The Open Organization
Guide for Educators

The Open Organization Guide for Educators

{book subtitle goes here}

with an introduction by Ben Owens

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Beth Anderson's "An open process for discovering our school's core values" originally appeared at https://opensource.com/open-organization/16/6/opening-discover-education-centers-core-values.

Heidi Ellis' "Open organizations on Mars" originally appeared at https://opensource.com/open-organization/18/1/imagining-open-communities.

Jim Whitehrust's "Open education is more than open content" originally appeared at https://opensource.com/open-organization/16/8/harnessing-power-open-education.

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Colophon

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2 https://dejavu-fonts.github.io/

3 http://overpassfont.org/

4 https://www.libreoffice.org/

Additional reading

From Jim Whitehurst

The Open Organization: Igniting Passion and Performance (Harvard Business Review Press)

Organize for Innovation: Rethinking How We Work (Opensource.com)

From the open organization community

The Open Organization Leaders Manual: A handbook for building innovative and engaged teams (Opensource.com)

The Open Organization Guide to IT Culture Change: Open Principles and Practices for a More Innovative IT Department (Opensource.com)

The Open Organization Workbook: How to build a culture of innovation in your organization (Opensource.com)

Every week, Opensource.com publishes new stories about the ways open principles help innovative leaders rethink organizational culture and design.

Visit opensource.com/open-organization to read more.

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Editors Names

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Visions

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Open education is more than open content

Jim Whitehurst

The famous playwright George Bernard Shaw once said: "If you have an apple and I have an apple and we exchange apples, then you and I will still each have one apple. But if you have an idea and I have an idea and we exchange these ideas, then each of us will have two ideas."

I love that quote, and in May 2016 I shared it with a room full of educators, administrators, and open source advocates at New York University during the Open Summit, an open conversation about education.[5] I believe it reveals something critical about the future of education and the positive role openness can play in the future, if we embrace it.

As I shared in *The Open Organization*, the nature of organizations is changing, because the nature of how we organize to create value is changing. Educational organizations are realizing this more than most, because their stock-in-trade isn't something primarily physical (like apples). It's ideas. And ideas are becoming more plentiful, not less.

How we prepare people for life in these new organizations—where an ability to innovate and produce the new is much more important than an ability to work efficiently and reproduce the same—has to change just as significantly. We need to use the power of open to rethink education.

Unfortunately, much of what I read about "open" in education applies to the sharing of educational content: the materials educators use to teach students, from lesson plans to activities to syllabi to

5 https://opensource.org/node/832

entire curricula. While sharing content is certainly valuable, I think we can do more to make education more open.

To me, what makes openness such a compelling path forward for education has less to do with specific licensing decisions and more to do with the attitude we adopt toward educational practices altogether. It’s the way we both imagine and work to build value around educational experiences (the "downstream" benefit of being open, as open source developers might say). More specifically, thinking openly changes how we *create*, *interact in*, and *sustain* educational organizations.

Creation beyond control

By default, most traditional educational organizations aren't inclined toward sharing. Just look at the ways many activities central to them—like tenure, publication, and advancement—tend to emphasize solo authors, thinkers, and inventors. In the context of higher education, we like to imagine scholars and scientists toiling away in isolation, dreaming up big ideas and releasing them to the world in brilliant form.

But we tend to forget a critical piece of the scene: The ever-present “Works Cited” or “References” pages that list every idea and innovation a scholar builds on when creating something new. Instead, educational organizations’ cultural norms push against open exchange and collaboration and reward individual careers built on singular efforts—even though this isn't how innovation occurs.

And that's more evident today than it ever has been. Take big data, for example. In this exciting new field, every major innovation has been open sourced and shared, and what's been possible has been because of developers' desire for transparency and collaboration.

Thinking of ideas as possessions individual people create and control is a relatively new historical development, of course. In the context of the industrial era, people wanted informational goods to function more like physical goods, so they invented things like copyright and patent law to make ideas work more like apples. And those inventions influence not only how we think about our creations and their value, but also how we build them.

