



Creating Participatory Events

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Table of Contents

1.	Executive Summary	3
2.	What Is the Problem, and What Is the Opportunity?	5
3.	What Does It Take to Make an Event “Participatory”?	7
4.	Organizing a Participant-Driven, Collaborative Event	8
5.	Case Study: Organizing and Facilitating the iSummit Open Education Track	13
6.	Summary	20
7.	Credits and Acknowledgements	21
8.	Additional References	22

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1. Executive Summary

The internet era has ushered in a broad new panorama of collaborative tools and interaction opportunities in the virtual realm. But live “offline” events such as conferences, given their unique potential for connecting like minds and catalysing relationships, have remained relatively non-collaborative affairs, employing dichotomous formats such as “keynotes”, slideware presentations, and panels to let one or several speakers relate across a veritable moat to silent and largely passive audiences. “Participatory event” refers to a gathering where participants shape the agenda before and during the event, instead of reading a fixed schedule beforehand and then shuffling between sessions that have been slotted weeks or months in advance. The focus in such events is placed on peer-to-peer knowledge sharing and network building instead of large group listening.

An event can be made participatory through an well-defined sequence of steps. First, a vision must be cast, identifying event goals and outcomes that will tap the passion and needs of participants and draw them into participation. This is followed by an iterative outreach process, speaking to prospective participants, communicating the event vision and evolving it based on their feedback. Through the outreach process, one also identifies facilitators in the group: participants with an inclination towards sharing knowledge and supporting their peers. As the gathering is convened, organizers take care to review and stay focused on event goals while conveying a fun and festive tone, to get everyone's voice active in the dialogue as quickly as possible, and to let those voices guide the course of the event. Listening to participant feedback on how the event is meeting their needs is critical, as is reflecting those inputs as much as possible in enhancing, pruning, and resequencing discussions. Through the course of the event, progress is tracked against desired outcomes and goals are refined based on that progress, steering towards demonstrable milestones and follow-up plans by the end of the in-person meeting.

Agendas for participant-driven events function more like scaffolding than script; they provide structure onto which participants can attach their ideas, interests and goals before and during the event. But letting participants drive the agenda requires a fundamental set of expectations and guidelines to encourage co-equal behaviour; at the heart of such guidelines are three tenets of peer interaction: respect, listening, and inclusion. Facilitation in participatory gatherings is the art of doing less. Success is indicated by drawing out collective energy when participants meet as a large group, and then providing guidance to establish small, focused groups of collaboration and interaction where participants drive. Facilitation roles should be distributed, tapping participants who understand the community dynamics in play, and who strive to see the needs of fellow participants served. Not to be overlooked in participatory events is the essential nature of “little logistics”; keep things cosy, comfortable and well-fuelled and the participants will carry the proceedings forward from there. Also know the risks of operating in an environment of less structure and more real-time improvisation, for there is indeed the potential for things to go less than well. But in the end, organizers of participatory events learn to trust their judgement, and make decisions based on sustaining a friendly, collaborative environment.

To help translate these general guidelines into concrete examples, this paper includes a case study based on organizing and facilitating the Open Education Track at the 2007 iSummit. Starting from goal-setting and pre-event engagement of prospective participants, the case study details how participatory principles were translated into an agenda, describing the role of both facilitators and technology. Different processes and session formats are explained and compared in terms of benefits to participants. Challenges faced in delivering the event are enumerated and solutions described. And outcomes and post-event collaboration are described in the context of sustaining post-event momentum.

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Participatory event design and delivery is a work in progress. The tradition of user-driven events goes back decades and generations, but the uptake of non-traditional agenda models in the NGO sector has been slow and uneven over the past decade. Much work remains to be done in educating stakeholders about the potential for alternative event formats, and in creating a larger community of practice among those who organize and facilitate participatory events.

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2. What Is the Problem, and What Is the Opportunity?

The internet era has ushered in a broad new panorama of collaborative tools and interaction opportunities. Asynchronous collaboration over email, the web and other channels serves as bedrock in open source software communities and user-supplied content sites like Wikipedia. But even as remote participation in projects continues to evolve and expand, live, in-person convenings still hold a unique and essential place in the knitted fabric of community and collaboration. The trust and familiarity engendered by “face time” are unique and lasting, more visceral and immediate; relationships forged or strengthened in person are cut from a fundamentally different cloth than those existing exclusively on-line.

But given their unique potential for connecting like minds and catalysing relationships, live events are frequently non-collaborative affairs, employing dichotomous formats such as “keynotes”, slideware presentations, and panels to let one or several speakers relate across a veritable moat to silent and largely passive audiences. “Expertness” is rewarded with control over submissive listeners, rather than placed in a position to more interactively address and service the needs of participants. Chat rooms and other participant “back channels” further dissipate the live energy, as attendees focus on glowing laptop screens and the time-honoured art of multitasking. Surprise and serendipity are often lacking in such sessions, more often taking place “in the hallways” between workshops.

