

The Open Organization Workbook

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December 2017

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Contents

Preface	9
<i>Bryan Behrenshausen</i>	

Introduction	11
<i>Jim Whitehurst</i>	

Getting Started

Enacting change management at scale	14
<i>Jen Kelchner and Sam Knuth</i>	

Getting started with the exercises in this book	17
<i>Laura Hilliger</i>	

Example: Making better introductions	19
<i>Laura Hilliger</i>	

Unit 1: Transparency

Introduction: What is transparency?	23
<i>Dr. Philip A. Foster</i>	

Case study	25
<i>Author P. Byline</i>	

Case study	29
<i>Author P. Byline</i>	

Exercise	33
<i>Author P. Byline</i>	

Exercise	36
<i>Author P. Byline</i>	

Unit 2: Inclusivity

Introduction: What is inclusivity?	40
<i>Author P. Byline</i>	

Case study	42
<i>Author P. Byline</i>	
Exercise	45
<i>Author P. Byline</i>	

Unit 3: Adaptability

Introduction: What is adaptability?	49
<i>Author P. Byline</i>	
Case study	51
<i>Author P. Byline</i>	
Exercise	55
<i>Author P. Byline</i>	

Unit 4: Collaboration

Introduction: What is collaboration?	59
<i>Author P. Byline</i>	
Case study	61
<i>Author P. Byline</i>	
Exercise	65
<i>Author P. Byline</i>	

Unit 5: Community

Introduction: What is community?	69
<i>Author P. Byline</i>	
Case study	71
<i>Author P. Byline</i>	
Building community to stay on the cutting edge	75
<i>Jen Kelchner</i>	
Exercise	84
<i>Author P. Byline</i>	

Appendix

The Open Organization Definition	88
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Learn More

Additional resources	96
Get involved	97

Preface

Bryan Behrenshausen

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Bryan Behrenshausen works for Red Hat on Opensource.com, where he's been a writer and editor since 2011. In 2016, he earned his PhD in Communication from The University of North Carolina at Chapel Hill, where he studied the relationship between culture, technology, and other complicated words.

Introduction

Jim Whitehurst

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Getting Started

Enacting change management at scale

Jen Kelchner and Sam Knuth

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Getting started with the exercises in this book

Laura Hilliger

The workshop agendas curated in this book apply co-design and participatory methodologies. "Participatory" means that an exercise invites input from participants. Rather than "presenting" information, the facilitator involves participants in the educational experience to help define and solve problems, putting the power of learning in their hands.

The exercises in this book aim to be:

- **Participatory:** They engage and activate participants from the beginning, getting them moving and interacting (rather than listening and watching).
- **Purposeful:** They help participants work toward the goal of becoming more open and understanding, so our organisations can create meaningful change.
- **Productive:** They strive to be well-planned, so that participating produces concrete outcomes in the allotted time (and participants feel that time was well spent).

These methods will help you collaborate, teach, learn, and explore the five characteristics of open organizations—which are the five themes guiding this book.

Notes on facilitation

Facilitating learning with a group of people is an art. A monotone, disinterested, mentally dissociated facilitator may have a clear, concise, well crafted lesson plan, but still fail to accomplish learning objectives. Likewise, an enthusiastic and sporadic social butterfly may let loose a random stream of consciousness but change perceptions and inspire real growth and learning.

Your best bet is to assemble a team of co-facilitators who can help you shape and run the agenda. We recommend a ratio of at least one facilitator for every 20 participants.

Although our exercises address serious topics, we nevertheless encourage you not to underestimate the value of having fun when facilitating. The exercises in this book provide tips and tricks for solving potential problems, but, in the end, your own drive and passion in facilitating these exercises are the keys that will make or break your sessions.

Notes on setup

Facilitating most of these exercises comfortably requires a room that can accommodate all your participants in a circle. The ability to move chairs to create a large space or multiple groups is essential for all of the included activities.