When open education advocates focus too narrowly on content distribution, they can miss the act of *content creation*—and then risk missing ways we might change the pace and quality of the work we're doing together. Quite simply, co-creation allows better, richer, more diverse solutions and insights. It also allows us to succeed or fail faster, so we can accelerate the pace of innovation necessary today. Reforming our criteria for valuable educational contributions might help us begin rewarding an open approach to creation rather than discouraging it.

Interaction beyond prescription

When openness *does* become a default attitude, people's interactions change dramatically. Today we're enjoying the fruits of some of the largest distributed groups we've ever seen: organizations of creators and innovators spread across the entire globe. Each of them has something to teach us about the way we relate to and communicate with one another.

This is no less true for educators. But educational organizations (like public schools, to name just one kind) are still rooted strongly in certain values that emerged during an era of industrialization—where the purpose of education was preparing people to perform rote tasks repeatedly in closed organizations with little contextual perspective.

And yet, as we're seeing, the organizations that graduates join when they leave school (especially in the global West) are less and less industrial—and even the ones that are industrial are reinventing themselves for largely post-industrial activities. These organizations demand new models of both cooperation and leadership: new ways of working together, new standards for effective interaction, and new rules for distributing authority.

In the meritocracies that so frequently form inside open organizations, formal titles mean less than reputation with regard to power relationships. Leading an increasingly educated and savvy workforce involves creating context for great work rather than prescribing and specifying every detail in order to mitigate deviation. Directing is less important than catalyzing. What might happen to classrooms if we began teaching this way?

We need to think seriously about how we're educating tomorrow's organizational participants and leaders, because—for now, at least—we're emphasizing modes of interaction that are just outdated.

Sustainability beyond transmission

Thinking about educational organizations as catalysts raises one other interesting point: What happens to these organizations in an age of abundance?

This is a particularly hot topic among folks in higher education, who are beginning to realize that imagining universities as machines for the transmission of information is no longer working. Under traditional models, schools market themselves as places with the best educational "content" for students. But today—a time when we're celebrating much easier access to information—these organizations no longer have a monopoly on ideas. Many are even putting their courses online and making them available at little or no monetary cost to students. The "content" is losing its place as a key value generator.

That's prompting educational organizations to face a kind of existential crisis—one that raises difficult questions. When abundance is the default, what happens to an organization that depends on scarcity? How does its purpose change? And what happens to the revenue-generating mechanisms that allow it to persist, thrive, and grow?

These aren't easy questions, by any stretch. But they're exactly the ones that challenge us in the open source software business, where our ongoing task is to *create business models around abundance*.

Red Hat's product, for example, isn't software. The software is open source, easily accessible to others, and licensed to promote sharing. Development is community-oriented. The "content," in other words, is free and abundant.

Red Hat adds value to the open source ecosystem by leveraging abundance to create more and better abundance. We support people using the software. We contribute to communities creating new, more advanced versions of the software. We patch and secure the software. We sift through the abundance, make sense of it, and help other people leverage it effectively. That's our product (and we're very good at making it!).

As they ponder their place, role, and function in an age of relative abundance, educational organizations must find new ways to generate value from that abundance. The longer we conceive of education as an enterprise focused solely on "content," the longer we're going to miss opportunities to help those integral organizations survive.

Reimagining education today might begin with a few simple questions:

- What value do educational organizations provide?
- What is their product?
- What role can they play today?

Answers to these simple but difficult questions will differ for everyone involved. But in an age of abundance, the educational organizations that survive will be those most focused on what they can add, what they can catalyze—and how they can best harness the power of openness to change the ways they create, interact, and sustain themselves.

Jim Whitehurst is president and chief executive officer of Red Hat, the world's leading provider of open source enterprise IT products and services.

