming doesn’t end.

It is possible for the senior formal leader in an organization to lead the organization through this transformation process. However, it is very hard for this person because the person is attached to outcomes by the very nature of being CEO. When troubles come, it can be frustrating.

It is easier in the initial stages to have a coach or mentor through the process, coaching and mentoring the CEO, the management team, and the balance of the organization. Our experience is that the coaching for an organization or department of 100 persons requires about 30 days of time of the coach, over a period of about 9 months. The primary recipients of the coaching are the CEO and management team, to provide skills and practice for leading the Genuine Contact Organization. With this support, the CEO and management team lead the process of becoming a Genuine Contact Organization, an interconnecting learning organization. They in turn, coach and mentor the others in the organization.

In organizations of larger than 100 people, the same formula as above applies with the one layer of the work focusing on the CEO and his/her leadership team and their immediate reports. As well, every department is worked with individually. In this case, the head of the department leads the transformation of the department. The organization is made up of multiple departments.

### **The Chief Executive Officer**

Becoming a Genuine Contact Organization must have the full commitment of the CEO. We simply do not move forward with the development of the Genuine Contact Organization without a contract with the CEO that this is what she is committed to. The leadership during the transition and sustaining the new state of operating is not possible without this commitment.

By definition, the CEO is responsible and held accountable for operations. This means that if the CEO believes that operations will be enhanced, staff morale and productivity enhanced by the shift to the Genuine Contact Organization, it is his or her decision and not the decision of the collective. This is the person who is held fully accountable for the decision.



The transformation of a division or department requires the division or department head to lead the transformation in their business unit. Sometimes this leadership is done willingly with a belief that shifting to the Genuine Contact Organization is beneficial to the unit. However, unless the CEO involved the department and division heads in the decision to make the shift to a Genuine Contact Organization, there may be an unwillingness. Care is taken to work with these leaders would need to figure out the benefits of the shift in the operating matrix and to have significant input into the design and proceedings

## **Job of the Mentor**

The CEO, if trained in working with the Genuine Contact program, could lead in all that we describe on the following pages but for the purpose of this training program, we direct the words to the consultant who is engaged to be the mentor to the organization through the process of transformation. This mentoring job needs to be done by an external consultant in the initial stages especially while sorting the organizational “givens”. An internal consultant is not perceived as neutral and in fact could not be objective enough to get the job done when the going gets a bit difficult as people, including the CEO, grapple with change. Once the initial work is done, it is best if an internal team, trained in this work, takes over and that the external consultant be available for coaching and support only if requested. The skills need to be established and used from “in house” for sustainability.

The primary job of the mentor is to work with the CEO and senior management team. The CEO and senior management team can in turn work with the middle managers and the front line as coaches to them. In our experience, it is better not to do this in a cascade approach of having the middle managers as the ones to work with the front line, but rather having them all worked with by the senior managers, sometimes as one large group and sometimes in separate groups. In some organizations, the CEO and the senior management team prefer the external consultant to lead in mentoring all layers of the organization through the change process. We would give the CEO the option at the time of contracting, because the amount of training of the CEO and senior managers would depend on whether this team will in turn train the others.

## **Job of the Mentor Regarding Data Collection**

With an organization of about 100 people, it takes about 30 days of consulting time over a period of about 9 months. Each and every contract varies, and the timing suggested below for each activity is a guide only. Be prepared to adjust accordingly.

It is critical, as you make your decisions as a consultant to set situations up for the highest learning opportunities for the individuals involved, so that they can demonstrate to themselves their own knowledge and expertise. Be very careful not to create situations of dependency on you (a great temptation for consultants). We always ask the question “whose priority” before making a decision, to ensure we are meeting the need of the client and not our own needs in our decisions.



## ***Phase One Data Collection***

You will be working with the story of the organization and a quick assessment of organizational health.

A) Story of the Organization – it is best to do a series of individual interviews, usually two people from each level of the organization is enough in the way of interviews to find out the story. Don't forget suppliers, customers, volunteers and Board members in your data collection.