We've presented all exercises in this book in the same format so they're easier to read and enact. To demonstrate, here's an example activity you can use in just about any scenario.

Example: Making better introductions

Laura Hilliger

EXERCISE

Time required: 10–15 minutes for up to 20 people; 20 minutes for up to 50 people

Materials necessary: A circle of chairs

Skill level: Beginner

Both leadership and team development from training and bonding exercises is contingent on creating a space that eliminates preconceived hierarchies. Any successful participatory workshop starts by shifting the power balance participants are expecting. This exercise is a great way to initiate any of the activities included in this book.

1. Before the session, move all the chairs into a circle and put a big sheet of paper labeled "Parking Lot" on the wall.
2. As people join the session welcome them and chat with your participants. Announce that you'll give everyone a few minutes to join, and allow everyone to settle into the chair of their choosing.
3. Once people have settled in, have a seat in the circle. Do not introduce yourself.
4. Say a sentence of welcome and briefly introduce the topic your workshop is covering. Do not go into detail

explaining the topic, simply explain that today is about a particular theme.

For example, you might say something like: *"Today we're going to have a critical look at diversity and inclusion. It's a complex topic, so throughout the day, if you have ideas or questions about this topic, but don't want to bring them up in the current exercise, you can add them to the Parking Lot. At the end of the session, we'll have a look at those items and begin any discussions. This is a participatory session. We'll have active discussions and debates. Be respectful of the people around you. If you are the type of person who talks a lot, try to listen more. And if you're the type of person who doesn't speak much, please speak up and share your ideas. The more you put into this session, the more successful learning experience it will be for everyone."*

5. Do not talk for more than 60 seconds!
6. Say: *"We'll start by introducing ourselves but to avoid an endless round of introductions, we're going to follow the format I'll demonstrate."*
7. Say *"Hi, my name is [name]."*
8. Say *"I'm from [city, company, team or department]."*
9. Say, *"If you really knew me, you'd know that [a fun fact about you]."*

Examples might include: "If you really knew me, you'd know that I hate raw tomatoes," or "If you really knew me, you'd know that I was born in Bolivia," or "If you really knew me, you'd know that I have two left feet and can't dance at all."

10. Once everyone has introduced themselves, explain the first exercise.

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Unit 1: Transparency

Introduction:

What is transparency?

Dr. Philip A. Foster

We hear about transparency a great deal, especially in the context of open systems. But what does "transparency" really mean?

Its literal translation is "the ability to see through something." However, in the context of open systems, transparency is the product of sharing of something in such a way that all are aware of it and can see it.

When "open" becomes a systematic, cultural approach to operating an organization, transparency becomes one of its key components. Open organizations embrace transparency because they focus on keeping information, knowledge, skills, and process out in the open for all to access. Here, "transparency" connotes an environment where the free flow of information enhances collaboration, because transparent processes tend to invite all members of the organization to participate in them.

This approach to constructing organizational culture is valuable for helping overcome biases and office politics. A decision is "transparent" when made not in a vacuum but "in the open," where everyone can contribute to the decision making process.

Transparency creates a healthy tension within the company's ecosystem. When properly engaged, transparency creates an environment where people can freely contribute, come up with better solutions, and share equally in the outcomes of those solutions. Without transparency, decisions can

appear arbitrary—even without merit. Transparency, then, ensures that organizational members receive all the information necessary for embracing the reality of each circumstance; it forces leadership to share complex issues with the broader population of the organization.

A high degree of transparency coupled with explicit communication allows members of an open organization to get behind a problem and advance the best solutions possible. Conversely, organizations that lack transparency tend to create a workforce that is helpless to affect positive and useful change in the organization.

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Case study

Author P. Byline

CASE STUDY

Organization:
Employees:
Mission:

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Review and discussion questions

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Case study

Author P. Byline

Case Study

Organization:

Employees:

Mission:

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Review and discussion questions

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Exercise

Author P. Byline

Exercise

Estimated time to complete:

Materials needed:

Skill level:

Target behaviors:

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Exercise

Author P. Byline

Exercise

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Materials needed:

Skill level:

Target behaviors:

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Unit 2: Inclusivity

Introduction: What is inclusivity?