Review and discussion questions

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Case Studies

Chapter

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An open process for discovering our school's core values

Beth Anderson

When I joined The Hill Center in Durham, North Carolina, as Executive Director nearly two years ago, I realized immediately that I had joined a wonderful, successful, highly conventional education organization. Hill has been transforming students with learning differences into confident, independent learners for nearly 40 years, and many of the faculty and staff (including the outgoing Executive Director) had been at Hill for most of that time. Hill has a strong culture, and its faculty and staff all consistently deliver high-quality programs for students and teachers alike—all despite evident tensions, misunderstandings, and mistrust between senior administration, faculty, and staff as well as across different programs and teams in this rigidly siloed, hierarchical organization.

From the start, I publicly stated I wanted to address issues of culture, trust, and transparency, in part by establishing organizational core values. But I didn't know how or when to do so. And, candidly, I was scared. I knew I couldn't come into Hill and impose my own core values, yet I was petrified of what might emerge if I opened the value-creation process to everyone—and I didn't how I would respond if I simply didn't believe in, like, or want to adhere to what did.

Hill did have core values posted on its website and included in its strategic plan, but they just didn't resonate with me, and hardly anyone within the organization could articulate them. I saw both an opportunity and a challenge. Despite my public proclamation, however, I decided to wait.

The time comes

Fast forward 18 months.

I'd read *The Open Organization* (and many other articles along the way) as I tried to navigate the path forward, discover my authentic leadership and management style within this (still very foreign) context, and lead change in a non-threatening manner. I'd adopted and promoted "All Hill" language and events to help break down siloes. We'd engaged in an All Hill "strategic visioning" process that was faculty/staff-centric, rather than being led by the board, and that resulted in some new relationships, dialogue, and common language. We had hired, retired, or exited many faculty and staff, resulting in an organization that was suddenly fairly evenly split—almost exactly one third newer personnel, one third in the three-to-ten-year range, and one third employees who had been at the school more than a decade (half for more than 20 years). And we were still very, very far from being an "open organization."

So I decided it was time to embark on a core values process, and I decided to do it as collaboratively, openly, and organically as felt possible. I had no idea where it would lead or what would result. And I was still scared.

Why did I decide suddenly it was time? First, we were losing veterans to retirement each year, and I didn't want to lose their perspectives on what made Hill successful and unique—and what had made them dedicate decades of their lives to Hill. Moreover, as we welcomed the next generation of faculty and staff, we needed to be able to recruit and retain great people, and clearly communicate and deliver on "Why Hill?"

By soliciting ideas and feedback from staff, I could honor what we'd done well in the past while preparing for future transformations. Second, I knew teachers at The Hill Center often spoke positively about feeling autonomous and enabled in their classrooms, and I wanted to recreate that feeling of empowerment and involvement at an organizational level. Finally, I recognized that a sense of ownership of shared values could foster parity across staff members with varying levels of experience and authority.

When it comes to adhering to and executing on our core values, nobody is held to a higher or lower standard; consistency of values prevents favoritism or bias in decision making. Anyone should be able to ground a conversation with anyone else—regardless of position, team, or program—in shared core values without making that conversation personal. In short, by asking All Hill to collaborate on "discovering our core values," and then making the final product explicit and alive, I hoped to reinforce the greatest strengths in the pre-existing culture of The Hill Center while continuing the move towards a more open, transparent, and trustful organization.

We just needed to think about how we'd actually do it.

Discovering our core values

Along with Michelle Orvis, Hill's Chief of Staff, I began reading articles and watching videos related to open sourcing core values, and we informally interviewed personnel from other organizations to solicit their advice. In the end, we wanted a hybrid approach: something open and inclusive but not completely democratic or consensus-driven. We also did not want the process to be too time-consuming for our already busy faculty and staff. We wanted to conduct it over several months, but not forever, and we wanted to accept input in a variety of forums.

