The Sociocracy Consulting Group

10-year Retrospective

Articles & Insights from the Collective

2012–2022

Acknowledgements

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Note to the reader:

Both US and UK English language are used through this document, depending on the author's country of origin.

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Introduction

2022 marked the 10-year anniversary of The Sociocracy Consulting Group (TSCG) – a collective of individuals collaborating together across US, Canada, & Australia.

Together, we envision a world where people work purposefully together bringing forth collective intelligence, creativity, and wisdom.

To do this, we help organizations build resilience and adaptability, using a whole-systems approach to collaborative decision-making, project management, and organizational governance.

As such, we provide training, consulting, facilitation, mentoring, and coaching to help organizations become more effective, adaptive, and collaborative.

This retrospective shares with you insights and stories from the members on the origins of this pioneering group.

The retrospective also shares articles authored by members of TSCG, providing meaningful perspectives on the foundations and application of the Sociocratic Circle-organization Method (SCM).

The retrospective is published as a celebration of TSCG, and even more so of the art and movement of sociocracy which has grown immensely during the life of this group.

We hope you enjoy and appreciate this collection of insights. May it encourage and enrich your practice of sociocracy, and bring forth collective intelligence, creativity, and wisdom in your organization.

Erin Young
TSCG member since 2019

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Where Did TSCG Come From?

These are our stories. Our own perspectives. Together, they paint the picture of how TSCG has developed over a decade.

John Schinnerer's Perspective

In 2010, a collection of people (including myself) who had taken tele-classes on sociocracy with John Buck formed a virtual sociocracy study circle to continue learning and sharing with each other. After meeting for some time – as best I recall, at least half a year – we realized that some of us had a common aim of working with sociocracy as consultants and/or trainers. This surfaced the idea of forming a consulting group to formalize the propagation of the SCM (Sociocratic Circle-organization Method), as well as sociocracy in broad terms. That was the start of what became The Sociocracy Consulting Group.

There were many months – perhaps as much as a year – of 'forming' and 'storming' around that idea. It was a given that we would govern ourselves sociocratically. But beyond that, how would we organize our work? Who would we work with? In what sectors? What would our public offerings be, if any? And perhaps most challenging of all – what would we call ourselves?

The name choice was a surprise outcome, as none of the leading contenders prior to the meeting with name selection on the agenda had the word 'sociocracy' in them. I was unable to attend that meeting, and was even more surprised than those who had been present!

For a short while we operated under the umbrella of an existing LLC, Governance Alive, which proved problematic in terms of record keeping and accounting. Then we created a separate LLC for the consulting group, which also proved problematic due to the distributed

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nature of the group, working in not only different states but different countries. The tax and legal implications were manifold and complex. Our third and current iteration is as a collective of independent consultants working together with no legal entity complications.

For the first handful of years, we attempted to align with the people running the Global Sociocratic Center in The Netherlands, which during that time renamed itself as “The Sociocracy Group” – after we had already named ourselves “The Sociocracy Consulting Group.” This attempt to collaborate did not last, as their so-called “franchise” model did not make sense to us, and seemed to consist primarily of giving them money, getting nothing in return, and having our input and feedback ignored in what was allegedly a sociocratic organization.

In the later stages of disengaging from The Sociocracy Group (TSG), we also identified a divergence within our group over working with TSG or not working with TSG. Our essential purpose was the same – to propagate sociocracy into all manner of organizations – but the preferred means differed among members. Ultimately we had a challenging and uncomfortable but entirely necessary separation of the group, with our original catalyst John Buck and his associate Monika Megyesi no longer members of TSCG but continuing to work with sociocracy under John’s previously existing “Governance Alive” business.

During all this time, along with and in support of our consulting work, we continually developed, deployed, and improved both in person and virtual trainings, from short webinars and “Introduction to Sociocracy” sessions to in-depth “Foundations of Sociocracy” and “Facilitating Sociocracy” courses using interactive simulations, role-playing, and other hands-on learning modes.

