

# Open Space Online Using Zoom: Guide

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### 1. GENERAL IDEA

There is a real issue, an urgent one. A complex one. No one person has every answer or the very best ideas. And a group of people really care about addressing the issue, even though conflict is likely. The people have a variety of backgrounds, perspectives, and points of view.

You realize that you want some way for these people to engage fully and address the issue. Many of them may have interacted only by email or phone in the past. Some might never have met. And if they feel passionate about the issue and are willing to take responsibility for addressing it, you want to give them the opportunity to do so.

Consider Sponsoring an event with a Theme that names the issue. And invite people who are interested to gather and explore elements of the theme that interest them. An Open Space Technology event. For various reasons it may not be possible for everyone to gather in person. In that case, consider Open Space online.

Mark Sheffield and Daniel Mezick have been delivering Open Space online using Zoom since 2017. We have served about 1700 people during this time via a mix of public and private (corporate) events. We have been teaching and have decided to publish our way of doing this, free to the world, under an open source (CC-BY-SA 4.0) license. This is because we believe that open source increases innovation.

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# Open Space Online Using Zoom: Guide

Consider using this Guide and the referenced Checklist as you prepare and deliver your Open Space event online using Zoom. Even though we mention specific tools, what is important is the functions that the tools accomplish. Feel free to experiment with the tools and technologies at your disposal.

## 2. PREREQUISITES

To participate and have an excellent Open Space experience online, each person needs:

- Access to Zoom, preferably on a computer that allows viewing multiple windows simultaneously.
- A stable internet connection
- Access to the online artifacts
- Access to people who provide guidance and troubleshooting for technical issues

### Zoom

Schedule Zoom links for the main Opening and Closing circles, each of the individual meeting spaces, and one or two overflow spaces for people to use when not attending sessions.

Count on 15-30 minutes for the Opening Circle and Marketplace and 15-30 minutes for the Closing, depending on the number of Participants. Determine the number of sessions (often around 25% of the number of Participants) and time slots (at least three, at least 30-40 minutes long). Determine how many unscheduled “Hallway” or “Lounge” spaces to provide. (We usually prepare two and one gets used.)

Meetings scheduled by Pro (paid) users have unlimited duration. Meetings scheduled by Basic (free) users are limited to 40 minutes.

A 2 ½ hour online Open Space with four 30-minute session-spaces, will need Zoom links for:

- 1 (Pro) Main room for Opening and Closing Circles
- 4 (Basic) Session spaces (A, B, C, D). Each space is for all sessions that meet there
- 1 (Pro) Unscheduled “Lounge” space for ad-hoc conversations
- 6 total Zoom links\*\*

\*\* We have found it a good practice to schedule a few spare Session spaces and hide them until they become needed.

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Each Zoom account (billing contact) has one or more users (meeting scheduler contacts). Each user may have one scheduled meeting active at a time. For six concurrent Zoom meetings you need six Zoom users.

So where do you get the necessary Zoom users?

Method 1: Borrow them from friends. Remember that a user can only have one meeting active at the same time. Make sure that someone can log in as borrowed users and check or adjust meeting settings in case issues arise during the event.

Method 2: Add multiple users to your own Zoom account and schedule one of the needed meetings with each user. If there are any issues with a meeting during the event you can easily log in as that user and fix the problem.

## Artifacts

Open Space Technology artifacts include:

- Bulletin Board that becomes the Marketplace: A tabular grid with columns for times and rows for meeting spaces. Conveners post each Session at the intersection of a space and a time. We use a Google sheet that includes links to each meeting space and to each of the other artifact documents
- Session Notes: One online document for each Session – see Figure 1
- Proceedings: A compilation of the Bulletin Board, all Session Notes, Participants and Closing documents, and other artifacts that might include the event invitation, artwork related to the host organization, screen shots, etc.

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[Open Space Theme] [Event Date]

---

**Topic Name:**

**Convener Name:**

**Session Time + Space: 1A**

**Attendees** (including bumblebees):

**What are the Key Points raised / what happened?**  
Please be brief / clear / understandable / to the point - Thank you!