Author P. Byline

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Case study

Author P. Byline

Case Study
Organization:
Employees:
Mission:

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Exercise

Author P. Byline

Exercise

Estimated time to complete:

Materials needed:

Skill level:

Target behaviors:

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Unit 3: Adaptability

Introduction:

What is adaptability?

Author P. Byline

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Case study

Author P. Byline

Case Study
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Mission:

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Exercise

Author P. Byline

Exercise

Estimated time to complete:

Materials needed:

Skill level:

Target behaviors:

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Unit 4: Collaboration

Introduction:

What is collaboration?

Author P. Byline

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Case study

Author P. Byline

Case Study
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Mission:

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Exercise

Author P. Byline

Exercise

Estimated time to complete:

Materials needed:

Skill level:

Target behaviors:

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Unit 5: Community

Introduction: What is community?

Author P. Byline

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Case study

Author P. Byline

Case Study

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Employees:

Mission:

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Review and discussion questions

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Building community to stay on the cutting edge

Jen Kelchner

CASE STUDY

Organization: Slalom

Employees: 4,500+

Industry: Management Consulting

Challenge: Scaling a culture of openness as the organization grows

Slalom⁵ "does open" in a fascinating way. Aaron Atkins and Shannon Heydt, who both work in talent acquisition for Slalom, sat down with me to share challenges related to scalability—and explain how recruiting and talent management play a strong part in shaping company growth.

Slalom's case is rich and illustrative. But to understand it, we must first understand scalability. Scalability is the ability of something to adapt to increasing demands. Meeting your business demands starts with your people and frameworks far before you fulfill a service or product. Scaling is also quite challenging. It can involve (literally) years of doing the hard work with a slower growth pattern and seemingly overnight an explosion of growth occurs to meet your business demands.

5 <https://www.slalom.com/>

When this explosion occurs, workflows suddenly become inefficient. Talent management struggles to keep up with onboarding, retention, coaching, development, staffing appropriately, and so on. What worked *last* quarter will no longer support the ecosystem you're facing *today*.

Scaling in the open

In open organizations, scaling requires a strong identity; successful scaling relies on who you are to carry you and your people through times of intense growth. I'm talking about your core ideas and values. And I don't mean the wall art in the break room with the really cool font that reiterates your value statement.

Instead, your organization's values, ideas, and frameworks should be heard and felt through all interactions modeled from top leadership to the new hire. They should be a living, breathing presence in the room because they are such an integral part of your organizational culture and the people that perpetuate it.

One common misconception about open organizations is that they lack structure. To the contrary: in open organizations strong, obvious structures and frameworks set the flow for the ecosystem participants desire. In open organizations, however, structures don't just allow you to run an effective and efficient organization, but also allow for the emergence self-leadership and autonomy while still meeting strategic goals.

How you address your processes, workflows, and frameworks can make or break you. But, most importantly, your communication strategy and execution will be paramount to your organizational success.

Let's take a look at how Slalom is intentionally handling the challenges of scalability within their value-driven ecosystem.

Tipping point challenges

Founded in 2001, Slalom aims to do consulting differently. It has now landed on Fortune's 100 Best Places to Work (2016). Founders wanted to do purposeful work—and to do it in a way that allowed them to maintain the ability to do great work for their clients.

This meant they had to break typical organizational frameworks and build an open culture. They've been experiencing rapid growth, and like all organizations amid waves of change, continue to experience both wins and challenges.

Slalom noted several challenges to tackle when they hit their tipping points: consistency across markets, people development, and communication. Their approach to scalability is to intentionally build a strong, sustainable ecosystem through recruiting, people development, and feedback. They quickly learned that what worked for 80 consultants doesn't apply to the more than 4,500 they now employ.