We have operated sociocratically from the start as an organization, living what we are advocating. Our clients include businesses, nonprofits, grassroots groups, government, educational institutions, faith-based groups, and more.

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Francine Proulx-Kenzle's Perspective

I came to sociocracy by chance in 2008. Some would say it was written in the stars, or that it was serendipitous. All I know is that I am so grateful to my boss at that time, the director of the Institut français at the University of Regina (Saskatchewan, Canada), for his curiosity about sociocracy. After a week-long workshop with sociocratic consultant Gilles Charest, I was chosen to be the in-house trainer for the Institut français. So my first exposure to sociocracy was in the French language, ideal for me. Later on, the Institut français connected with sociocratic consultant John Buck, and I entered into a mentorship towards certification with the global organization, The Sociocratisch Centrum, which culminated in my certification in 2011.

Because of my nature to live in two worlds – French and English – I pursued connections with both The Sociocracy Group (TSG) and The Sociocracy Consulting Group (TSCG). Often acting as a bridge between the two, I navigated multiple roles. Having a dual "citizenship" in the sociocratic ecosystem of the time was enriching for me, as I experienced subtle differences in the application of sociocracy due to language and cultural differences. For a while, there was hope to create a partnership to exchange resources in sociocracy training.

Over time though, the "dual-citizenship" status I enjoyed was questioned by TSG. It became evident that TSG did not see the advantage of my being present in two separate organizations and asked me to choose one or the other. This was fueled by the evolution of TSG and their franchise model, which did not align with TSCG's collective model. Curious to find a "both-and" solution, I entered a year-long period of individual sessions with a TSG-Canada member to help me discern our mutual expectations. Over that time, I realized that our business-model aims did not align. In November 2019, I was officially removed from TSG-Canada. My certification by TSG was also revoked.

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In January 2020, I was certified by the International Sociocracy Certification Board as a sociocracy consultant.

Overall, I am thankful for this unique experience, which contributed to my growth as well as the development of TSCG.

Interestingly, my dual citizenship status in the sociocratic ecosystem is still active. As a member of SoFra (the French language circle of Sociocracy For All), my francophone identity can thrive.

As a founding member of TSCG, I can attest that psychological safety in our organization is alive and well. The four levels of safety – inclusion, learner, contributor and challenger – are tightly woven in the TSCG culture. This opens the door for our "collective" to take risks with different projects while sharing our common aim "to provide training, consulting, facilitation, mentoring, and coaching to help organizations become more effective and collaborative."

Long live TSCG!

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Sheella Mierson's Perspective

In a Jewish service in a synagogue, the person reading from the Torah scroll may spot a letter that is missing or incorrect. (The scrolls are hand-scribed on parchment). The scroll is then considered deficient, and the scribe must correct it before it can be used again. The reason for this is if you believe that the Torah is the word of the divine and that each letter matters, then if any letter is missing or in error the Torah is incomplete.

An ancient Jewish teaching holds that there is one letter in the Torah for every single Jew. I like to generalize that to say one letter for every single human being. According to this teaching each of us has our own letter, whoever we are. This letter is considered a link to our "shoresh neshamah" in Hebrew, our "supernal soul root." When a letter is missing, the Torah scroll is deficient.

The same can be said if anyone's voice is missing; the whole is incomplete. I have always loved this teaching, and a theme of much of my adult life has been to move my parts of the world toward greater inclusiveness.

Many years ago I heard a friend give a speech to a business group, in which he described his first job out of college. He spotted ways to improve the company's operations, and brought his ideas to his boss. The boss responded, "We're not paying you to think." This would have been bad enough for anyone in their first (or any) job. What made it worse in this case was that my friend is African-American and his boss was White. My friend left that job soon after.

My reaction was to think what a waste that was, for my friend and for the company. In all our organizations and companies, we need everyone's contribution. And most people want to know that their contribution is welcome and valued.