**My / our next step** (if applicable):

**Appointments made** (if applicable):  
Date / Time / Location

[Return to the main room](#)  
[Agenda Wall](#)

*Figure 1: Sample Session Notes created as a Google doc  
Note the links to the main room (Zoom) and Agenda Wall (Bulletin Board / Marketplace)*

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For online Open Space we add two documents:

- Participants: where Participants may introduce themselves before or during the event

**[Open Space Theme] [Event Date]**

---

*Introduce yourself to the other participants by providing your real name, what you really do, where you are located, and anything else you would like to add.*

**PARTICIPANTS**

Please introduce yourself to your colleagues in whatever way suits you

|

[Return to the main room](#)  
[Agenda Wall](#)

Figure 2: Sample Participants document created as a Google doc

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- Closing: where all Participants have an opportunity to share their reflections during the Closing Circle, in addition to sharing verbal reflections

**[Open Space Theme] [Event Date]**

---

*This is a time and place for reflecting and telling the story of the event, for anyone who would like to do so.*

**CLOSING**

**Closing Circle**

*Please write your reflections or whatever else you now want to share at the end of the meeting:*

|

[Return to the main room](#)  
[Agenda Wall](#)

Figure 3: Sample Closing document created as a Google doc

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A 2 ½ hour online Open Space with four 30-minute session-spaces will need these documents:

- 1 Bulletin Board grid with all cells protected except Session Name and Convener Name
- 1 Participants documents
- 12 Session Notes documents
- 1 Closing document
- 15 total documents\*\*

\*\* We have found it a good practice to create Session Notes documents for a few spare meeting spaces. Remember to create one Session Notes document for each time slot. Add the meeting space links to the Bulletin Board grid and include a link to each notes document. Hide the spare rows on the Bulletin Board until they are needed.

We use Google Docs for all documents except the Bulletin Board. We generate them in advance using a template that includes spaces for the Session time, meeting space, name, participants, key points, and action items. Design your template to include the kinds of information that will make the Proceedings extremely valuable for the Participants.

Include two links in the footer of each document so that Participants can easily navigate to the:

- Main room (Zoom)
- Bulletin Board

## Cohosts

In in-person Open Space events, any number of people including Participants can resolve most of the issues that may arise, including finding a certain meeting space, needing more flip charts or paper or markers for Session Notes, etc. Be sure that you have 2-3 cohosts for your online Open Space event and that the Main room host grants them Cohost permission in Zoom. Individually and as a group the cohosts:

- Can become Main room meeting host if the primary Host has connectivity issues
- Provide a quick introduction to using Zoom (muting/enabling audio and video, chatting, presenter view / gallery view, etc.) to establish a baseline of understanding about Zoom

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- Remain in the Main room to help resolve technical questions that arise – occasionally a Participant comes back with a quick question and then go off to a Session
- Copy and paste helpful information from a prepared text document into the chat - things like the link to the Bulletin Board, the Participants doc, etc.
- Manage the “engine room” so that technology does not get in the way of the experience

### 3. MEETING SPACES

For an in-person Open Space we check each meeting space to make sure it has what is needed for a successful session. For online Open Space, this means scheduling a Zoom meeting for each meeting space and configuring it properly.

We determined the number and types of meeting rooms in the Prerequisites section. Here we discuss scheduling and configuring those meetings.

As Zoom adds and changes features, these and other settings may change location. Some settings are determined by the profile of the user who schedules the meeting. Others are set directly when scheduling. Zoom applies the profile-based and meeting-based settings that are in effect when the meeting starts.

NOTE: You can change settings after a meeting has started. You might have to stop and start the meeting a gain for the new settings to take effect.

Zoom’s recent rise in popularity has also seen the emergence of “Zoom bombing,” where uninvited people join Zoom meetings and spew all sorts of audio, visual, and text garbage. Zoom has been responding by adding and requiring various security features. Sharing meeting links by social media increases the importance of applying tighter security restrictions.

#### Main Room

The Opening Circle and Closing Circle plenary gatherings happen in the Main room, and the Facilitator and a cohost remain there during Sessions to answer technical questions and chat with whoever shows up.

Scheduling and configuring the Main room meeting include:

- Scheduled by a Pro (paid) user
- Meeting password included in the link

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- DO NOT enable start without host (this link will be shared with Participants before the event; we do not want them in the room more than 30 minutes before the event)
- Enable or disable the waiting room feature that prevents anyone from joining the meeting until a host or cohost lets them in – this feature can be helpful or it can be a real annoyance – you decide and configure the setting accordingly
- Enable or disable screen sharing, annotation, audio and video upon entry, ability to chat with hosts or everyone or everyone + privately
- Save the chat automatically if you want to include the Main room chat in the Proceedings
- We always disable recording ability to increase psychological safety so that people can be more willing to say that they really believe

### Session spaces and unscheduled space

The Session spaces and unscheduled space are used off and on between the Opening Circle and the Closing Circle. You decide whether you want meetings in these spaces to be able to last more than 40 minutes. (Note: If a meeting ends before the Participants are finished, they can open its link again to start anew 40-minute instance.)