“Participatory events” refer to gatherings where many of the above norms are inverted, with the aim to maximize participant interaction during sessions and drive richer, more sustainable event outcomes. Participants shape the agenda before and during such events, instead of reading a fixed schedule beforehand and then shuffling between sessions that have been slotted weeks or months in advance. The distinction between “participant” and “speaker” or “expert” is thoroughly blurred, with focus placed on peer-to-peer knowledge sharing instead of large group listening.

The underlying philosophy that drives such events centres on an alternate vision of how community and capacity building occur. Traditional events generally employ didactic formats that mirror scholastic experiences; teacher/class differentials are the norm and session formats too often take a “one size fits all” approach to audience needs and interests. Part of the value in participatory events lies in parallelism, as smaller groups of participants do focused peer transfer of knowledge, ideas, and issues. Such sessions provide opportunities to identify and discuss shared needs, and engender motivation to pay attention.

Participatory event organizing is founded on the premise that fully-engaged, fully-present participants catalyse stronger, more sustainable post-event collaboration and relationships. Given “control of their destiny”, attendees steer session content directly at their needs and passions. A guiding truth in participatory events is that organizers don't always know what will come out the other side, other than strengthened communities of practice.

In this new era of distributed collaboration, in-person events are costly and time-intensive when compared to various forms of on-line meetings. But the benefits of live convening can be powerful and generate long-lasting return on investment at key points in the evolution of a project or community. At times when identity and vision are being forged, when trust relationships are being catalysed to sustain ongoing cooperation, there is no substitute for face-to-face collaboration and socializing. Such milestones include the definition of a project, an initial or formative meeting for a community of practice, or watershed moments when collective reflection or reframing are required

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as a next step. In these situations, in-person meetings catalyse and strengthen connections between otherwise distributed collaborators and stakeholders, and establish the foundations of group identity. And when such convenings do transpire, participatory formats provide substantial benefit over traditional panel-and-presentation agendas, because they allow a much higher percentage of participants to contribute, establish roles in the community, and find allies and collaborators.

The participatory values described above are manifested in a number of event movements and facilitation practices, among them “unconferences”¹, BarCamps², and Open Space Technology³. This paper focuses on the Aspiration approach⁴ to participatory events, which steers a middle path between fully structured and largely unstructured models for event design and realization.

1 <http://en.wikipedia.org/wiki/Unconference>

2 <http://www.barcamp.org>

3 http://en.wikipedia.org/wiki/Open_Space_Technology

4 <http://facilitation.aspirationtech.org>

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3. What Does It Take to Make an Event “Participatory”?

There is an often-followed sequence of steps in creating a successful participatory event:

- *Cast a vision:* Identify event goals and outcomes that will tap the passion and needs of participants; work over time to “tease out the mandate” from the target audience.
- *Spread the word:* Reach out to prospective participants, communicating the event vision and evolving it based on their feedback. A fundamental question to pose in shaping a collaborative event is “what will make it worth your time to be there?”
- *Share ownership of the event:* Create pre-event opportunities for participants to communicate with each other and collectively build the agenda. Give public credit to contributors early and often.
- *Find facilitators in the group:* Identify participants with an inclination towards facilitation and supporting their peers; this is often communicated through strong sharing ethics. Ideally all participants will have some facilitative responsibility during the event, but approximately 20% of the group will need to be encouraged to take facilitation leadership. Engage each facilitator in shaping specific parts of the agenda and goals.
- *Convene the gathering:* bring participants together in time and space, taking care to review and stay focused on event goals while conveying a fun and festive tone. Get everyone's voice active in the dialogue as quickly as possible, and let those voices guide the course of the event. Balance structured and unstructured time, and use intuition in equal measure with timekeeping to pace the proceedings.
- *Evolve the agenda:* Listen to participant feedback on how the event is meeting their needs, and reflect those inputs as much as possible in enhancing, pruning, and resequencing discussions.
- *Aim for coherent closure:* Through the course of the event, track progress against desired outcomes and work to refine goals based on that progress, steering towards demonstrable milestones and follow-up plans by the end of the in-person meeting.
- *Facilitate follow-up:* collaborative live events can catalyse plans for projects and follow-up, but post-event reality often intervenes in the form of overflowing in boxes and other externalities. Using mailing lists and other on-line venues to narrate post-event progress while inviting others to share outcomes can sustain the group ethos and collaboration.

The rest of this document elaborates on the steps above, and concludes with a case study based on the Open Education Track at the 2007 iSummit in Dubrovnik, Croatia.

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4. Organizing a Participant-Driven, Collaborative Event

Successful realization of participant-driven events comes down to striking the balance between yielding substantial control of proceedings while maintaining quality of experience for all participants. Traditional event organizers feel the imperative and burden to “deliver” quality to attendees, rather than letting it emerge from within the participant community. Agendas are carefully choreographed streams of keynotes, panels and presentations delivered to identically match the pre-published agenda, and the role of most participants is minimal and passive.