We find that the best way to get the data you need is to get anecdotal information – qualitative rather than quantitative data. We tend to use one ranking question on a scale of one to seven, with one as low and seven as high, and ask how one would rate the organization in terms of fulfilling its purpose. And then we ask three questions to get at more data--why did they rank it this way, what suggestions do they have, and any other comments. Harrison Owen simplifies this to asking two questions “who are you?” and “who should you be?” as an organization.

Interviews are scheduled one an hour. It is best to get all interviewing done quickly, on consecutive days – remember, even this intrusion is an intervention and usually brings fear and anxiety to the surface, as well as some anticipation and hope.

The data can be written anecdotally and can be quantified and recorded in a number of ways so that the story as it is currently perceived is shared throughout the organization. (Consultant time: 3 days for interviews, one for report)

B) To do a quick assessment of organizational health, we meet with three levels of the organization separately.

With each group, we present the medicine wheel highlighting six of its aspects: leadership, vision, community, management, relationships, and purpose. We get information from the group in a variety of ways about where they see the organization in terms of strengths. Often, colored dots and the invitation to place these on the wheel where strengths are perceived is great. And we ask for comments and record them. We explain that all organizations need strengths in all six aspects to be healthy. And we explain it is not uncommon to get out of balance.

We then introduce them to the concept of the grief cycle and the importance of understanding it and its effect within organizations. And we draw it and ask them to position themselves as individuals and where they see the organization as a whole.

And then we introduce them to the organizational lifecycle chart and again ask them to identify where they see their organization and why.

We do up a report on our analysis of this, keeping the feedback from the different layers separate. If they are all congruent, this is good information. If they are not, it is



also good information. Each session takes about six hours. (Consultant time: 3 days and 1 day report. Sometimes, due to shift work or the size of organization, the front line is broken into more groups and therefore more time is required)

It is best to share the report of your assessment of organizational health with everyone and this will be handled differently in every organization. Sometimes you will be involved at the senior level only in the report back and sometimes you will be involved throughout. The sharing of the report throughout should be negotiated with the senior managers at the start and communicated at the start of the process. Do not engage in secrecy of your findings (except that individual names are not attached to their comments). This stage, as well as being about data collection, is also one step of bringing truth to the surface and demything the organization.

In our report we include suggestions for working towards organizational health and use the medicine wheel as a framework. This includes strengthening the areas that are weak and that to achieve and sustain health, there will need to be a different way of operating. We focus on the importance of balance, again using the medicine wheel as a guide.

The CEO needs to acknowledge his/her commitment to organizational health, that everyone will be involved, and that to start the process, formal leadership will be the first ones to work with the consultant. This message is important so that people don't think of your work with the senior team as a new set of secrets. We encourage the senior managers to speak about what they are learning with us with their staff teams regularly. (Consultant time: one or more days, depending on whether you are the primary person to share the report)



## **Job of the Mentor & Senior Management Team**

### ***Phase Two: Skill Building, Capacity Building, and Practice with the Senior Management Team***

#### **First Meeting:**

Discussion of the findings and the level of organizational health. Draw from the experience that they had in an Open Space Technology meeting, reminding them of the untapped potential that is there. The order to achieve health begins with purpose, then on to leadership, vision, community, and management and finally addresses relationships. (Consultant time: one day). Identify that your work with them in assisting them to become a healthy organization (a Genuine Contact Organization, an interconnected learning organization) will follow the medicine wheel.

