

We Used to Dread Our Annual Retreats

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Inviting John Engle to introduce Open Space Technology to Shimer College helped the College transform its culture for the better. Shimer is an extremely small liberal arts college just north of Chicago. It is unusual in a number of ways. In addition to being unusually small – there are fewer than 150 students – it features an unusual academic program, one based on the study of original sources, and its commitment to small discussion classes is unusually strong: There are no lectures, and no class has more than twelve students.

Three years ago, we invited John to facilitate one of our annual retreats using Open Space Technology. Not only did that experience improve the way we look at and use our retreats, but it pushed us to experiment with Open Space in other areas. The most important of these is our faculty meetings. Though these are still a work in progress, we already agree that they are functioning well. Furthermore, the transition to Open Space provided a fertile occasion for shared reflection on our processes – both on what we like about them and what we do not.

We used to dread our annual retreats. Complaining about them in the days leading up to them and during the retreats themselves was part of our culture. This was ironic. We like working with each other, and our retreats bring us together for two days at the end of the summer when we haven't seen one another for awhile. One would have thought that these days would give us something to look forward to – a chance to chat, to catch up, to start planning the academic year to come.

Instead, we found ourselves locked in our seats after short get-to-know-you games, games we were asked to play despite the fact that most of us know one another rather well. A fixed agenda, as well-thought-out as it might have been, left many of us feeling as though we were assigned an obligation we had not chosen for ourselves. This too is ironic, because a characteristic that members of our staff share is that we work at Shimer College because we like and admire it. Long hours and low salaries ensure that those who don't like Shimer don't stay for very long.

I had a couple of years' experience working with John Engle in Haiti and elsewhere, so the solution was clear enough. We could convert these two-day meetings into Open Space gatherings. Our single reservation – that the format might do more for shared reflection than for the kind of clear planning that makes follow-up easy – would be easy enough to manage: We would record the results of those small-group discussions that produced action plans, and invite interested individuals to take responsibility for implementation. Those individuals would be asked for updates throughout the school year.

So we invited John to facilitate one retreat, and it worked beautifully. Open Space invited us to take for ourselves the freedom to determine what we wanted to use our retreat to work on, and we immediately found we had a lot to talk about and a lot we wanted to accomplish together. John's work at our first Open Space retreat was easy to follow and, therefore, easy to imitate. We have been leading our own retreats ever since. We let one member of the staff take substantial responsibility for requesting and collecting reports from those of use who had used small group discussions to plan particular actions, so we have a good ongoing sense of what we have accomplished and what we have left to do. Many of us now look forward to the retreats as a productive and interesting couple of days each August.

Thinking, then, that one couldn't have too much of a good thing, we decided to introduce Open Space to another area of our community's work: faculty meetings. These occur every three to four weeks through the school year. They were not as much a source of unhappiness as the retreats were. On the whole, they had been going fairly well, for a number of good reasons. First, we are a very small faculty – there are only about fifteen members – and we generally enjoy working together. Second, we are not divided into departments, but are a single unit, so there are no natural factions among us. Third, our salary structure is rigid enough that we don't especially have individual interests to defend, either.

Even so, we felt that replacing agendas fixed by our Dean's Office with Open Space Technology would enliven our group just as it had freed us to invest ourselves more fully in the work of the retreat.

Introducing Open Space into our faculty meetings presented some problems. First of all, the meetings are short – when we started the process they were just two hours long – and the first hour of each meeting is committed to an activity that would not work in Open Space. We spend that hour taking turns mentioning students who are having trouble in our classes. We ask for reports from other teachers who have the same students and for advice. Much of our success at working with our students depends on what we do in this hour, and it can only work effectively if we all attend, because we never know in advance what students other teachers will want to mention. In addition, we have felt that participating in these conversations is an important form of faculty development. We were not, therefore willing to give this time up. That meant, however, that our Open Space segment could only last an hour.

Nevertheless, we dove in. We posted a board in the Dean's Office starting a few days before each meeting so that faculty members could begin proposing topics for discussion in advance. That way, we would not need to spend much of the short hour that we had proposing topics for small-group work. We could squeeze in two sessions, though a topic needing more discussion could comfortably take up the full hour. Though we needed to continue to insist on full attendance for the discussion of students, we made the Law of Two Feet the rule for the remainder of the meeting. Those stayed who wanted to stay. We would assume that each of us could decide how best to use our time.