After announcing the process and sharing multimedia examples from other organizations over email, we had an optional "lunch 'n learn" kick-off (I had learned early on that the only possible window for bringing All Hill together was lunchtime, between morning and afternoon classes!). I provided some context, laid out two guiding principles for our core values—"clear and simple" and "truly authentic"—and folks worked individually, in pairs, and in small groups to describe the "essence" of Hill in words and phrases. We captured the words and phrases, then shared and discussed them via email communications, smaller informal lunches, and preliminary synthesis and discussion at a half-day leadership team retreat. During this process, we also added two more guiding principles: "Bias towards action" and "All Hill—knit together entire organization."

Following one of the informal lunch discussions, I received an email from Kate Behrenshausen, one of The Hill Center's newest teachers. The note surprised me, given that Kate had opted out of the kick-off meeting at the beginning of the process. Suddenly, she was ready not only to participate in the values-writing process, but also to engage further by collaborating on additional writing (like this book chapter!).

How had Kate made the jump from disinterested to engaged, and what could I learn from this?

Initially, Kate admitted, she did not believe the core values process would apply to her role at Hill; in fact, she admitted, she wasn't even totally sure what "core values" meant. To her, they sounded like sterile, superficial management buzzwords.

But later, when I asked Kate and her coworkers to submit five words or phrases that described the "essence" of Hill, she was intrigued. She'd received a concrete method for providing feedback, and she appreciated the implication that her opinions mattered. In fact, she said, that feeling of appreciation had guided her decision to join Hill in the first place. During an early interview, Head of School Bryan Brander had reassured her that Hill gives its teachers the freedom to do what is best for student learning. Bryan's words inspired her—especially after several years in the public school system, where decisions seemed to come from far-off offices of people who did not know her students and would never see her classroom. In her estimation, the follow-up core values activity had reinforced those feelings of reassurance, encouragement, and inclusivity.

All (Hill) in

I recently shared draft core values with All Hill at one of our bi-monthly, post-board meeting lunches. The draft was an updated version of what our leadership team synthesized from the "words" activity at the kick-off lunch, then modified to reflect the other feedback I had been collecting in formal and informal ways. We've posted them on the wall in the mailroom with markers, post-its, and dots in hopes that folks will share their reactions, ideas, questions, concerns. We'll go from there, working towards unveiling "new" core values at our August Back-to-School kick off.

What currently hangs on the wall are not the core values I'd have written myself (though many of my original themes do come through). Some of them raise questions (even concerns). And yet, on the whole, I feel better about them at this point than I might have expected, and I think they will spur more needed dialogue as we progress. I've learned three valuable lessons so far:

- Letting go can be both scary and liberating. While I certainly haven't let go completely, I haven't "backwards planned" or tried to over-engineer it, and I genuinely have listened and sought out the input of everyone. And it's been fun, engaging, stimulating, and affirming of the many great people, ideas and things happening every day at Hill—much less work for me than it could have otherwise been, too!
- "Authenticity" is a simple but challenging guiding principle, for both individuals and organizations. But to me it seems central to being an "open" leader and organization. What seems authentic to some may not to all; what is authentic in certain relationships or circumstances may not manifest itself in others. And what if there are things about "who we are" as an organization that we need to change in order to thrive and survive, or about who we think we are supposed to be that we need to actually embrace more fully rather than let go? I think we may need to have some hard conversations about authenticity as a part of this process.
- Nothing is better than actually sitting down and engaging in dialogue with different people, taking the time to talk less and listen more, and then having the discipline to capture and translate that dialogue into something that is made explicit and shared. It takes time. It takes planning. It takes effort. But it is so

> much better than just thinking about things or wishing them to be different or true.

I still have a long way to go and grow as a leader at Hill. And we still have a long way to go and grow as an organization. But the journey is one worth taking. And I am determined to enjoy and learn from the ride. Hopefully, many others feel the same—and will join Kate and me along the way.

Beth Anderson is the executive director of The Hill Center in Durham, North Carolina. The Hill Center is a private-public, K-12 model that serves students who are struggling academically—especially those with learning differences and attention challenges—and their teachers.