#### **Second Meeting:**

Purpose: process facilitates this group to determine the purpose of the organization. You can explore more deeply with them whether or not the actions and behaviors including decisions are congruent with fulfilling the purpose. (Consultant time: one day)

#### **Third Meeting:**

Continuing to work on leadership, two days of having the management team learn to do some basic process facilitation so that all meetings with staff tap into the wisdom of the staff and enable their highest possible learning. (Consultant time: two days)

#### **Fourth Meeting:**

Vision. Use process facilitation (again a learning experience for managers in how to do this) to determine what the vision of the CEO is for the organization, what the vision of the senior managers is, and if there is congruence amongst them. Work with them to clarify the vision, to focus it so that it is easily communicated. Remember that vision is about the future, about creating something that rallies to aspire to be reached, that can be rallied toward by all staff. It must be an enlivened vision of the future (Consultant time: one day)



### ***Phase Three: Focus on Community***

Four days of Open Space Technology training so that skill, knowledge and capacity is built within the organization for using Open Space Technology and to enable 'insiders' to facilitate their own meetings in Open Space Technology if they so choose. There should be a discussion about what they are learning and how this now informs how they will lead in a way that creates the conditions for community to work with the formal leadership. (Consultant time: four days)

In this phase we use storytelling and Open Space Technology to start building community and to challenge the senior management team into awareness and acknowledgement of their intention to really work with the potential of the staff. This is where they start to "walk their talk". Are they willing to have a story telling evening prior to the Open Space Technology meeting? Are they willing to have an Open Space Technology meeting? Are they willing to commit to further Open Space Technology meetings to work at items that come out of this one?

Often there is a lot of fear, so be prepared to be like a midwife in coaching saying it is all normal. Work with the senior management team to develop the theme and the givens for an organization wide Open Space Technology meeting of 2 ½ days. The broadest theme is best (i.e. issues and opportunities for developing into an organization of excellence). Working at the givens for the event is important not only for the event, but also to practice doing this. (Consultant time: one day).

When discussing the "givens" assist the management team to determine how it will communicate its work on purpose and on vision. Will the purpose and vision statements that they have created become "givens" or are they open for negotiation. How and when will they be communicated?

We have found that the management team will usually decide that for the coming year, the purpose and vision statements that they have created will be "givens" but they will announce that in a year's time, the purpose and vision statements will be open for negotiation.

Hold a story telling event the evening before the Open Space Technology meeting in which stories are told (inviting sads, glads, mads, accomplishments, struggles) to honor the past and present. This is critical like an Irish wake, before moving to the future.

Then facilitate the Open Space Technology event. Action planning is to be included and is to identify if the item is "do it", "clarify it", or "open space it" keeping in mind that you would have sorted out in the givens the level of freedom to move things to action after the event. (Consultant time: four days)



### ***Phase Four: Focus on Management***

Do a debrief meeting with senior management about the Open Space Meeting from the perspective of how to make the most from the meeting in the ongoing life of the organization.

How can items from an Open Space Technology fit into existing work processes and the existing structure?

If the results of the meeting cannot be fit, what can be done? Does the existing structure allow the organization to take advantage of new opportunities, new creativity, new ideas?

If yes, how will communication take place so that the organizational whole can become aware of activities as they take place?

Is a system of framing with Do It, Clarify It, Open Space it one that works for them?

Do multi-disciplinary teams work or should work that comes from an Open Space Technology meeting go to established work teams? How will this work?

What other kinds of changes would need to take place in the organization to provide resources and remove barriers (i.e. a common one is a different performance review focus? How will technology assist?) This is a time to identify these items, not a time to thoroughly discuss them (Consultant time: one day)

Then shift this into a discussion about management. This is usually very very scary for managers, while they wonder what their own role is, and is actually very frightening to middle managers. It is clear from the Open Space Technology meeting that there is capacity within the organization to self manage, and yet appropriate structure is needed to support the organization. Present management with the following as a list of key ingredients for management: suggesting to them that there is a key but different role for managers.

#### **Management**

While traditional organizations require management systems that control people's behavior (the days of span of control), in the Genuine Contact Organization management is required to create the conditions for high learning in the individual and in the team, improved quality of thinking, reflection, the ability to develop shared visions and shared understanding of complex business issues and opportunities.

Management creates conditions for self organization and choice and freedom to act. This requires a participative architecture for the organization. The architecture includes a liberating structure and frequent use of highly participative meetings.



Management ensures adequate resources and removes barriers. Processes, systems, and things are managed. People are not managed, nor can they be. Within a Genuine Contact Organization, leadership leads people and management manages for resources and barriers.