When I first learned about sociocracy, it seemed to me to have enormous potential, with everyone having a voice. To quote Richard Heitfield, former CEO of Creative Urethanes, a plastics manufacturing company in the U.S., "When I was an enlisted man in the

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Navy, I wondered why the officers didn't listen to our good ideas. When I became an officer, I wondered why I could never get the enlisted men to tell me what they were thinking. I tell you from experience that sociocracy solves this problem from both ends."

Sociocracy still seems to me to have enormous potential. I have seen so many groups make much more rapid progress toward their goals after implementing sociocracy. And I have seen so many individuals grow in profound ways, both professionally and personally, as they are able to take initiative and be recognized by others.

I was part of the study group that John Schinnerer mentions, and one of the founding members of The Sociocracy Consulting Group. I have seen the progress and growth when working with clients, and I have seen it for the participants in our Foundations of Sociocracy course and especially in our Facilitating Sociocracy course.

As more people learn these skills and more organizations adopt sociocracy, I envision more workplaces where both people and organization can flourish.

This aligns with my passion to create joyful, productive relationships and workplaces, where everyone's voice matters.

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Gina Price’s Perspective

In 2011, John Buck invited me to join a study circle that became The Sociocracy Consulting Group (TSCG). I came to the group after working as a polar research scientist studying the aurora.

Atmospheric light phenomena and ways of governing ourselves may seem unrelated. However they have been associated in the past: lightning with top down divine intervention, and rainbows as a sign of agreement between humans and the divine. So with what might the aurora be associated as it liberates powerful forces on a planetary scale in a structured, dynamic way? As humanity expands in awareness forming an interrelated global society, we need ways of governing ourselves that are liberating, dynamic and scalable. I think sociocracy can answer this call.

Within TSCG, I found myself in the role of Director of the Training Circle. After I experienced simulations in trainings for other organizational systems, the Training Circle wasted no time in producing a new course based on the use of a simulated organization known as the *Harmony Community Development Corporation*. This training invites participants into a vibrant, multifaceted community defined by their geographic watershed. Incidents and challenges are based on real-life scenarios. The first version of *Foundations of Sociocracy* was a 15-hour, in-person training at Narara Ecovillage (NEV) in New South Wales, Australia, in March 2013. Two weeks later we delivered the same course online, adapted for virtual learning.

Our courses are reviewed and improved in a systematic way over time based on participant feedback and instructor debriefs. TSCG members are all proficient in delivering both foundations and facilitator level courses. We deliver online training in pairs as co-instructors, with one instructor taking on the additional role of registrar. We aim to deliver

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consistent, high quality training and we have run thirty-three online courses across all time zones. Courses receive good feedback and engage participants from a wide range of sectors.

Today, TSCG offers training, consulting, facilitation, mentoring, and coaching to help organizations become more effective and collaborative. It provides consultants with an organization to call home, opportunities for growth and development, and professional support. A Training Assistant program offers an entry pathway for new trainers. TSCG brings integrity to my practice and promotion of the Sociocratic Circle-organization Method (SCM). Of particular value is the strong culture of giving and receiving feedback, cutting across the culture of 'niceness' which can pervade the Australian culture in which I live.

In 2008, I assisted Tena Meadows O'Rear in delivering training to the Sydney Coastal Ecovillage, the forerunner of Narara Ecovillage (NEV).

Since then hundreds have attended an evening "Taste of Sociocracy" presented by founder Lyndall Parris, based on Tena's original training. This has led to 83 ecovillage members attending our 2-day Foundations of Sociocracy training, and 44 members attending a shorter bespoke series which I delivered with a team of Narara training assistants. Currently, I am in my sixth and final year on the NEV board. Over this long association, a small, landless group has grown into a complex, enterprising village with over 200 members. Lyndall's grandchildren are amongst the young families where seeds for how to live in an interrelated global society are being sown. Another organization that is seeding a new way of operating is Earth Funerals, where TSCG's Erin Young and I are part of a team upending traditional business models of death in Australia. Here again, sociocracy is lighting the way and key to our approach.