Scheduling and configuring Session spaces and unscheduled space meetings includes:

- Scheduled by a Pro (paid) or Basic (free, 40-minute limit) user
- Meeting password included in the link
- Enabled to start without host so the meeting starts when the first person arrives
- Disable the waiting room feature
- Enable or disable screen sharing, annotation, audio and video upon entry, ability to chat with hosts or everyone or everyone + privately. Since these meeting links are only shared with the Open Space participants it is generally safe to allow full collaboration.

## 4. BULLETIN BOARD & MARKETPLACE

We determined the number of sessions and other characteristics of the Bulletin board in the Prerequisites section. Here we discuss the contents and how to build the Bulletin board. After Sessions have been

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posted, the Bulletin board becomes the Marketplace where Conveners negotiate and rearrange Session places and times just like with in-person Open Space.

We have had great success building the Bulletin board as a Google sheet. Other online tools exist. We encourage you to experiment with other tools and add-ons. See the “Tools and Add-ons” section of this document for links to some of them.

	A	B	C	D	E	F
1	[Open Space Theme] [Event Date]					
2	<b>Guidelines</b> To open the Participants doc: <u>Hover over</u> "Participants" then <u>single-click</u> the doc image To enter a topic: <u>Single-click</u> an empty Topic cell and type a brief topic name To enter your name: <u>Single-click</u> the Convener cell below your topic and enter your name To view a long topic name: <u>Double-click</u> the Topic cell To go to a room: <u>Hover over</u> the room name then single-click the link To open session notes: <u>Hover</u> the notes link then single-click the doc image					
3						
4	<a href="#">Main Room</a>	Opening, Closing, and Help			<a href="#">Participants</a>	
5						
6						
7			??:?? - ??:??pm EDT	??:?? - ??:??pm EDT	??:?? - ??:??pm EDT	
8	<a href="#">Room A</a>	Topic:				
9		Convener:				
10			<a href="#">Notes</a>	<a href="#">Notes</a>	<a href="#">Notes</a>	
11						
12	<a href="#">Room B</a>	Topic:				
13		Convener:				
14			<a href="#">Notes</a>	<a href="#">Notes</a>	<a href="#">Notes</a>	
15						
16	<a href="#">Room C</a>	Topic:				
17		Convener:				
18			<a href="#">Notes</a>	<a href="#">Notes</a>	<a href="#">Notes</a>	
19						
20	<a href="#">Room D</a>	Topic:				
21		Convener:				
22			<a href="#">Notes</a>	<a href="#">Notes</a>	<a href="#">Notes</a>	
23						
48	<a href="#">Lounge</a>			<a href="#">Notes</a>		
49						
50						
54	<a href="#">Closing</a>			<a href="#">Notes</a>		
55						
56						
57						

Figure 4: Sample Bulletin Board created as a Google sheet

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Whatever tools you use, be sure that your Bulletin board provides:

- A tabular grid with columns for times and rows for meeting spaces
- A place at the intersection of each space and time for Session Name and Convener Name
- Links to all meeting spaces (including the Main room) and all documents
- Simple, easy-to-use, and navigable interface

Double-check each link to make sure that it points to the correct meeting or document.

The Resources and References section of this document shows a sample bulletin board like the ones we have been using. Note that several additional meeting spaces have been configured and their rows are hidden.

## 5. PROCEEDINGS

We discussed artifacts in the Prerequisites section. Here we discuss assembling and publishing the Proceedings document from the artifacts. This section appears before “Communicating” and “Delivering the Event” to demonstrate the importance of seriously considering the Proceedings contents before the event.

Consider having a look at the Proceedings link in the Resources and References section of this document for some ideas about what to include.