A Role of Management Is...

- To recognize chaos and work with it as a midwife in a birthing
- To discern, clarify, and communicate the givens accurately
- To attend to the story of the organization including purpose/values
- To ensure and enable the growth of appropriate structure
- To focus grow and cultivate the spirit of the organization
- To ensure that barriers are removed
- To let go of control

A Role of Management is to Remove Barriers including barriers caused by:

- Insufficient skill training
- Unnecessary regulations
- Poor equipment
- Poor workspace
- Bad information systems

A Role of Management is to Grow Appropriate Structure

Whether the structure is steeply hierarchical, flat lined, a circle, or some other configuration is not important. What is important is that the structure is appropriate to support the Spirit (dynamic purpose and pure potential) of the organization. This requires work like a gardener; planting, nurturing, watering, pruning, cutting back, fertilizing, attending to at times and leaving alone for nature to do its work at times.

We then do an exploration of what this means for them. How do they see their jobs changing, if at all? How do they see accountability, responsibility, and authority? We emphasize that much of what is needed and how the organization has really gotten its work done is now formally being acknowledged and that there is no need of the formal and informal organization. This can become one.

Please take time now to reflect on the implications of what has just been presented. How do you see the role of management changing? What do you think is required in terms of accountability, responsibility, and authority? Any other thoughts?



We work with the Finance function to determine how it might need to change to support this way of working.

We work with the Human Resources function to determine what might need to be changed to support this way of working. We take extra care to ensure that the performance measurements for the individuals and the working units in the organization include measurements for assisting with the change process, thriving in ongoing change, and high performance. We have found that in almost every instance where the staff is not working towards an improved way of operating as an organizational whole, there is no credit given to them for assisting in this improvement, but they are measured on other parameters.



We work with staff to examine what other systems are needed to support the organization and with existing systems explore whether they support the organization or whether something needs to be changed so that the systems support the fulfillment of the purpose and achievement of the vision. We have observed many organizations in which there are excellent systems that would get high marks in any management audit, and yet fail as organizations. There seems to be a missing link between management systems and what it is that is being managed in relation to the purpose and vision.



It is critical to give the management team the time and space that they need to discuss the possibilities of all of the changes that they might go through. At this time, it is too soon to determine the structure and the changes definitively although some may be determined.

We guide the senior managers through the need to set up some of the same ingredients for the organization that are needed for an Open Space Technology event. The work of demything the organization is really hard for them at this point. We have sorted out the theme for the organization when we did the purpose work. We now tackle the givens for the organization. We find it useful to find out from each layer of staff what they believe the givens are, and then to bring everyone together to see what the interpretation of each layer is. While everyone is together, we take these lists and work at developing the givens for the organization that are really the givens. The givens in headline form generally take a half day to generate within the bigger group. Sometimes the initial work with the senior managers on this topic takes a few days and with the other layers, one day per layer. (Consultant time 3-6 days)

Work is done through the senior management team to help staff realize that the givens make an operating contract between management and staff, that some of the givens need more details for clarification (through operating policies and procedures), but that all that is not a given is open for wonder, creativity and imagination, and the development of solutions. Clarification and understanding of the “givens” also clarifies the scope of freedom.

A decision needs to be made about how often the “givens” are to be reviewed. We suggest annually. In some organizations, “givens” are determined by management only, with no input from staff. This also works.



## Developing the Operating System

Every organization determines how they want to develop as a Genuine Contact Organization in a way that is unique to them. This needs to be led by the senior managers, with coaching by the consultant.

Items to be worked on throughout the organization include:

- Working at the details of the givens (including operating policies and procedures) which can be sorted out using process facilitation or open space technology
- Working at how open space technology meetings will be arranged and how the follow up from them is to have the opportunity to be carried out (providing resources and removing barriers)
- Working together with the staff to determine how the circle, breath, four principles, law of mobility, bulletin board and marketplace etc. are to be created in the ongoing organizational context. Working at what the appropriate structure is for supporting the work of the organization

Managers are eager as well as frightened to work in the new way. They are usually both frightened and eager to attend to the agreed upon items as key ingredients of their jobs and they need practice. Some may want some additional skill development. They are critical in providing appropriate structure to keep the Genuine Contact Organization operating well. This of course continually evolves.