Build From a Solid But Flexible Frame

Agendas for participant-driven events function more like scaffolding than script; they provide structure onto which participants can attach their ideas, interests and goals before and during the event. These agendas start from a narrative of goals; for a three-day event, the initial narrative can be as simple as:

On the first day, we'll get acquainted, review preliminary agenda and refine event goals, map out what discussions and collaborations need to happen, and start the dialogue. On day two, we'll drill down to address specific needs, passions and curiosities of the group, tracking our goals and documenting the proceedings. On the third day, we'll move towards outcomes and discuss next steps moving forward from the event.

Successful facilitation of such events involves understanding participant motivations and focusing energy and priority on those that are constructive. A simple but useful generalization is to model participant behaviour in terms of “community instincts” versus “control instincts”. Some participants intrinsically want to serve the best interests of the group, trying to let all voices be heard and keeping the dialogue on track towards stated goals; others have a vested interest in advancing an agenda or steering conversations to their own end. By letting individuals with community-building motivations facilitate discussions, and discouraging control-oriented behaviour both explicitly and implicitly, a comfortable and collaborative ethos emerges.

Subvert the Status-Quo

Another core trait of participatory events involves upsetting physical and spatial norms: when put in unfamiliar contexts participants pay more attention and are more invested in the proceedings. Two very different aspects in this regard are the physical layout of meetings spaces, and the role of “expertise” in the proceedings. In traditional conferences, room layouts usually “face the front”, with rows of chairs and possibly tables. Most participants spend sessions staring at the back of other participants' heads while facing only one or several speakers. Seating participants in circles provides substantial enhancement of experience; participants all face each other as they speak, increasing the transfer of human energy. Non-normal is a good and powerful ingredient in participatory formats.

With regard to expertise, the fundamental shift is from celebration of expertise to employment of experience and wisdom. “Experts” and “stars” who sit on panels and deliver keynotes usually play out rote roles, re-employing slideware decks and speaking at, not with, audience participants; they stand apart from the rest of the room, only occasionally hitting directly on audience needs and interests or genuinely engaging on a human level. In participatory formats, these experts are shifted from speakers to listeners, encouraged to focus on what other participants are seeking to

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learn or achieve, and to talk primarily in response to questions and in an effort to grow the understanding and capacity of the group. A beautiful consequence of this model is that the “experts” often enjoy substantial new learnings as they articulate their knowledge and experience in new and creative fashions.

It is important note that some participants will feel uncomfortable in these unfamiliar settings. Sitting in circular arrangements, not able to hide behind laptops, divorced from conventional “expertise hierarchies” and unsure what comes next, these participants should be supported and engaged. This is best done by acknowledging the “newness” of the process, explaining how the agenda will play out, and strongly encouraging questions and inviting concerns to be shared at any time. Encourage trust in the process. Often the most sceptical and initially disoriented participants can be converted into the most passionate contributors with proper support and guidance.

Interact on Planes of Peer Respect and Equality

Letting participants actively drive the agenda requires establishing a fundamental set of expectations and guidelines to encourage co-equal behaviour. At the heart of such guidelines are three tenets of peer interaction: respect, listening, and inclusion. Respect manifests in several forms: not speaking while others are speaking, honouring the schedule of the event so that collaboration flows smoothly, and acknowledging the diverse backgrounds and needs of other participants. Active listening is the art of hearing and comprehending what others are trying to say and realize, rather than waiting impatiently for a turn to speak. And inclusion is both about seeing that all participants get to speak and weigh in, while making sure that the language of the discourse is accessible to all and that questions are encouraged and honoured.

A critical expectation to convey at is that all participants must participate full-time; individuals who “parachute in” part-time, or take a session off to do “real work”, undermine the collaborative momentum and co-equal ethic.

Guide Rather than Direct

Group facilitation in participatory gatherings is the art of doing less. Success is indicated by drawing out collective energy when participants meet as a large group, and then providing guidance to establish small, focused groups of collaboration and interaction where participants drive.

Three essential threads of responsibility underpin such facilitation: sustaining the narrative of the event, capturing proceedings, and tracking the mood and behaviour of participants. Narrative is required on complementary levels: first to track the overall arc of the agenda, and correlate it to progress against stated goals whenever the group meets as a whole, and second to make sure outcomes from each small-group session are reported back to the larger group so that an overall sense of community awareness is maintained. Because session content is not pre-authored, note-taking and capture of session outcomes takes on heightened importance, and assuring conversations are recorded and saved is an ongoing challenge. Mood-watching is both about sensing the overall group tone—and adapting the pace and focus of the event accordingly—while also identifying individuals who are working against the event goals by failing to respect participant guidelines.

Thus the role of lead facilitators in a participatory event is to monitor and shape the group energy,

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guiding the agenda flow by applying small but tactical interventions where they are needed, while also making sure that documentation processes are followed.

Follow the Emergent Leaders

In each participatory event, a subset of participants quickly and steadily emerge as committed to seeing the format and the convening succeed. These are individuals who understand the community dynamics in play, and strive to see the needs of fellow participants served. This can be through offering to facilitate sessions that have been requested, by mediating and de-escalating disagreements and tensions, or by communicating to event organizers concerns or feedback they have observed. Put in the vernacular, these emergent leaders are the participants who most readily and passionately “bring the love” to the group as a whole. They are leaders in the cohort by example.