One thing that has propelled them forward is their cultural ecosystem. Slalom is intentional about who and how they hire.

What does that mean for them? For starters, it means:

- experienced hires with different perspectives and a strong competency for feedback
- talent acquisition based on relationship first (investing in getting to know a person as more than a resume)
- looking for innovation tendencies, communication skills, coachability, knowledge and self-governance competencies

Leveraging people

Talent managers at Slalom have found that some people struggle with the responsibility of guiding their own career pathways. So they placed "Learning Leaders" in every market to support continuing education and to provide guidance and empowerment for career ownership.

Slalom encourages innovation and problem solving, which leads to a merit-based promotion system. Without the confines of a "set track to follow," employees are free to fill gaps they see when they bring solutions to the table.

"We strive to create diversity for our culture," Atkins said.. "We can then use different mindsets to come together as a team and deliver the best solutions for our clients."

Feedback loops and honest conversations

When an annual culture survey revealed that communication was not keeping up with growth, Slalom took the findings seriously. Leaders took to each market to discuss and ask for shared dialog.

As a result, an incredible number of 9,000 ideas emerged from all over the country. After filtering down the ideas to trends, passions, and strategic directions, Slalom had a strong base for their organizational direction based on feedback from their employees. They asked, listened, and put feedback into action.

Slalom also upped its communication game in a world demanding digital and real-time feedback, launching a series of videos from each core leader to explain strategic objectives. By taking such a personal approach, they've closed gaps that can occur in both distributed workforces and those that have grown to a significant size. The practice uses transparency and human connection to engage employees.

Slalom has also integrated real-time feedback loops into weekly time submissions. Asking their people (in the moment) how things are going keeps the feedback fresh and real. Closing these gaps can increase retention and improve work efforts.

Growing without sacrifices

I met again with Atkins several months after hearing about these plans. We were recording episodes of my podcast, *Generation Open*⁶, on growing community⁷ and building culture⁸. And again, we hit on what Slalom feels is their single, largest challenge they face: Continuing to scale up and grow without sacrificing quality.

With goals to grow their organization at 25% annually, the reality is they hire only 4% of the people they speak to during acquisition conversations.

Why?

They don't hire for "culture fit." It's about building their community, not buying talent.

"We tend to not hire people for jobs," Atkins said. "We want to hire you for a career. Our retention is incredibly high, our turnover is very low. So it really does come back to building a trusted relationship [...] not only with our folks internally, but also externally to make sure that it all comes together in a collaborative environment."

Here are some key ways that Slalom's talent acquisition process is different:

6 <http://bit.ly/2o0zlUE>

7 <http://ldr21.com/6-scaling-without-sacrificing-quality-with-aaron-atkins/>

8 <http://ldr21.com/ep7-build-dont-buy-talent-trends/>

- They coach potential talent through the acquisition process to grow and retain quality.
- They may choose to not hire an "A-Player" but might *build* one instead, if they feel they are the right long-term fit.
- They don't hire for culture fit. Instead they focus on capabilities and skill sets.

Coaching everyone—employee or not

Interestingly enough, Slalom coaches those they *don't* hire. Slalom's leaders feel all candidates deserve to learn how they can improve on something specific (so that, in the future, they might eventually become part of their firm). So closing the interview loop with a candidate means asking the right questions:

- What kind of questions are we asking?
- What kind of coaching are we subsequently giving back to the candidate to identify that skill gap?
- How can they improve upon it, so that in the future they can eventually become part of Slalom?

Slalom believes strongly in always doing the right thing. And in that spirit, leaders at Slalom may introduce candidates to a leader, coach them, or identify various opportunities for them to improve (because you never know when the goodwill will come back to you). Growing those they don't hire is an essentially community-building gesture—whether the candidate returns at a later date to become part of their team or not.

Forget sameness

Slalom's leaders seek to build an organization that's dynamic, inclusive, and diverse—as opposed to homogenized.