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Erin Young's Perspective

If there's one thing I've learned over my years in working with the Sociocratic Circle-organization Method (SCM), it's that there's not a choice of whether there is power or isn't power in a group of people working together for a common cause. We humans are all born with the ability to cognise, create and perceive. This renders each of us innately power-full, and this power should be treated responsibly. So rather than "is there power?", it seems to be a question of "how is power organized?".

As is commonly seen in ecological living systems, where disturbed open ground attracts pioneer plant species, sociocracy practice has attracted hardy pioneers willing to break new ground amidst the "depleted soil" of conventional practices of organizational governance. Typically, this has involved addressing the entrenched pattern of top-down hierarchy – dealing with a monoculture of power distribution, concentrated in a small few while rendering the rest of the people in the system feeling "powerless".

Circle organization isn't new for coordination of humans. Rather it's an archetypal pattern that has helped develop culture and connection. Cultures around the world with active traditional roots are still firmly connected with circle practice in contemporary times. Similarly, many industrialized cultures are likely to have ancestral links to those who were circle-based communicators and organizers.

When sitting in a circle, it only takes a small shift of the head to get a read on everyone in the space. The non-verbal communication speaks loudly in this context and provides plentiful information that everyone utilizes and integrates while in that formation. A clear expression of transparency.

Circle formations usually have a sense of order by utilizing the round – where one person speaks at a time, without interruption from others. In some cultures a talking piece is passed around from person to person to denote who has the "authority" to

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share. A sense of collective facilitation occurs based on the shared agreement that everyone gets their place to contribute. This expresses equivalence and leads to effectiveness.

It is in this way that the SCM helps people experience both individual and collective agency in getting things done. Like in most living systems, there is no “silver bullet” or magic cure-all that takes away the foibles of humans organizing together. Rather the SCM leans into the emergent edge of not knowing what will happen next, using living patterns to hold the focus on the content of a group’s self-organization.

The SCM operates in the spirit of nature’s design and coordination – similar to that promulgated by David Holmgren of the permaculture movement in the following sample principles:

- observe and interact,
- use and value diversity,
- design from patterns to details,
- integrate rather than segregate,
- apply self-regulation and accept feedback, and
- obtain a yield.

In this way when we come back to the question “how is power organized?” the SCM organizes power by utilizing the traits of living systems. This brings robust momentum and production amongst the whole organization toward their shared vision based on equivalence, effectiveness and transparency. This is the story of human enterprise, valuing and upholding the diverse and ingenious spirit of humanity – designing power with each other rather than designing power over each other.

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TSCG Timeline

2012
First TSCG General Circle meeting
June 7, 2012.

2012
Training offered for both Foundations of Sociocracy and Facilitating Sociocracy.

2013
First simulation-based course introduced, available online and in person.

2013
First TSCG in-person gathering Portland, Oregon, US. (see photo)

2015
Second TSCG in-person gathering
Vancouver, BC, Canada.

2016
Training Assistant Program begins, completed by: Ruth Newport (2016), Luna Coté (2016) Erin Young (2017), Olly Watkins (2022) and Robina McCurdy (2023).

2016
Jerry Koch-Gonzalez leaves TSCG to create SoFA.

2017
TSCG LLC disbanded; formation of TSCG Collective. John Buck & Monika Megyesi leave TSCG.

2017
Establishment of weekly ZROTTT
(Zoom Room Office Time for TSCG Team).

2018
Production – Harvest Bounty documentary & training video.

2018
Third TSCG in-person gathering
Berkeley, San Francisco, US.

2019
Publication – commence regular blog schedule.

2019
Creation of white paper:
"5 Pitfalls of a Top-Down Hierarchy".

2020
TSCG member Francine Proulx-Kenzle certified with the International Sociocracy Certification Board (ISCB).

2021
TSCG member Gina Price certified with the International Sociocracy Certification Board (ISCB).

2022
Anniversary Celebration!
10 years of collaboration
5 members in 3 countries
(2 in Australia, 1 in Canada, 2 in United States).