It is in delegating facilitation opportunities and other strategic tasks to these emergent leaders that participatory events take on a truly decentralized feel. Essential in delegating facilitation responsibilities is providing and explaining facilitator guidelines⁵. These instructions codify that which is implicit in facilitative instincts: make sure all participants are treated equally, include everyone in the dialogue, and keep discussions on track and free from unproductive debate.

These facilitators form an essential “middle level” in the event structure, helping event organizers to realize their goals by addressing the needs of participants. They become the “eyes and ears” of the event, listening to feedback, tracking the mood in their small groups, and helping to propagate awareness of interpersonal dynamics that are shaping the tone and outcomes of the gathering.

Use Tools Sparingly But Effectively

Technology holds a significant but not large place in participatory events; a basic mailing list and a collaborative “wiki”⁶ web site will usually suffice to support participatory formats. Pre-event communication using email and web is critical for establishing shared understanding of goals and vision. At the event, the wiki—a web site where anyone can edit any page—serves as the central repository for event proceedings, agenda ideas, and other peer-shared resources.

At the same time, some technologies, such as chat channels, are to be discouraged. Such technologies create distractions which suck energy from the room and fragment the group into those who are “fully present” and those who are more focused on virtual spaces. In general, participants should be discouraged from using laptops during sessions unless they are taking notes for the wiki or otherwise playing a role in the actual agenda.

Keep Things Cosy, Comfortable and Well-Fuelled

Not to be overlooked in participatory events is the essential nature of “little logistics”. Meeting rooms should be well-lit and comfortable, with adequate space for participants to sit in a single large circle, and good sound dynamics to assure that even the most soft-spoken individuals are heard. Proper name tags that emphasize first names and de-emphasize last names, titles and affiliations are a powerful lubricant for ad-hoc interactions. And food sourcing is critical: good food (with particular care to individual dietary needs) leads to productive moods, and an ongoing supply

5 http://facilitation.aspirationtech.org/index.php/Facilitation:Facilitator_Guidelines

6 <http://en.wikipedia.org/wiki/Wiki>

of beverages that includes a bottomless pot of coffee keeps people fuelled, hydrated and ready to fully focus on the proceedings.

Breaks should be frequent and not short, both to allow freestyle interactions, and to let participants check in with external realities so they can turn full attention to subsequent sessions.

What Can Go Wrong?

While participatory events can yield a bounty of substantial and serendipitous outcomes, the model is not without risk. Operating in an environment of less structure and more real-time improvisation, there is always the potential for things to go less than well.

Perhaps the greatest risk to successful event delivery is the establishment of poorly-defined or overly ambitious goals for the convening; participatory agendas are designed to achieve stated outcomes, and poorly conceived goals lead to fragmented and frustrating agendas. Event goals should be concrete and phrased in language accessible to all participants; desired outcomes should be achievable in the time frame of the event, and should avoid being couched in “vision” terms. For example, declaring the goal of an event to be “Ending World Hunger” is no goal at all, it is a vision in which an event could potentially have a role, but offers little or nothing in terms of how the event might actually play out. But phrasing an event goal as “Each participant should leave with concrete ideas and action items on how they can have a positive impact on the world hunger situation” is more concrete, more believable, and certainly more achievable. Such a goal also informs how the agenda might play out; organizers could schedule sessions where facilitators discuss what others are doing to address the issue, or where participants share ideas on how they might get involved.

A second critical risk factor is “over facilitation”. Participatory events succeed by letting participants collaborate; if facilitators spend too much time talking, or prioritize process over productivity, the group experience suffers. Too often, event organizers feel pressure to “deliver” an experience, but participatory events thrive when participants create their own experiences within a well-defined framework of participation. A specific challenge lies in not rushing the schedule; collaboration evolves along its own time line, and facilitators who rush participants in order to track to stated agenda time slots undermine the effectiveness of the sessions themselves. Event organizers and facilitators should trust the process, and position themselves to be effective through understated but attentive support of the participants' needs.

Another critical ingredient in participatory events is a strong cadre of experienced facilitators. While participants should be free to collaborate as they desire, leadership is still required to keep conversations and collaborations coherent and tracking towards goals. The exact number of required facilitators varies based on a range of factors at each event, but a useful rule of thumb is that there should be one knowledgeable facilitator for each 6 to 8 participants. Knowing who these facilitators are before the event starts, and melding their efforts with those of the “emergent leaders” discussed above, yields an optimal “middle layer” of facilitative support and guidance.

Perhaps the hardest risk to model for is the presence of “problem participants”. Participatory events are predicated on ethics of peer sharing and co-equality, but there will always be those in attendance who do not embrace such principles, and who seek to steer the circumstances to their own ends. Two particular traits that surface in problem participants are misplaced passion and overt insecurity. The former impels individuals to talk excessively about topics close their heart, to the detriment of the larger conversation, while the latter compels those needing group validation to speak excessively or otherwise project too heavily onto the group in the hope of “making an

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impression". These situations can often be mitigated by one-on-one conversations, where a useful tack to take is to ask the participant if they are aware how their actions and participation are being viewed by others. Such a discussion format can provide opportunity to convey concerns without being confrontational or accusatory.