"We don't want to have a team of 10 people all from the same consulting firm. We want to have people from different walks of life, different backgrounds, different ideations," Atkins told me. We don't want to be a homogenized place where everyone is the same because we can't create unique thoughts, unique structures, and unique client deliverables without unique people. We want different people because they're going to push each other to create something unique."

Atkins went on to say: "Paradigm shifts in our thought diversity and culture can be extraordinarily difficult. And it requires [...] some people raising their hand, stepping up, and taking that risk. Culture change is a fair amount of work requiring some pretty honest, difficult discussions. It takes creating space for your community to have open discourse. It's the only way to make sure everyone is moving in the right direction."

It isn't easy

Scaling isn't easy. Even with a strong ecosystem in place, one powered by clear values and vision, growth comes with a fair share of challenges.

However, investing in your ecosystem from the beginning will help lessen the growing pains. Create strong structures for your people to operate. Leverage the wealth of talent within your people. Communicate with transparency and open real-time feedback loops to smooth transitions. Remain agile, and you'll find the right sustainable business models that work for you.

Slalom offers a great example of how an open culture works to achieve the sustainability of scale. Growing our communities based on the right kinds of relationships with people and choosing to do the right thing, whether it benefits us immediately or not, creates a more inclusive and collaborative world.

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Exercise

Author P. Byline

Exercise

Estimated time to complete:

Materials needed:

Skill level:

Target behaviors:

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Appendix

The Open Organization Definition

Preamble

Openness is becoming increasingly central to the ways groups and teams of all sizes are working together to achieve shared goals. And today, the most forward-thinking organizations—whatever their missions—are embracing openness as a necessary orientation toward success. They've seen that openness can lead to:

- **Greater agility**, as members are more capable of working toward goals in unison and with shared vision;
- **Faster innovation**, as ideas from both inside and outside the organization receive more equitable consideration and rapid experimentation, and;
- **Increased engagement**, as members clearly see connections between their particular activities and an organization's overarching values, mission, and spirit.

But openness is fluid. Openness is multifaceted. Openness is contested.

While every organization is different—and therefore every example of an open organization is unique—we believe these five characteristics serve as the basic conditions for openness in most contexts:

- Transparency
- Inclusivity
- Adaptability
- Collaboration
- Community

Characteristics of an open organization

Open organizations take many shapes. Their sizes, compositions, and missions vary. But the following five characteristics are the hallmarks of any open organization.

In practice, every open organization likely exemplifies each one of these characteristics differently, and to a greater or lesser extent. Moreover, some organizations that don't consider themselves open organizations might nevertheless embrace a few of them. But truly open organizations embody them all—and they connect them in powerful and productive ways.

That fact makes explaining any one of the characteristics difficult without reference to the others.

Transparency

In open organizations, transparency reigns. As much as possible (and advisable) under applicable laws, open organizations work to make their data and other materials easily accessible to both internal and external participants; they are open for any member to review them when necessary (see also *inclusivity*). Decisions are transparent to the extent that everyone affected by them understands the processes and arguments that led to them; they are open to assessment (see also *collaboration*). Work is transparent to the extent that anyone can monitor and assess a project's progress throughout its development; it is open to observation and potential revision if necessary (see also *adaptability*). In open organizations, transparency looks like:

- Everyone working on a project or initiative has access to all pertinent materials by default.
- People willingly disclose their work, invite participation on projects before those projects are complete and/or

"final," and respond positively to request for additional details.

- People affected by decisions can access and review the processes and arguments that lead to those decisions, and they can comment on and respond to them.
- Leaders encourage others to tell stories about both their failures and their successes without fear of repercussion; associates are forthcoming about both.
- People value both success and failures for the lessons they provide.
- Goals are public and explicit, and people working on projects clearly indicate roles and responsibilities to enhance accountability.