We find the training we offer through the Genuine Contact™ Program which was designed for this purpose, to be helpful for in-house skill, knowledge and capacity development. This would include training in Open Space Technology, Process Facilitation, and Cross Cultural Conflict Resolution. Some of this training was received by the Senior Management Team during the developmental phase of becoming a Genuine Contact Organization. It is good to have all managers, human resource and organizational development personnel also go through the training. This could happen at the same time as it was offered to the senior managers, or separately.

There is no one right way to develop a Genuine Contact Organization. We have shared our way with you including some of the things we take into consideration. We find it helpful to discuss the operating matrix from a perspective of a liberating structure with a participatory architecture. Our way of guiding leaders to develop their organizations as a Genuine Contact Organization has worked in a number of cultures around the world, relies on simple tools and processes and is duplicable.

There are many many moments as people go through change during which there is fear and agony. Just like in a birthing, it is important to give assurance that all is normal. And to celebrate the moments of joy also!



Freedom shock throughout the organization needs to be worked with and this generally occurs after a few Open Space Technology meetings. And demything the organization is maybe the most critical piece of this work.



## **Your Reflections Regarding the Dalar design and the Genuine Contact Organization as an Operating System**

Please note your reflections about the Genuine Contact Organization as an Operating System. What does this mean about your work with the Genuine Contact Organization?



# Part Four: Sustaining the Genuine Contact Organization

## Second Round of the Medicine Wheel Tool

You might think at this point that you have reached your goal and that the change

work is done. Just as with life, change is constant and working with change in organizations is constant. The Medicine Wheel Tool™ will serve you well as you continue to work with change in the organization. It is a navigational compass. Working with this navigational compass on an ongoing basis, year after year, assists the organization continuously develop its capacity to navigate with change for optimal benefit to the organization. The tool is a circle, with no beginning and no end. Thus, round two begins, and subsequently, round three and so on, visiting each component of the wheel again and again, but always at

new and higher levels of learning.





## Thank You

It is now time for our own closing circle. Thank you for participating in this learning journey. We ask that you complete an evaluation form before you leave.

And of course, we would be delighted to see you take the full Genuine Contact™ program. Training dates and locations are available on at [www.genuinecontact.net](http://www.genuinecontact.net).

And if you were pleased by this program, please pass word on to others. Thank you and journey well.



## Credits and Acknowledgements

- This workshop was created by Birgitt Williams of Dalar International Consultancy. Birgitt and Ward Williams created the Genuine Contact™ program and approach and can be reached at [www.dalarinternational.com](http://www.dalarinternational.com).
- Open Space Technology was created by Harrison Owen and is described by Harrison Owen in his books published by Berrett-Koehler.
- Whole Person Process Facilitation was created by Birgitt Williams and Ward Williams of Dalar International Consultancy, Inc with a foundation in the work of Marge Denis of Stillpoint, Huntsville, Ontario, Canada in Process Facilitation.
- The manuals and other media for the Genuine Contact™ program were designed and produced by Rachel Bolton of Dalar International Consultancy in Kitchener, Ontario, Canada. She can be reached at [rachel@dalarinternational.com](mailto:rachel@dalarinternational.com).
- A comprehensive bibliography for the Genuine Contact™ program and a recommended reading list for this workshop is available by going to our list serve at [www.genuinecontact.info](http://www.genuinecontact.info).



# Genuine Contact Quality Commitment

## Pre-amble

Genuine Contact™ Professionals have adopted a holistic approach to leadership and organizational development based on the approach, program, and power of the Genuine Contact Program. They have developed competence in working with at least Whole Person Process Facilitation (Module 2) of the Genuine Contact Program to assist leaders and organizations in their development.