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Membership History

Current Members:
Sheella Mierson
Gina Price
Francine Proulx-Kenzle
John Schinnerer
Erin Young

Associate Member:
Diana Leafe Christian

Past Members:
John Buck
Luna Coté
Jerry Koch-Gonzalez
Monika Megyesi
Ruth Newport

Collaborators in the foundational design of TSCG
Epi Badillo
Ron Czecholinski
Nate Whitestone
Venn Wylde

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Photos 2013 & 2023

2013 First TSCG in-person gathering Portland, Oregon, US
Back L-R: John Buck, Gina Price, Jerry Koch-Gonzalez
Front L-R: Sheella Mierson, Venn Wylde, Francine Proulx-Kenzle, John Schinnerer

2023 TSCG Zoom gathering in our respective locations
Upper row: Sheella Mierson, Francine Proulx-Kenzle, Erin Young
Bottom row: John Schinnerer, Gina Price

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Articles

Comparing Sociocracy and Holacracy by Sheella Mierson

November 28, 2022

People sometimes ask me what the difference is between sociocracy and Holacracy. I set out to create a table summarizing the answer to that question.

My direct knowledge and experience are solely with sociocracy. What I know about Holacracy is from reading and from talking with Holacracy coaches and people who are in organizations using it. That means I know just enough to be dangerous.

So I asked Anna McGrath, who has a lot of experience with Holacracy and was the first Licensed Holacracy provider in the USA, to collaborate with me on this. We developed a table listing similarities and differences for selected aspects of the two systems.

This table is not intended as a complete reference or introduction to either sociocracy or Holacracy. For an overview of sociocracy, see 5 Pitfalls of a Top-Down Hierarchy and What to Do about Them.

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How Can Leaders Get Around Blind Spots?
by Sheella Mierson

October 28, 2022

What if you could use a decision process that makes your organization smarter than any individual leader or leadership team?

Leaders often ask for honest feedback to help them make better decisions. This feedback could be from people at any level of the organizational hierarchy. But what if the organizational culture discourages people from speaking up?

If the culture does encourage them, people could still be hesitant to speak up. They may have paid a price for speaking up in the past. Even if they do speak up, the leader might have a blind spot – we all have them, after all – and ignore the feedback.

What if your organization could both encourage feedback and ensure that it actually is heard?

Enter sociocracy. This method builds in circular feedback loops so that no one's input can be ignored. It does this in two ways:

- Periodically every group of people who work together holds a meeting to set policies that guide their work. In those meetings, the members of the group interact as peers, with all voices equivalent. This equivalence is generated by
    1. carefully-crafted meeting formats to bring out the wisdom of the group
    2. consent-based decision-making
    3. training for all group members in the skills for 1 and 2 above, with additional training for members who serve as facilitators.

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- Specific roles provide circular (bidirectional) feedback between groups that have more general and more specific scopes of work within the organization. For diagrams and explanation of how this works, see 5 Pitfalls of a Top-Down Hierarchy and What to Do about Them. The result is that information and feedback flow top-down and bottom-up. Information gets to where it is most relevant and useful.

And that leader's blind spot? It becomes less limiting, since equivalence of voice and consent-based decision-making ensure that no one's feedback can be ignored, and good ideas can come from more diverse sources.

The above assumes that people actually do speak up.

The executive director (ED) of a long term care facility introduced sociocracy when she first took on the position. She found out only later that her predecessor had been abusive to the employees. At the first few meetings, none of the employees contributed agenda items and they barely opened their mouths. Finally one of the women brought a thread-bare towel to a meeting. She showed the towel, looking down at her feet the whole time, and said, "This is disgraceful, we need new linens and towels," and sat down. The ED, who had been waiting for just such a moment, said, "Oh my goodness, you are right. We'll get new ones. Thank you so much." The whole room collectively let out its breath. Because of their experience with the previous ED, they had expected the woman who spoke to be fired on the spot. From then on employees gradually began speaking up in meetings and taking more initiative outside of meetings.