The first problem we encountered was the lack of time. Our discussion of students was scheduled for roughly an hour, but could be unpredictable. Those of us anxious to reserve as much time as possible for the Open Space portion of our meeting could tend to get edgy, impatient. Even to schedule two half-hour sessions was hard because it would take some time to get the sessions organized. The fact that some of us are talkers – just as one would expect in a group of teachers – didn't help. When one colleague suggested that we add a half an hour to the meetings, things improved dramatically.

The next problem we ran into was how to adapt our formal decision making process to Open Space. Our faculty is, as a body, responsible for various aspects of life at Shimer. Meetings are not just conversations. There are formal proposals and votes as well. The first means of handling formal proposals that occurred to us was the simplest. A formal proposal would arise the same way any other topic would. In order to pass, more than half the faculty would have to vote in favor. As long as enough of us chose to come to a session and then vote in favor of the proposal, the proposal passed.

This solution was unsatisfactory for two reasons. On one hand, proposals are sometimes amended. The proposal finally voted on might be quite different from the one that was put forward during our Open Space market place. Some faculty members felt uncomfortable with the notion that the faculty they are a part of could pass a resolution that they had not had the chance to consider. At the same time, they did not want all sessions at which formal proposals were to be discussed to become *de facto* plenary sessions. They felt that, if our meetings were to be Open Space, then formal proposals would have to be published in advance.

On the other hand, crucial resolutions in the history of our college had been made by small numbers of faculty members, with most faculty members abstaining. Though we did not want it to become possible for any small group to be entitled to make a decision on behalf of the faculty, it nevertheless seemed important to retain a mechanism through which minority proposals that had no significant opposition could be passed.

Our first modifications of the Open Space format addressed these problems. We agreed that small groups would only have the power to pass resolutions on behalf of the faculty if those resolutions were published in advance and over one-half of the faculty voted in favor. But we also agreed that one-third of the faculty could call a plenary session by simply informing the Dean, who is our chair. In those plenary sessions, proposals could be passed with amendments and by a simple majority of votes. We agreed that we would try this somewhat-complicated scheme for a year, and then evaluate it in a plenary session of the faculty.

The basic functions of the faculty worked well enough under the scheme. The extra half-hour we added enabled us to relax through our discussion of students. Implementation of Open Space Technology encouraged a wider range of faculty members to suggest topics for discussion, and those discussions were helpful – even if they seemed short. The scheme we developed for formal decision-making kept the formal business of the faculty moving along on schedule, and the power we gave ourselves to call plenary sessions enabled us to feel as though our full attention to the most important questions would be guaranteed.

At the same time, since most of the time after our initial discussion of students was in Open Space, the Law of Two Feet applied. We thus felt free to choose which discussions we wanted to be part of, indeed to choose whether we wanted to stay for the second half of the meeting at all. Those of us who stayed were there because we wanted to be there, and that made meetings more pleasant. The knowledge that one could leave if one wanted to makes things feel nicer even if one chooses to stay.

At the end of our year of experimentation, we held the agreed-upon evaluative discussion. On the whole, most of us believed that the system was working well enough. Some of us, however, expressed an important reservation. Some of us had the sense that, in order to emphasize individual autonomy and responsibility, we had sacrificed faculty solidarity. Those of us voting on faculty business were unsatisfied with the knowledge that those who chose to leave the meeting had chosen to accept our decisions. Since all of our decisions were taken as the opinion of the faculty as a whole, we wanted to feel as though our reflections had been heard by all those whom we would be representing. In a sense, this problem was solving itself. In accordance with our scheme, this was leading to increasing numbers of plenary sessions.

In addition, as the year went on, fewer and fewer faculty members were proposing topics for discussion. Attendance at non-plenary sessions was getting worse. We felt that this had less to do with lack of interest than it had to do with the range of demands that are made on faculty members at our small school. We feel busy, and the chance

to shave an hour off a commitment seemed hard to refuse – even when we understood the topics of discussion to be important. We all had the sense that part of us wanted to stay for the meetings, that part of us thought we should, but that it was too easy not to when more seemingly-pressing duties presented themselves.

We therefore decided to modify the Law of Two Feet. Though no member of the faculty would be required to attend any particular non-plenary session, we would all require ourselves to participate in the full 2 _ hour meeting. If no proposed session appealed to us, we would be responsible for suggested a topic of our own.

We will implement this change starting I the fall, so we do not know what effect it will have. The discussions that have led to it, however, have been among the most interesting and illuminating discussions we have held. To discover and express how much we value solidarity was an enormous step. How we will balance that need with the desire to develop individual responsibility and initiative will continue to be an experiment. But it is one that it proving profitable even well before its final results are in.