Genuine Contact Professionals, when working with modules of the Genuine Contact Program in their work as organizational consultants, leadership development consultants, and meeting facilitators, work within the scope of the modules that they have developed competency in. Genuine Contact Professionals may also apply different meeting methodologies like World Café, Appreciative Inquiry if they seem more suited to the business goal.

Depending on the needs of the client, a Genuine Contact Professional can pull larger teams together from amongst the Genuine Contact Professionals, and others whose work is in alignment with our quality commitment, when needed.

To ascertain if someone is a Genuine Contact Professional, a client can check with the Genuine Contact Program Director at [gcprodir@gmail.com](mailto:gcprodir@gmail.com). While the Program Director cannot remark about the competence of the person, s/he can verify that a Quality Commitment has been made. Leaders and organizations seeking to engage a Genuine Contact Professional are responsible for selecting him/her and doing their own reference checks.

Genuine Contact Professionals make the following commitments to ensure the most beneficial results of their work and recommit to this Quality Commitment annually.

## Quality Commitment

I assure the quality of my work with the following:

### Meeting Facilitation

When working with the Genuine Contact™ approach to facilitate meetings, I follow an established protocol which includes preparation meetings, facilitation of the main meeting, facilitation of a debrief meeting, and ensuring a follow up accountability meeting whenever possible. I use Whole Person Process Facilitation as the participative and creative method for the preparation and debrief meetings and either Open Space Technology or Whole Person Process Facilitation or another participatory approach such as Future Search, World Café or Appreciative Inquiry (all credible participatory meeting methods) for facilitating the conference or main meeting.

Even when meeting methodologies are used that are not part of the Genuine Contact program, they will be conducted within the operating matrix of a Whole Person Process Facilitation meeting, when possible.

Upon completion of the conference and/or meeting, I can provide my clients with an evaluation, based upon participant feedback upon request.



## Longer Term Consulting Services for Personal Development, Leadership Development and/or Organizational Development

At the time of contracting, I and my client ensure that we have:



- clarity about the business goal of the assignment
- leadership considerations regarding success of the assignment in the organization
- expectations of the client (deliverables)
- who the people are who need to be involved for the assignment to be successful
- the design
- how the relationships will be worked out for success
- how the collective intelligence of the organization will be accessed if needed.

A schedule of review meetings will be established for course correction as needed in relation to the initial scope of the agreement. I understand the importance of continuous review and change rather than waiting until the final review.

## Personal Competence, Capability, and Capacity Development

As Genuine Contact Professional, I commit to my ongoing personal competence, capability, and capacity development with:

- Ongoing participation in the Genuine Contact mailing lists (international & language-specific if available)
- International Genuine Contact Mentoring Circles (in person as well as in online environment)
- Regional and/or local Genuine Contact Mentoring Circles
- GC Newsletters / Blogs
- Participation in at least one Genuine Contact training annually, either through intensifying learning in a familiar module or taking additional modules, to be done in person, on-line, or by reviewing a GC training workbook.
- Any other engagement in Genuine Contact activities

## Environmental Protection Policy

I use food, materials and techniques that ensure the least possible negative impact on the environment. This includes - whenever possible - but is not limited to recycled (flipchart) paper, water based markers, refill-products, organic food, snacks and drinks, energy saving technical products.



# The Genuine Contact™ Program

## Beliefs, Components, Key Concepts and Foundational Givens

Birgitt and Ward Williams designed the Genuine Contact™ program with simplicity in mind. The program, focusing on attending to organizational health and balance as a foundation for organizational success, uses meetings as a catalyst for organizations to develop as conscious, life nurturing, interconnected creative organizations. Meetings are used as a catalyst. Management learns to manage differently. We call these organizations Genuine Contact Organizations. The process is organic so that every organization brings about its own unique change from within.