Inclusivity

Open organizations are inclusive. They not only welcome diverse points of view but also implement specific mechanisms for inviting multiple perspectives into dialog wherever and whenever possible. Interested parties and newcomers can begin assisting the organization without seeking express permission from each of its stakeholders (see also *collaboration*). Rules and protocols for participation are clear (see also *transparency*) and operate according to vetted and common standards. In open organizations, inclusivity looks like:

- Technical channels and social norms for encouraging diverse points of view are well-established and obvious.
- Protocols and procedures for participation are clear, widely available, and acknowledged, allowing for constructive inclusion of diverse perspectives.
- The organization features multiple channels and/or methods for receiving feedback in order to accommodate people's preferences.

- Leaders regularly assess and respond to feedback they receive, and cultivate a culture that encourages frequent dialog regarding this feedback.
- Leaders are conscious of voices not present in dialog and actively seek to include or incorporate them.
- People feel a duty to voice opinions on issues relevant to their work or about which they are passionate.
- People work transparently and share materials via common standards and/or agreed-upon platforms that do not prevent others from accessing or modifying them.

Adaptability

Open organizations are flexible and resilient organizations. Organizational policies and technical apparatuses ensure that both positive and negative feedback loops have a genuine and material effect on organizational operation; participants can control and potentially alter the conditions under which they work. They report frequently and thoroughly on the outcomes of their endeavors (see also *transparency*) and suggest adjustments to collective action based on assessments of these outcomes. In this way, open organizations are fundamentally oriented toward continuous engagement and learning.

In open organizations, adaptability looks like:

- Feedback mechanisms are accessible both to members of the organization and to outside members, who can offer suggestions.
- Feedback mechanisms allow and encourage peers to assist one another without managerial oversight, if necessary.
- Leaders work to ensure that feedback loops genuinely and materially impact the ways people in the organization operate.

- Processes for collective problem solving, collaborative decision making, and continuous learning are in place, and the organization rewards both personal and team learning to reinforce a growth mindset.
- People tend to understand the context for the changes they're making or experiencing.
- People are not afraid to make mistakes, yet projects and teams are comfortable adapting their pre-existing work to project-specific contexts in order to avoid repeated failures.

Collaboration

Open organizations are communal. Shared values and purpose guide participation in open organizations, and these values—more so than arbitrary geographical locations or hierarchical positions—help determine the organization's boundaries and conditions of participation. Core values are clear, but also subject to continual revision and critique, and are instrumental in defining conditions for an organization's success or failure (see also *adaptability*). In open organizations, collaboration looks like:

- People tend to believe that working together produces better results.
- People tend to begin work collaboratively, rather than "add collaboration" after they've each completed individual components of work.
- People tend to engage partners outside their immediate teams when undertaking new projects.
- Work produced collaboratively is easily available internally for others to build upon.

- Work produced collaboratively is available externally for creators outside the organization to use in potentially unforeseen ways.
- People can discover, provide feedback on, and join work in progress easily—and are welcomed to do so.

Community

Open organizations are communal. Shared values and purpose guide participation in open organizations, and these values—more so than arbitrary geographical locations or hierarchical positions—help determine the organization's boundaries and conditions of participation. Core values are clear, but also subject to continual revision and critique, and are instrumental in defining conditions for an organization's success or failure (see also *adaptability*). In open organizations, community looks like:

- Shared values and principles that inform decision-making and assessment processes are clear and obvious to members.
- People feel equipped and empowered to make meaningful contributions to collaborative work.
- Leaders mentor others and demonstrate strong accountability to the group by modeling shared values and principles.
- People have a common language and work together to ensure that ideas do not get "lost in translation," and they are comfortable sharing their knowledge and stories to further the group's work.

Version 2.0

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*The Open Organization Ambassadors at opensource.com
github.com/open-organization-ambassadors/open-org-definition*

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Additional resources

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Our community of writers, practitioners, and ambassadors regularly exchange resources and discuss the future of work, management, and leadership. Chime in at www.redhat.com/mailman/listinfo/openorg-list.

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