Review and discussion questions

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Chapter

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Review and discussion questions

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Activities

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Reflection

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Chapter (with activity)

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Performing the collaborative dilemma

Gina Likins

ACTIVITY

Estimated time to complete: 30–60 minutes

Materials needed: Two varieties of prizes, one "choice card" for every participant, a whiteboard and markers, signs that read "30 seconds" and "20 seconds"

I wanted groups to experience open source values in a very concrete, hands-on way—so I created a game called "Candy or Swag,"[6] which is based on The Prisoner's Dilemma.[7] Unlike The Prisoner's Dilemma, however, Candy or Swag tests a negotiation scenario based on reward (rather than punishment) and uses real, tangible prizes of varying value to demonstrate how collaboration and transparency can form the basis of a sound business strategy.

In this chapter, I'll explain how I run "Candy or Swag," including game setup, instructions for play, and hints for facilitation.

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6 Adapted from "Teaching the Prisoner's Dilemma More Effectively: Engaging the participants," by Michael A. McPherson and Michael L. Nieswiadomy (http://www.cas.unt.edu/~mcpherson/papers/mcpherson_nieswiadomy_jee.pdf)

7 The Prisoner's Dilemma (http://www.investopedia.com/terms/p/prisoners-dilemma.asp) is a classic exercise in game theory that explores the "competing" desires of cooperation and self-preservation. I've always been fascinated by game theory and the Prisoner's Dilemma, but found them difficult to explain to others—because they're abstract, existing in the realm of "thought experiment."

Facilitation steps

Phase 1: Preparation

STEP 1. Gather materials. For this exercise, you will need four things:

- *Prizes of two different varieties: "candy" and "swag."* Candy (or "low value" prizes) can be anything with trivial value, like individually wrapped pieces of candy (my typical choice), pennies, or stickers. To estimate quantity, assume that every participant can win a piece of candy every "round" and that you will run at least eight rounds. Swag (or "high value" prizes) doesn't have to be physical objects; it could be "two hours off," for example—but there should be a physical representation of the prize, like a coupon (I've used company-branded items that we usually give away at conferences). To estimate quantity, figure that every participant can have one piece of "swag" and have a few to spare.
- *A "choice card" for each participant*. On each card, write the name of the "low value" prize on one side, and on the reverse write the "high value" prize. I tend to use candy for the former and swag for the latter (hence the name of the exercise), but you should use whatever works best for you. Throughout this chapter, I'll use the terms "candy" and "swag" as placeholders for these two types of prizes.
- *A whiteboard and whiteboard markers or printed sheets to distribute with the payoff matrix* (see Figure 1).
- Signs (handwritten is fine) reading "30 seconds" and "20 seconds."

STEP 2. Place a choice card at each participant's desk.

Phase 2: Game Play

STEP 1. Explain the rules to participants. Here they are:

1. *No talking from this point forward. Anyone who talks gets neither candy nor swag.*
2. *You have a choice card in front of you. When I say so, pick up the card and hold it so that your choice (of candy or swag) is facing up and the other side is hidden by your hand.*
3. *I'll come around and tally your choices, so make sure to hold your card so I can see it but no one else can. If you want "candy," for example, hold the card so I can see "candy" when I come around.*
4. *Here's the twist: Whether you receive candy, swag—or nothing at all!—is based on what choices the whole group makes, based on a payoff matrix.*
5. *Here's how the payout works. Pay close attention.*

STEP 2. Explain the "Payout Matrix." I find that constructing the payoff matrix in real-time on the whiteboard (while talking it through) works best. This seems to help participants better understand the choices.

If using a whiteboard is not feasible, you can distribute printed copies of the payoff matrix. The payoff matrix is based on a "target number" of participants, which is the maximum number that can choose "swag" and ensure a scenario where everyone gets something. I usually set the number at roughly 1/10 the size of the group. For example: In a group of 20, the target number is 2, while for a group of 8, the target is 1 (as it's hard to have less than a whole person). For a group of 15, I'd use 2 as the target.