A variant on the problem participant is the situation of competing or oppositional participants. Depending on the subject matter and audience make-up of the event, there will always be attendees with polarized views on matters of technology, politics, philosophy, religion and other matters. Encouraging an "agreement to disagree" in such circumstances, and inviting a focus on areas of shared need and shared vision can reduce tensions, but such frictions require constant monitoring. It is a studied art to balance the needs of each individual and the best interests of the group through the course of a participatory agenda.

And not to be discounted in the list of risk factors are those that fall under the umbrella of "logistical". A bad venue can make collaboration hard, whether it's uncomfortable seats, uninviting rooms, poor sound and lighting or other factors. Bad food, bad coffee, bad weather, and bad internet access can also derail positive event momentum. Attention to the mundane details of hosting a good party can be as big a difference maker as any other factor in participatory event delivery.

In the End, Trust Your Judgement

All the above are guidelines to be utilized and applied in response to specific event conditions and desired outcomes. Participatory event design and facilitation is about using less to achieve more: believing in the power of simple dialogue and sharing, while taking care to assure that such interactions hold together along a coherent and well-managed agenda. Trust your judgement in the moment, and make decisions based on sustaining a friendly, collaborative environment.

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5. Case Study: Organizing and Facilitating the iSummit Open Education Track

All of the foregoing advices are fairly abstract. Tying such guidelines to an actual event helps to elucidate the participatory approach.

iSummit is iCommons' annual meeting of the Free Culture Movement that has grown up around the Creative Commons licensing initiatives and other efforts focused on free and open access to technology and knowledge. At the 2007 iSummit, one of the four agenda tracks was dedicated to the topic of open education. Practitioners in this nascent field are producing curricula, books and other educational resources licensed for free use, modification, and distribution. While much exciting work is being done, these innovators had never enjoyed a chance to meet as a group, identify as a community of practice, nor to share knowledge and seek support in addressing the challenges they face in pioneering an entirely new educational paradigm based on peer production of learning content.

The track is not a perfect source for a case study on participatory events, as it was not a dedicated and immersive gathering, but rather a series of sessions embedded in a larger conference. Nonetheless, the processes used to create and steer the planning and delivery serve as an excellent example of participatory event design and execution.

Setting the Stage: Getting to Goals by Engaging Participants

The Open Education Track followed the established trajectory for creating a participatory experience. The process began approximately three months before iSummit with the definition of initial goals for the convening, intended to generate feedback and ultimately tease out from participants the agenda mandate that would generate the highest levels of motivation and engagement in Dubrovnik. Organizers drafted an initial set of event goals and placed them on the iSummit wiki:

- Showcase leading open curriculum and open education initiatives
- Share cutting edge thinking and learning about peer production methods for open educational materials
- Make links between open education activists and others in the broader iCommons community, hopefully leading to synergies, collaborations and mutual support
- Map out opportunities for increased collaboration amongst people working in open education, and see if there are ways iCommons can support this collaboration over the long haul

Key participants were identified and invited to help shape the goals. That in turn led to dialogue about who else should be included in the planning and recruited to participate in the track, and a list of possible names was maintained on the wiki. Talking points were created based on the initial goals, and outreach was done by organizers and initial participants to grow the circle of planning collaboration. Regularly scheduled conference calls and a mailing list were used to sustain the dialogue and complement the wiki, which was updated to reflect evolving thinking on the track. As the goals stabilized to a point of consensus, discussion moved to session ideas, and rich fodder for a participatory agenda steadily emerged.

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Letting an Agenda Emerge from Goals and Conversations

A critical step in the planning process was to get on the phone with each identified participant and discuss both the agenda and the participatory process. On each call, the track objectives and process were explained, and questions were invited. Suggestions were taken on what to incorporate into the agenda, as well as who else should be engaged in the planning. The calls served two essential purposes: they built participant investment in the agenda while evolving the same, and they helped to identify potential session facilitators for the event itself. It is worth noting that organizers and participants were dispersed across the globe, and the Skype internet phone tool played a critical role in keeping costs low.

With two weeks to go, the agenda had stabilized into a stable set of 6 sessions, described below. It was understood that the session descriptions were somewhat general, and that participants would be invited to evolve and adapt session content at the event. A pre-event meeting on topics related to the Open Education Track was scheduled for the day before iSummit, and served as an excellent opportunity to fine-tune the agenda and further engage track facilitators on their role in supporting and guiding other participants.

Facilitating the Event

The iSummit event took place 15-17 June 2007 in the heart of Dubrovnik, Croatia. The agenda and other event proceedings are available on the iCommons web site⁷.

The Open Education Track had a dedicated room as part of the larger event venue. Open Education sessions were scheduled into the larger agenda, with one morning and one afternoon session on each of the three days of the iSummit. Proceedings were recorded on the iCommons wiki⁸.