Publishing the Proceedings pdf before the following morning sends very strong signals to the participants and the wider community, especially when the sponsor sends them :

- The Open Space event was important and a valuable use of time
- The notes and proposed actions are worthy of memorializing, and many are worthy of action

Assembling the Proceedings:

- Allow sufficient time after the event for Participants to make additional contributions to the artifacts (announce several times during the closing, especially at the very end)
- Remove edit permission from all the shared artifacts so you have the latest version of each
- Begin with a shell document containing the desired formatting styles and table of contents

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- Import the artifacts in the desired sequence
- Set each Topic Name to the style that automatically appears in the table of contents
- Lightly edit the Session notes, removing extra blank lines – only to prevent widowed text at the top of an otherwise blank page
- Do NOT change any spelling or other content – leave it as the contributor(s) did
- Insert the Bulletin board:
  - Adjust row heights as necessary for smooth page breaks
  - Remove blank rows
- REMOVE all meeting and document links – those links are no longer useful
- Review the Proceedings document and add other desired content
- Export as PDF

### 6. COMMUNICATING

Before the event send a welcome email message to everyone who registers for the event. Include:

- Zoom link to the Main room along with instructions about how early they can join the meeting to check their connection, audio, and video
- Link to the Participants document
- Invite and encourage each person to introduce themselves in the Participants document
- Link to the Bulletin Board
- Guidelines for lighting, audio, joining early to check their connection, and perhaps a brief Zoom overview and reminder about muting audio and video and selecting speaker view or gallery view – and a reminder to reboot their computer shortly before the meeting to reduce conflicts with other running programs

This becomes the source “root” email message where people can return if they get lost.

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## 7. DELIVERING THE EVENT

Each online Open Space begins with people getting connected, checking out their audio and video, and getting ready to participate. We follow a sequence like this:

- Start the Main room 30 minutes in advance, as mentioned in the email message
- Grant Zoom cohost permission to each of the cohosts
- Post messages to the chat encouraging/ reminding people to contribute to the Participants document
- At the designated start time, enable your audio and video, welcome everyone, provide a brief technical overview and introduce the cohosts
- Opening Circle and Marketplace
- The Facilitator and cohosts remain in the Main room through the Sessions to answer questions and chat with anyone who happens to return there – usually someone will return to the Main room with a quick question and then go to attend a session
- The Closing is a very important part of every Open Space event. Everyone has an opportunity to offer their reflections during the Closing. In online Open Space we invite Participants to contribute their reflections in the Closing document. Entries begin appearing slowly, explode in a flurry of activity, and then taper off – like popcorn popping. When the activity subsides, it is a good time to invite people to speak additional reflections
- Before disbanding, let the Participants know how much time they have to contribute to the Proceedings, and when the Proceedings will be published

After the event, assemble the Proceedings document, save it as a PDF, and publish it as promised. Provide the Sponsor with a copy of the document or a link to it. Also provide the Sponsor with suggested text for the “Thanks for attending – here are the Proceedings!” email message. Remind the Sponsor of the earlier commitment to provide the Proceedings before the next morning.

When producing an Open Space event online, remember to adhere to the Spirit of Open Space. Honor the Principles and the Law. Resist all temptations for the technology to detract from the experience.

Have fun... and Be Prepared to Be Surprised!

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## 8. TOOLS AND ADD-ONS

A wide variety of tools are available for producing and experiencing Open Space online and more are being added regularly. We use Google sheets and Google docs since most people are familiar with how to navigate and use them.

If you plan to hold several Open Space events, consider tools that support scripting for building the artifact templates with scripts. Manually copying links tends to be tedious, time-consuming, and error prone.

Other tools include:

- Miro <https://miro.com/>
- Mural <https://www.mural.co/>
- And many more

## 9. RESOURCES AND REFERENCES

LinkedIn Post introducing Open Space Technology Using Zoom

[https://www.linkedin.com/posts/danielmezick\\_the-declaration-activity-6680938315283238912-xwRE](https://www.linkedin.com/posts/danielmezick_the-declaration-activity-6680938315283238912-xwRE)

Open Space Technology Using Zoom – Guide and Checklist

<https://openleadershipnetwork.com/onprogress/OnlineOstUsingZoom>

Open Space Technology: A User's Guide

<https://www.amazon.com/Open-Space-Technology-Users-Guide/dp/1576754766>

## ADDITIONAL INFORMATION

Mark Sheffield and Daniel Mezick created this checklist based on several years' experience producing online Open Space Technology events. These events include public events and private ones inside commercial organizations. This checklist was created in June 2020. You may contact us at:

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