Here is this phenomenon in different words and from a different sector: "When I was an enlisted man in the Navy, I wondered why the officers didn't listen to our good ideas. When I became an officer, I wondered why I could never get the enlisted men to tell me what they were thinking. I tell you from experience that sociocracy solves this problem from both ends." (Richard Heitfield, President, Creative Urethanes, Winchester, Virginia, using sociocracy since late 1980s)

When people from diverse sources are contributing ideas and are part of the decision process, it makes the organization smarter. But only if those new voices cannot be ignored – else the leaders' blind spots will continue to carry the day.

If you'd like to introduce just one technique to get the best wisdom of a group, at any level from the board down, try using a round in your next meeting. Ask a question to generate ideas about a challenging topic, or to get reactions to a proposal. Each person in the meeting gives input in turn (with the option to pass), avoiding cross-talk and criticism of others' ideas. People who are usually quiet in meetings may contribute ideas you would have missed otherwise. And people seem to think more creatively when they know everyone will have a turn without interruption. Using a round enlivens a meeting by bringing discipline to it.

Here's another idea. You know those policies that don't really work, yet the organization keeps following them? The next time you consider a proposal for a new or modified policy, view it as an experiment. Be clear what the goal is, then decide on the time frame and how you will know whether the policy is working. That means determining measurements and who is responsible for them. Put the experiment's end date on the calendar, and put the policy review on the agenda for the first meeting after that date. At that meeting, look at the measurements and do rounds to evaluate the experiment based on those measurements. Then decide whether to continue the policy as is, modify it to make it work better, or throw it out and start over.

Sociocracy is a method of governance that creates more inclusive and effective organizations. It is based in part on cybernetics (the science of communications and control) and systems theory. Gerard Endenburg, a Dutch electrical engineer, designed the method half a century ago to run his electrical contracting company in the Netherlands. Businesses and nonprofits in multiple countries are using it successfully.

Thanks to John Schinnerer for editing assistance with this blog. An earlier version appeared in a guest post in the National Council of Nonprofits newsletter, Nonprofit Knowledge Matters (October, 2013)

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Regarding Objections by John Schinnerer

July 18, 2022

A common question we hear as people are learning consent decision-making goes something like this:

“If we determine that an objection lacks sufficient reason, can we disregard it or not integrate into the proposal?”

In other words – can we classify some objections as simply not worthy of attention? Without actually exploring their connection with the proposal at hand? The question itself deserves closer inspection.

It’s important to distinguish here between two possible cases – wanting to disqualify the objection as an objection, or wanting to explore what if any relevance the objection has to the proposal at hand.

The second option is the sociocratic approach. We engage with curiosity, looking for what the objection might illuminate about the proposal. Is there not enough information for a quality decision? Is there an identified or potential risk we can’t afford to take? Are necessary resources lacking? Has some aspect of the context been missed, or ignored?

We have a conversation – typically in rounds, to generate and maintain equivalence – to explore the objection’s relevance to the proposal. After sufficient consideration, we may find that:

- The objection has no relevance to the proposal. For example, we find that it was based on a misunderstanding.
- The objection’s relevance to the proposal does not require modification and integration. For example, it relates to an operational aspect of implementing the proposal that is already taken care of.
- The objection has essential or crucial relevance to the proposal, and some type of modification and integration is needed to resolve it. For

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example, an essential resource for implementing the proposal is not yet available.

Regardless of the outcome, we have regarded the objection as fully as we are able at the time. Even if we find it has no relevance, this is very different from disregarding the objection.

What does it mean to disregard an objection? The etymology (word root and origin meaning) of disregard is "treat as unworthy of regard or notice." If we disregard an objection, we do not even look at it, we do not take notice of what we might learn from it. We dismiss it without consideration.

If we trust that regarding the objection will naturally clarify whether it has value or not, we have no need to ask first whether the objection can be disregarded. We regard it in any case, to find out what it offers, whether that turns out to be nothing useful or something of great value.

In this way, a sociocratic approach renders the original question moot – there is no way to disregard an objection except by first regarding it.