Setting the Table: Pre-Event Meeting for Facilitation Team

The facilitation team met for a pre-day of collaboration⁹. The 10 participants who would share the bulk of the facilitation duties met both to find out about each other's work and discuss the format and content of the Open Education Track. The meeting had an explicit goal, "to build collaborative knowledge around the creation of a participatory evaluative process that enables those in the educational open content space to learn from each other". But it also had a more implicit goal: to establish a collaborative energy among those who would guide the discussions in the Open Education Track.

All of the facilitators were Open Education practitioners, and the first part of the day was spent comparing experiences. Each person described the goals of their project, as well as the biggest obstacles they had encountered. This led to discussions on lessons learned and measuring impact, and an overall realization that much was going on in the emergent Open Education arena. The second half of the day was spent discussing the agenda for the Open Education Track; sessions were refined, concerns were addressed, and new ideas were floated and evolved. An

7 <http://www.icommons.org/isummit07>

8 http://wiki.icommons.org/index.php/ISummit_Open_Education_Track

9 http://wiki.icommons.org/index.php/Pre-conference_day

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ethic of knowledge sharing pervaded the proceedings.

The pre-event meeting had several benefits that substantially enhanced the Open Education Track. First, by learning about one another's projects and visions, the facilitation team established an esprit de corps, a sense of shared identity. Second, by following processes similar to those which would be employed in the track, those with less experience in participatory formats got experience and exposure before the bulk of the track arrived. And finally, the rich and diverse quality of the conversations sparked ideas for enriching the track agenda, and planted seeds for discussion and collaboration that began to germinate over the next three days of the Open Education Track and continued beyond the event.

Setting the Tone: Opening Circle

The Open Education Track began with a session entitled *Towards an Open Future for Education*¹⁰, which served as the starting point for participants to gather together and explore vision, goals and perspectives on the subject at hand. This was done as an Opening Circle¹¹. As with many participatory events, the seating arrangement was a large circle, such that the room had no "front", and people faced each other rather than staring at the backs of others' heads. Each participant introduced themselves, where they were from, and how they were feeling, so that all voices had been heard before the agenda was really under way. Brief framing statements were made by several participants, and the agenda was reviewed. A critical step in establishing the ethos for participation was the review of participant guidelines¹², which emphasized respect for peers, inclusion of all voices in the dialogue, the importance to talking to strangers, and the ethic of prioritizing sharing over the self-focused and competitive instincts that can emerge at traditional conferences.

Immediately following the opening circle came a pair of "spectrograms"¹³, which were employed to tease out the range of opinions on transforming the traditional educational content paradigm. In this interactive exercise, a tape line was placed on the floor, spanning the room. One end was labelled "strongly agree" and the other end "strongly disagree". A "controversial" statement was then put forth, and all participants were required to position themselves along the line in accordance with their level of agreement or disagreement with the statement. The facilitator then invited participants to explain where they stood, interviewing people at different points on the line, playing opposite ends of the spectrum off one another to tease out different perspectives.

The two spectrogram statements used in the Open Education Track were:

- *Open Curricula and Free Text will revolutionize education as we know it*
- *Open curricula will never enjoy the same respect as traditionally authored curricula*

Opinions on both matters were varied and passionate, and rich interplay took place along the line¹⁴. As a final step in the participatory process, at the end of the second spectrogram, each

10 http://wiki.icommons.org/index.php/Towards_an_Open_Future_for_Education

11 http://facilitation.aspirationtech.org/index.php/Facilitation:Opening_Circle

12 <http://facilitation.aspirationtech.org/index.php/Participants:Guidelines>

13 <http://facilitation.aspirationtech.org/index.php/Facilitation:Spectrogram>

14 A full listing of perspectives voiced can be viewed at

http://wiki.icommons.org/index.php/Towards_an_Open_Future_for_Education

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person was invited to look nearby and introduce themselves to a new-found ally they had not yet met. The spectrogram served three critical purposes: first, it reinforced the notion that everyone had an active role in the proceedings and was expected to participate, second, it demonstrated there was incredible diversity of perspective and experience extant in the track, and third, it established an ethic of interacting with all participants, not just friends and colleagues.

Overall, the opening session engendered a participatory mood, and conveyed the sense that everyone present had a role in shaping the track and the outcomes.

Propagating Ideas: Peer-to-Peer Project Sharing

The second track session was the *Open Educational Project Showcase*¹⁵, which provided a fast-paced, interactive environment where project case studies were shared. A format known as “SpeedGeeking”¹⁶, loosely based on the social construct known as “speed dating”¹⁷, was employed to create high-energy and collaborative environment. Stations for each featured project were set up around the perimeter of the room, project representatives set up laptops and material, and the rest of the participants were divided into small groups that corresponded to the stations. A timer was started, and each project had 5 minutes to introduce themselves, explain key concepts, and answer questions. At the end of the 5 minutes, each participant group was rotated to the next station, and this process was repeated until all groups had been to all stations.

This participatory format had the dual benefits of exposing participants to a large number of projects in short time, while providing opportunities for peer awareness and friendship to grow within each rotating group.