If...	Who gets CANDY	Who gets SWAG
... **everyone** chooses **candy**	**Everyone**	**No one**
... ≤ target# of participants choose **swag**	**Everyone except** the participants who chose **swag**	The participants who chose **swag**
... > target# of participants choose **swag**	**No one**	**No one**

Figure 1: The "payout matrix"

After explaining the payout matrix and taking questions, you're ready to play! (Important: Do not tell the participants how many rounds you're playing.)

Step 3. Ask the participants to choose candy or swag by holding their choice card so that you can see their choice (but no one else can).

Step 4. Count the number of participants who chose swag.

Step 5. Tell the group how many people chose swag (but not who chose swag). Explain what everyone won (if anything) using the payout matrix above, and hand out prizes.

Step 6. Run a few rounds (at least three) like this, then ask for some reflection about what the participants are noticing.

Step 7. By now the participants are usually getting a little frustrated (which is fine), so explain: "*We are going to try playing the game a little differently—in a way that's more 'open.'*"

Step 8. Review the Open Organization Definition (see Appendix) and ask the group if they think it might help if they were allowed to collaborate a little before making their decision for candy or swag. Assuming they jump on this opportunity (and I've never seen a group that hasn't), you can explain some new rules.

Step 9. Explain these new rules:

1. *You will have one minute from when I say "go" to collaborate as a group before each of you again chooses candy or swag.*
2. *I'll hold up signs telling you when you have 30 seconds left, then 20 seconds left, then count down the last ten.*
3. *All the rest of the rules are the same. Remember to choose the card for the prize you want, then hold it so that I am the only person who can see your choice.*

Step 10. Say "*Go.*"

Step 11. At 30 seconds, hold up the "30 second" card. Then, at 20 seconds, hold up the "20 second" card. At 10 seconds, begin a silent countdown using your hands held high above your head. (Note: I'm not incredibly strict with the timing. If there was clear progress, I let the time run long, for example. This step is primarily a way to ensure participants know there's not room for endless debate.)

STEP 12. As above, tally the votes for swag and explain the "payout." If at any time a participant asks how many more rounds there will be, tell them that you don't know. Run at least three rounds this way. Run more rounds if it takes them a while to get collaborating.

STEP 13. After a couple of rounds of playing the game this way, ask the group if—based on your discussions about "openness"—anyone can think of a change that would make the process even more open.

STEP 14. If the group has had people who said they'd choose candy but really chose swag in the collaboration period (what we might call "cheaters"), they'll usually come up with "transparency" on their own. Even if you haven't seen cheaters so far, though, consider proposing a hypothetical situation asking what would have happened if the group still ended up with too many swag choices and how that would have affected the outcome. (I will often use this opportunity to talk about the open source idea of "trust then verify"—or collaborating with people to find the best solution, rather than competing, but having the code be open and transparent to everyone so it's "checkable.")

STEP 15. Change the rules one more time. Now have the participants make their choices in an "open" or transparent way (for example, by placing their choice card face up on the table). This variant is especially helpful if you have groups that are unable to figure out how to effectively manage the collaboration variant of the rules.

Reflection

If your exercise runs anything like mine have, then during the first few rounds of the game more than the target number of participants will choose swag and no one will receive anything. In groups I've facilitated (which typically had about 20 participants with a target number of 2), the number of participants who chose swag each round ranged from four to eight, but it was never fewer than two (so no one won anything). When asked to reflect on what they're seeing, the participants typically identify a few issues:

- "A lot of people are greedy (i.e., want swag)."
- "There's no way to tell who is asking for what."
- "There were a lot of people who were trying to do the right thing so everyone could get candy at least."