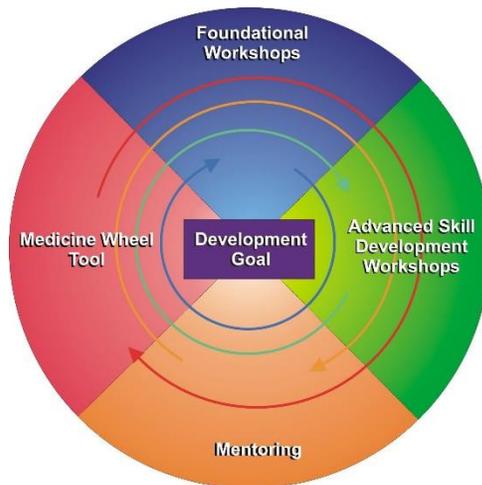
## Beliefs of Genuine Contact

Within the Genuine Contact approach and program, we work from the following five foundational beliefs:

1. We believe that spirit or Spirit matters, that through spirit or Spirit, all of creation is connected, and that people are precious.
2. We believe that every organism (including the organization) has within it the blueprint for its own optimal health and balance.
3. We believe that focusing on genuine contact enables individuals and organizations to achieve the individual and organizational health and balance that is needed for optimal effectiveness. Positive change in the organization is directly linked to positive change in individuals. Both are required for sustainable new ways of working.
4. We believe in keeping it simple. Simple frameworks and processes enable success with complex situations. In keeping it simple, we recognize that any sustainable change must begin from the inside and cannot be externally initiated or driven.
5. We believe that change with its accompanying loss, grief work, and conflict is constant. Organizations that develop mastery in working with change can sustain optimal effectiveness. These leaders and organizations recognize that change cannot be managed, that energy spent trying to manage change is wasted energy, and that productive use of individual and organizational energy is achieved by working with change rather than against it.



## Components of the Genuine Contact™ program



The Foundational Workshops and Advanced Skill Development Workshops make up the Genuine Contact program and approach. The series provides skill, capacity, and competency development in the Genuine Contact program as well as providing the conditions to assimilate the Genuine Contact approach.

1. Foundations 1: Path to Organizational Health and Balance offers leaders an opportunity to make the difference in the performance of your organization through the importance of balance, cleansing, and nourishing in a way similar to the holistic approach to the health of the human body.
2. Foundations 2: Achieving and Regenerating Organizational Health and Balance explores the state of health of organizations from a holistic organizational growth perspective and aids in developing your own prescription through a self administered diagnosis, towards achieving and maintaining a healthy organization in these rapidly changing times..
3. Foundations 3: Individual Health and Balance explores the state of individual health and how to maintain a state of optimal health even in highly stressful situations.
4. Foundations 4: Holistic Leadership Development develops the skills, capacity and knowledge for the new leadership paradigm 'leading so that people will lead' and to nourish a culture of leadership.
5. Advanced Skill Development 1: Working With Open Space Technology develops and enhances skills in facilitating meetings in which a frequency is held for people to make life nurturing choices from amongst agenda items within a particular theme and givens.
6. Advanced Skill Development 2: Whole Person Process Facilitation develops and enhances skills in facilitating meetings in which a frequency is held for people to make life nurturing choices based on what is presented to them to solve within a particular topic and within stated givens.
7. Advanced Skill Development 3: Cross Cultural Conflict Resolution develops and enhances skills to facilitate meetings in which people determine personal boundaries and view situations from flexible rather than fixed perspectives.
8. Advanced Skill Development 4: The Genuine Contact Organization develops and enhances skills in leading and mentoring conscious interconnected learning organizations. These organizations provide the conditions for choices to be life nurturing rather than life depleting.



9. Advanced Skill Development 5: Train the Trainer develops and enhances skills to teach others in all of the components of the Genuine Contact™ program, ensuring that the program maintains its integrity (wholeness) and respects the unique contributions that each individual makes to the program.
10. We offer Mentoring as a forum to learn the art of mentoring and to walk the talk of mentoring of both individuals and organizations.
11. We underpin the Genuine Contact™ program with the healing circle or medicine wheel as the overall matrix for our learning, healing, development, evolution and consciousness. As Medicine Wheel Tool© it assists us in walking the mystical path with practical feet and bringing about results that exceed expectations.