Creating Room for Dialogue

The third session, *Policy, Practice, and Pragmatism*¹⁸, was a knowledge-sharing workshop which allowed participants to break into small groups and discuss topics such as licensing models, moving legacy materials towards openness, and best paths to reuse of open education materials. Participants were invited to propose additional discussions, and all threads of discourse were captured on the event wiki. The line-up of discussions was introduced at the start of the session, and participants were free to choose which dialogue to join.

Each discussion had a peer facilitator who possessed some domain knowledge on the topic at hand, but whose primary job was to steer the dialogue, keeping on topic and making sure that all voices were heard in the discussion. In addition, a volunteer note-taker in each group entered notes on a laptop for upload to the wiki in order to document the proceedings. There were no presentations or slides; facilitators framed the discussion with opening comments, and then let participants drive the session with questions and sharings. The final step in this “break-out” format was to have each group report back to the larger group their key outcomes and “ah-ha’s” for further discussion.

During this and all sessions, a set of passionate participants steadily emerged as leaders, helping

15 http://wiki.icommons.org/index.php/Open_Educational_Project_Showcase

16 <http://facilitation.aspirationtech.org/index.php/Facilitation:SpeedGeeking>

17 http://en.wikipedia.org/wiki/Speed_dating

18 http://wiki.icommons.org/index.php/Policy%2C_Practice%2C_and_Pragmatism

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with facilitation and the evolution of the agenda.

Encouraging Practical Knowledge Sharing

The *Open Education Project Clinic*¹⁹ enabled open education projects to solicit input from colleagues working on peer production, open creativity, effective sharing and other domains, in a format sometimes referred to as “peer assist”²⁰. Each project introduced a problem or challenge they were facing, and participants were then invited to break into small groups to offer input and advice on the needs of a specific project.

The sessions served not only to provide invaluable guidance, but also to drive peer learning, and ideas and observations benefited all listeners. Once again, key outcomes were reported back to the larger group.

Communicating the Emergent Shared Vision

*Propagating the Meme: Sharing Practices to Scale Open Education*²¹ explored practical ways to identify and spread processes and tactics that might help bring the open educational content movement to scale. Participants broke into small groups and discussed a range of ideas, including researching and documenting approaches that work; adapting successful techniques from open source and open culture; and organizing communities of teachers and others to grow the open education movement. Outcomes and ideas were reported back to the larger group, and they included a collaboratively-drawn picture that represented the future of open education, as well as a performance piece demonstrating migratory geese in flight to emphasize visions for increased North-South interaction in the global growth of open education.

An emphasis on creativity and visual communication engendered a range of plans, and led to discussions that continued long after the session ended.

Putting it All in Perspective: Reaching Event Closure

*Collaborating on Open Education*²² invited participants to develop a vision for improved collaboration amongst people working on open educational materials, with discussion of how best to build on the work of others. Participants considered open education ecologies, and brainstormed what could be done between iSummit 07 and iSummit 08. Working first in small groups and then as a whole, the participants in 1 hour generated a detailed action plan for work to be done over the next 12 months. Participants conveyed surprise, pride, and shared ownership over what was created.

The final chapter in the Open Education Track was a report-back to the iSummit plenary. Three participants—an educator, a researcher, and a lawyer—were invited to share their thoughts from participating in the track. Their comments touched on the benefits of the participatory model, the ways in which they enjoyed having substantial input on the agenda, and their heightened sense of open education community moving forward from the event. Then the action plan was presented to the plenary, and received with a rousing round of applause.

19 http://wiki.icommons.org/index.php/Open_Education_Project_Clinic

20 http://wikis.bellanet.org/harambee/index.php/Peer_Assist_Tips

21 http://wiki.icommons.org/index.php/Propagating_the_Meme:_Sharing_Practices_to_Scale_Open_Education

22 http://wiki.icommons.org/index.php/Collaborating_on_Open_Education

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Challenges Faced Along the Way

The most challenging aspect of running the Open Education Track was the way in which it was embedded in a larger “traditional” conference. Participatory events work best when everyone at the gathering engages on the same terms. In Dubrovnik, there was a core of 20-25 participants who attended the whole Open Education Track, and another 20-25 who drifted in and out depending on the session topic.

Part of the reason that participatory formats don't fare as well in larger event contexts is that given the choice between trying something new and challenging that requires engagement or sitting in a “regular” session where little is expected of the participant and one can multi-task on email, most people opt for the latter. Human nature gravitates to comfort, and participatory formats challenge people to engage, create and work towards outcomes. While the “part-time” participants proved distracting at times, the track still fully succeeding in catalysing a community of open education practitioners by letting them share knowledge and support each others' needs.

Within the track, there were tensions between participating projects. The Open Education movement is relatively new, and as such, the landscape is still being mapped. Projects in the track had overlapping agendas, competing initiatives, and sometimes divergent views on the space, and it was a challenge to sustain a fully collaborative environment when competitive urges were extant. To their credit, almost all participants were exhibiting truly collaborative efforts by the close of the event.