After I've changed the rules to allow for more collaboration, however, the participants immediately figure out that if they work together they can *all* get candy every round, and they can *take turns* getting swag. Watching the discussions between the participants evolve is fascinating: even though I've just met these participants, I can tell who the leaders are. I've seen groups came up with their own variants of a "sharing protocol." For example, one group chose one person from each table in the first round, then the next person from each table during the next round, while in another group they just moved around the room clockwise. When we enter the reflection phase of the exercise, almost every group I've worked with has observed that they have fared better when everyone was collaborating.

One group was particularly illustrative. Apparently, there'd been some interpersonal drama earlier in the week and tensions in the group were high. When they first played the collaboration round, they came up with a plan—but someone "cheated"[8] (i.e., didn't stick to the agreed upon plan) and ended up causing the swag count to be "3."

So we tried it again, and the same thing happened. And again. By this point, the group had figured out who the rogue was and was becoming quite upset with him. To my utter surprise, on the next round the cheater didn't cheat. I had to laugh, though, when someone pointed out that one of the other participants had taken away his swag card!

The cheater was understandably frustrated, but I used this as an opportunity to talk about what happens in open source communities when people show they are not trustworthy or that they don't

8 I have "cheated" in quotes because in one sense he was following the best possible plan, if you were to discount altruism as a means to obtain future good.

have the community's best interests at heart. As I explained to the group, in open communities, if someone is consistently causing problems, the community will attempt to work it out with that person. But if that doesn't work, the community will often have no choice but to remove that person from the community.

The open organization values of collaboration and transparency seem like they should be easy enough to understand. But giving people the opportunity to discover how well they work through experimentation has proven far more effective than all the explaining I could do. This exercise is one way to provide that opportunity.

Gina Likins is a member of the University Outreach group, which is part of the Open Source & Standards Team at Red Hat. She's been working in internet strategy for more than 20 years, participating in online communities for nearly 25, and working in open source for more than five. She's passionate about finding ways to help our open source communities thrive and be more welcoming for everyone.

Open organizations on Mars

Heidi Ellis

EXERCISE

Estimated time to complete: 90 minutes

Materials needed: The Open Organization Maturity Model, score cards, writing utensils, notepads, and paper

Those who are new to the idea of open organizations (and open source in general) may have a difficult time envisioning how the open organization principles (see Appendix) are incorporated as part of an existing culture. Many of these folks may not be participating in—or even have had extensive exposure to—an open organization, and therefore may not have ready access to a live community from which to observe and from which to learn.

This exercise allows participants to create their own communities and then evaluate them with respect to the Open Organization Maturity Model. It is intended to allow participants to gain an understanding of how open organization principles could be implemented within a culture. The process of creating a community allows the participants to clearly understand how the community works, providing a solid foundation for the process of evaluating the community with respect to the Open Organization Maturity Model. The application of the model provides participants the opportunity to test their understanding of open organization principles by evaluating their inclusion in a known environment.

Facilitation steps

Phase 1: Imagine a new society

In this phase of the exercise, participants will collaborate in teams to imagine a new society. Divide the group into teams with an equal number of members.

Step 1. Explain the exercise's hypothetical premise to participants. Say something like: "*You are part of a team of 50 people that is going on an expedition to Mars. The team will be responsible for creating a new community on Mars including terraforming, exploring, and establishing a government. You are responsible for defining the culture and government for the new community. In this assignment, you must define a society built on open source principles. How do people act? How do people govern themselves? What kind of institutions/organizations do you build?*"

Step 2. Ask participants to imagine a system of government for their new society. Say something like: "*Describe how your community will be run. Will your society be a democracy? A monarchy? A dictatorship? A mixed government that combines elements of several systems? What kind of a constitution will you have? How will your government make decisions? Define a motto for your government. Explain your choices.*" Allow at least 10 minutes for this step.

Step 3. Ask participants to imagine a legal system for their new society. Say something like: "*Your community must have rules. Define a list of at least 10 rules all community members must follow. Provide an explanation for each rule. You will also need a legal system in order to handle those who break the rules or harm others. What sort of a system will you use? How will you address conflict resolution? How will you enforce the rules of your society?*" Allow at least 10 minutes for the step.