### **Key Concepts of working with Genuine Contact™**

There are 9 key concepts supporting the foundational beliefs and development of the Genuine Contact Program:

1. Opportunities for genuine contact begin with the courage to be in genuine contact with the self and extend into all relationships.
2. Work of, with, from, and to Spirit can be experienced as a harmonic resonance that can be facilitated, beginning with establishing the harmonic resonance within the self as the facilitator. This requires discipline in a state of BEING in this harmonic resonance as the key work for the facilitator. In doing so, we work with healing energy, drawing from knowledge in the healing arts.
3. We work with the blueprint for health in the organism (the individual and/or the organization) by attending to balance, cleansing, and nourishing.
4. Change is constant and organizations must be developed to thrive in change. Organizational effectiveness in motion is a required organizational capability if they wish to thrive in future times of intense change.
5. We use meetings as a catalyst to assisting the organization attain a state of health and balance. The two meeting methodologies used are Open Space Technology developed by Harrison Owen, USA and Whole Person Process Facilitation developed by Birgitt, USA. Both meeting methodologies are highly participative, within a boundary established by predetermined "givens".

Within Open Space Technology, a harmonic frequency is held for people to make life nurturing choices from amongst agenda items within a particular theme and givens.

Whole Person Process Facilitation was developed by Birgitt Williams to complement working with Open Space Technology as a meeting methodology equally as participative, with similar values, and yet serving the organization when a process as open as Open Space Technology is not appropriate to the agenda and circumstance.

Within Whole Person Process Facilitation, a harmonic frequency is held for people to make life nurturing choices based on what is presented to them to solve within a



particular topic and within stated givens. The topics are predetermined, thereby offering a more obviously structured agenda than Open Space Technology.

6. We believe that a liberating structure, combined with a participatory architecture is essential to achieve and sustain organizational health and balance so that organizations are highly effective and able to thrive in constant change.
7. We work with Open Space Technology and Whole Person Process Facilitation as interventions that enable health and balance in the ongoing life of the organization. We recognize these meeting processes as powerful and impactful in the ongoing life of the organization, therefore we attend carefully to both the pre-work (before a meeting) and the debrief work (after the meeting).
8. We recognize that everyone facilitating and leading using the Genuine Contact™ program will do so with their own unique style and experience. However, it is also necessary to guarantee to organizations who bring this program into the organization that they are receiving consistency with the component parts and/or their development as a genuine contact organization. Clients are entitled to assurance that when they engage in any components of the Genuine Contact™ program, that it maintains integrity. Within the Genuine Contact™ program, the components are standardized and can be easily duplicated. When any of the components are offered in an organization, the client is guaranteed of a certain standard.
9. Component parts of the program have value if taken on their own.

### **Foundational Givens of the Genuine Contact™ program**

Birgitt and Ward Williams established minimal Foundational Givens for the Genuine Contact™ program. Foundational Givens define the approach and are not open for change. Basically, Foundational Givens are keys in defining what the program is and what it is not. On September 21st, 2001 Birgitt and Ward Williams invited the first group of graduating GC Trainers and all graduating GC Trainers in subsequent years, to participate in a Genuine Contact Organization within the theme of developing the approach within the following five Foundational Givens listed below.

In 2006 the GC Co-Owners Group Ltd. was formed and additional Operating Givens of the GC Co-Owners Group Ltd. have been developed over time and are open for review and change by all members of the organization. The Operating Givens are available in the Co-Owners Space online (ask Program Director for access). Foundational givens are not open for change.

#### **Foundational Givens:**

1. The 5 foundational beliefs as noted above.
2. There are 11 components of the Genuine Contact™ program as noted above.
3. Requirement to provide the Workbooks developed by Birgitt and Ward Williams when a GC Training is offered.
4. Limited givens, maximum choice and participation.
5. Limited external consultant involvement with maximum skill and capacity building.

The overall goal is to have the Genuine Contact™ approach and program make a life nurturing difference in the world.