When someone claims that an objection should be disregarded before it has even been explored by the group, that is most often a sign that some other dynamics within the group are in play. Ideally, everyone understands that:

- Objections are valuable because they bring potential for improvement of a proposal.
- Objections must relate with the aims of the group or a role's ability to do its work.
- Objections – like proposals – belong to the circle once they are put forward in the circle.

With these understandings, there is no reason to fear an objection, or to attempt to disqualify it without consideration of what it offers.

A group that knows the value of objections, and knows how to process them well, also knows that they will identify an irrelevant objection as such simply by exploring what if any relevance it has to the proposal at hand.

Speaking in Rounds to Help People Think – Part I by Sheella Mierson

May 11, 2022

"Everything we do depends for its quality on the thinking we do first. Our thinking depends on the quality of our attention for each other." –Nancy Kline, Time to Think: Listening to Ignite the Human Mind

If you prefer listening to reading, this blog is based on a podcast interview by the same name.

Have you been in a meeting where some people spoke a lot and others barely got a word in edgewise? And some of the speakers were speaking to prove that they were right and others wrong? And when people "listened," it was to figure out what they would say next in response or maybe in rebuttal?

All of us have at times. It's painful. And very little happens in terms of new ideas and solutions.

What if there is another way? A round provides that.

What is a round?

In a round, everybody in the group has a chance to speak in turn and without cross talk. People can pass but everyone has a turn to say something if they wish. Rounds have been around for a long time; indigenous peoples have used talking circles for millennia. Most of us grew up using rounds as children in some setting or another. But it's rare that we use them in a business meeting, and it's rare that we use them in families.

Why do a round?

If you're not doing a round, several things can happen. A discussion can turn into a debate. We interrupt each other. People who speak easily in groups speak a lot and others never open their mouths.

A round is a way to make sure that everyone gets a chance to speak, and that we actually listen to each other.

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If a group will be making a decision about the topic, there is likely to be much more buy-in if everyone has had input. And with more ideas to draw on, the decision is likely to be better.

There are multiple ways to choose a speaking order in a group. People can raise their hands to show they want to speak. The facilitator then states an order by "stacking" the list of speakers. Another Is popcorn, where people interject their ideas at random.

Yet another is to agree on a guideline that everyone can speak once before anyone else speaks twice and everyone can speak twice before anyone else speaks four times. But in any of these, there is still a need to make sure everyone has a chance to speak. And I'm watching for when I can get the attention of a facilitator to get my turn. Or watching for an opening to break in and get the group's attention.

In many of these methods, the facilitator has to determine who has had more or less time to talk. The facilitator's own unaware biases can affect that process, as studies have demonstrated. For example, classroom teachers, male or female, may perceive that the female students speak more than the male students, even when the opposite is true.

In a round, something in me relaxes when I know everyone, including me, will get a turn to speak. I can sit back and really listen when others are speaking, rather than wonder when to request a turn for myself or plan what I will say next. I can listen to understand new ideas, rather than listen to figure out how to prove someone else wrong.

We do a round to get everyone's best thinking. When people listen to each other, that is attention, and it is generative. People think better with attention.

Any group has some people who speak less than others, for a variety of reasons. They may be more introverted or they may be shy. Their reluctance to talk may be a result of existing power structures or dynamics, or related to their identity (race, gender, nationality, etc.) relative to the group at large.

Whether for a business meeting or a family meeting, those who see themselves as less powerful might be less inclined to speak than somebody they see as being more powerful. And the person they see as being more

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powerful might be totally oblivious to this dynamic.

The people who speak less may have been told once too often to shut up. Some of us have gotten the message that people don't want to know our thinking. That happens to us when we're children and it happens to us in some workplaces. It's clear that those people benefit from holding a round.

The surprise to me, as someone who usually speaks easily in groups, is how much I benefit from a round. I know that I tend to talk too much at times. So I monitor myself to make sure other people have a turn to talk. Every time a question comes on the table I ask myself, should I start out the discussion or should I wait? If the latter, how long should I wait? All this means that when I speak or when someone else speaks, I'm spending some of my attention figuring this out and I'm a little bit on edge. With a round, I can let all that go.