Step 4. Ask participants to imagine an economic system for their new society. Say something like: "*Your society's economy determines how resources (goods and services) are allocated. What systems will be in place for the production and distribution of resources? What form of currency will you use? What structure will you use for distributing resources? Does the government own all re-*

sources and means of production? Are the resources owned by private individuals? Is it a blend? How do people earn a living? What industries and careers are available?" Allow at least 10 minutes for this step.

Step 5. Ask participants to imagine various social programs their society will offer. Say something like: "*Social programs exist to ensure that all members of a community are provided for. How will your government care for the poor? How will your community be housed? What rights to community members have? What are the obligations of all community members?*" Allow at least 10 minutes for this step.

Phase 2: Evaluate the new society

In this phase of the exercise, teams of participants will evaluate each others imagined societies, specifically their relative degrees of openness.

Step 1. Explain the Open Organization Maturity Model[9] to participants. Also explain that everyone will be evaluating the values that underpin the imagined societies with respect to each of the following aspects of a culture:

- Transparency
- Inclusivity
- Adaptability
- Collaboration
- Community

Step 2. Invite a representative from one of the teams to share the details of the society they generated in the first phase of the exercise. That representative should "read out" on the team's collective work and describe all facets of the society in as much detail as the team was able to generate.

Step 3. Other teams around the room will use scorecards (see Figure 1) to "rate" the society's position on the Open Organization

9 https://opensource.com/open-organization/resources/open-org-maturity-model

Maturity Model. They should place an "X" in the space that corresponds with their estimation of the society's degree of openness.

	Transparency	Inclusivity	Adaptability	Collaboration	Community
Level 1					
Level 2					
Level 3					

Figure 1: Scorecard

Step 4. Ask participants from around the room to share the scores they allocated to the society just described. Be sure to ask participants to justify their scores by describing their perceptions of the society.

Step 5. Repeat the steps in Phase 2 until all teams have had an opportunity to report on their imagined societies.

Reflection

Levels of open organizational maturity will vary, both across the aspects of a single team's culture and across the cultures of *all* the teams. The evaluation process may engender lively discussions as participants debate how the parts of the culture map to various levels in the Open Organization Maturity Model. This discussion affords the facilitator the opportunity to highlight some of the differences between the levels in the model, as well as to bring in real-world examples from existing organizations to illustrate the aspects and levels.

An interesting add-on exercise (if time permits) is to have the teams then discuss how their community could be "moved up" the Open Organization Maturity Model. Questions to structure that discussion might include:

- Which aspects of your community are most mature? Why did you design them in the manner that you did?
- Which aspects of your community are least mature? Why did you design them in the manner that you did?
- What underlying assumptions did you make when you designed the culture?

- What changes might you suggest to move the least mature aspects of the community to be more mature? What sort of changes would that require in the community?
- Given the current state of your community, what sort of a process would you envision to help the community become more mature with respect to being an open organization?

Dr. Heidi Ellis is a professor at Western New England University and has more than 20 years of experience in software engineering education. Heidi has been supporting student involvement in humanitarian free and open source software (HFOSS) since 2006 and she has been co-PI on four different NSF grants to support this effort. She is part of a group of academics who are working with Red Hat to support Professor's Open Source Software Experience (POSSE) workshops that bring professors up to speed on student involvement in HFOSS projects.

Appendix

The Open Organization Definition

The Open Organization Ambassadors

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

Work in an open organization involves multiple parties by default. Participants believe that joint work produces better (more effective, more sustainable) outcomes, and specifically seek to involve others in their efforts (see also *inclusivity*). Products of work in open organizations afford additional enhancement and revision, even by those not affiliated with the organization (see also *adaptability*).

- 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
April 2017
github.com/open-organization-ambassadors/open-org-definition

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Additional resources

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