Another challenge for the track was logistical: the track was situated in a building that was several hundred meters from the primary event venue. Anyone wanting to “check out” or “drop in” on the track had to make the trek in mid-day Summer sun from the cooler confines of the main building down a very hot and busy thoroughfare to the Open Education space. In addition, that room, while spacious and nicely lit, was on a second-floor with no air conditioning, meaning that the reward for making the trek was a very hot stuffy resting place. Track participants were extremely good-natured about the facility, but it was a subject of much discussion, and the combination of the distance and the room temperature worked against drawing in a larger number of new participants.

In spite of these challenges, there was substantial benefit in having this track embedded within the iSummit; the track was able to tap and draw from the diverse, interesting and exciting group of people the iSummit convenes. Participants embraced the format and their positive energy and commitment to the topic and the process made for a very successful gathering.

Sustaining Momentum After the Event

Sustaining momentum in post-event collaboration is an unsolved problem for participatory models. The Open Education Track followed the pattern of most such events. High energy led to strong volume on the mailing list in the month after Dubrovnik, and participants shared knowledge, ideas, and appreciations. The energy sustained for approximately four weeks, at which point it began to ramp down. Current traffic on the list is low but of high quality. The event wiki, which in other events can serve as an ongoing venue for collaboration, was used after the event to prepare a summary paper²³, and has since become largely an historical document. A clear and obvious way to better sustain collaboration beyond participatory gatherings would be to find resources to

23 ???

provide on-line facilitators after events who could actively engage the network, report on outcomes, and drive visioning towards future convenings and collaborations.

There were several striking outcomes from the event. The most far-reaching and promising was the authoring of the Cape Town Declaration²⁴. A number of Open Education Track participants, along with other educators, funders, and allies, met in Cape Town in September 2007, 3 months after the iSummit. Their goal was to map out a shared understanding for the future of open education, and to render that in a written form that could be used to disseminate the vision and recruit support for the Open Education movement. What they created was a manifesto, arrived at through participatory processes that mirrored those in the Open Education Track. The Declaration conveys a vision to make learning and teaching materials available to everyone on-line, regardless of income or geographic location, encouraging teachers and students around the world to join a growing movement and use the web to share, remix and translate classroom materials to make education more accessible, effective, and flexible. As of this writing, the Declaration continues to gain momentum and support.

Another interesting post-event episode collaboration on the iCommons blog²⁵. Several participants from the Open Education Track posted reflections on their experiences, and compared them to experiences in the other tracks, which followed traditional conference structures built on slide presentations and panels. The posts asserted that the larger event would have benefited from more sessions like those in the Open Education Track, and they catalysed substantial discussion regarding the iSummit agenda; comments to the posts were largely in agreement. It was some of the most passionate post-event collaboration witnessed to date, and seems to be playing a role in re-shaping the nature of the 2008 iSummit.

While there is no deterministic way of knowing, it seems safe to assert that the participatory format of the Open Education Track at iSummit, which emphasized collaboration and relationship-building, established the foundation upon which these post-event outcomes were built.

24 <http://www.capetowndeclaration.org>

25 <http://icommons.org/articles/lets-tear-down-the-top-down-conference>

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6. Summary

Participatory events reflect the collaborative, egalitarian world that many in the NGO sector are working to realize. They represent a deconstruction of existing power hierarchies, a response to “expert culture”, and a redistribution of roles and influence in live convenings. They provide a better means to grow capacity and strengthen social networks than traditional slideware-and-panels conferences, and they are helping develop an entirely new generation of facilitative leaders. And vibrant testimonials from energized participants at participatory events underscore the hidden opportunity costs of traditional event formats.

Much remains to be done in refining the model. Better documentation on agenda development processes has to be created. There is a glaring need to grow the pool of able facilitators in these participatory methods; the success of each event rides on the abilities and resourcefulness of the “middle layer” of facilitators. And innovation is still required to sustain better post-event collaboration; technology alone will never suffice to maintain peer-to-peer momentum; the best post-event outcomes are tied to collaborative agreements forged in the course of acting out the agenda, but constructs for reaching such agreements are not well understood.

Participatory event design and delivery is indeed a work in progress. The tradition of user-driven events is longstanding, but the uptake of non-traditional agenda models in the NGO sector has been slow and uneven over the past decade. There is a need to educate stakeholders about the potential for alternative event formats, and more advocacy work must be done with “traditional” event organizers to encourage them to try alternative session and track formats. A larger community of practice among those who organize and facilitate participatory events is also needed to reduce bottlenecks in the demand for participatory facilitation.

Those who have experienced the benefits of participatory events understand the fundamental difference such events can make in strengthening social networks and building capacity within communities. Great opportunity awaits in growing that sphere of experience and knowledge.

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8. Additional References

1. Aspiration's Facilitation wiki <http://facilitation.aspirationtech.org> . The wiki contains extensive information about event design, facilitation, participant guidelines, and logistics.
2. Aspiration's Event Toolbox on Social Source Commons, <http://socialsourcecommons.org/toolkit/show/876> lists all the software tools used by the organization to support the participatory event process.

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