I've talked with other people who speak easily in groups and report a similar experience as mine. Isn't that lovely that both people who tend to be quiet in groups and those who speak readily benefit from a round?

When do you use a round?

You can use a round in a team or board meeting. Start the meeting with an opening round. Everyone in turn says how they are doing coming into the meeting. You can offer a more specific prompt as well – for example, "If you were some other animal right now, what animal would you be and why?"

An opening round gets people connected, and gives each other information that may help in the meeting. We might learn that one person was up all night with a sick child, or has been spending a lot of time with a family member in a hospital, or just came from a joyous celebration of their brother's wedding – all things that would affect that person's state of mind coming into a meeting. We can be more empathic with each other having that knowledge. A meeting where people are connected is likely to be more enjoyable and more productive.

A round is useful for a variety of agenda items. It can help generate ideas about a challenging topic, invite clarifying questions about a presentation or a proposal, or create space for reactions to a proposal.

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Evaluate the meeting and the facilitation with a closing round. Each person in turn says what went well in the meeting and offers suggestions for improvement. Or ask a different question in the closing round, such as, "What's alive for you now?" If there's anything hanging over from the meeting that we need to say, to leave the meeting emotionally when we leave it physically, we have a chance to say that.

A closing round means people are more likely to leave the meeting connected to each other. And it provides feedback so that the group can keep improving.

Even a group of two people can do a round. Take turns listening to each other, rather than interrupting each other and both people talking at once. (If both people are talking, who is listening?)

You can even time the turns if you want, to take, say, two minutes each or five minutes each. That's particularly good to do if the subject is loaded for both of you and it's hard to listen to each other. It can completely transform the interaction.

Here's an example of using rounds in a team meeting when considering a proposal.

We worked with a company that designs and builds machines to manufacture specialized metal equipment. They needed a naming system for their machines, so both they and clients would be clear about what machine they were talking about.

In a policy meeting we facilitated, someone brought a proposal for how to name a new machine. The proposal looked straightforward. The process they used in their meetings called for doing rounds first for clarifying questions and then for reactions to the proposal.

From those rounds, it was clear that the issue was more complex, and they needed a more general scheme that would accommodate other machines in the future. They consented to a modified proposal for this machine, and planned to develop a broader proposal at a future meeting to handle more machines.

When I first thought of this example, it seemed to me humdrum. Then I realized that it seemed that way because I have gotten so used to this

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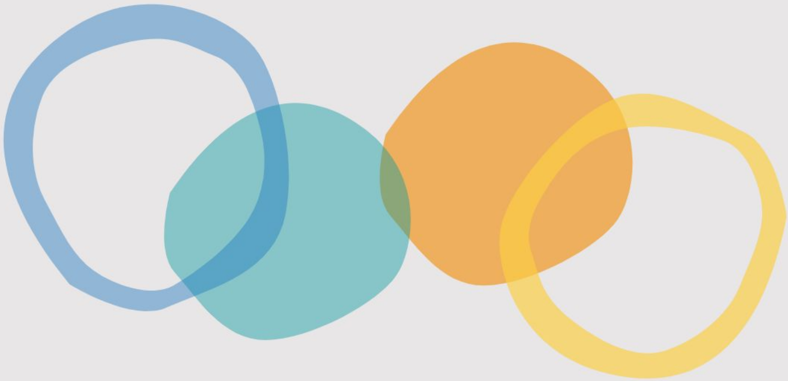
happening when there are rounds in a meeting. What seems a simple proposal crafted by one person turns into a much better proposal when all people and ideas can be heard, and people aren't trying to defend their ideas from each other.

Families of all ages use rounds. A family might use rounds to plan a vacation, or decide on a meal menu, or set a policy about screen time for young children. See Francine Proulx-Kenzle's story of using rounds to discuss family meal times, Spaghetti Night: Mothering with Consent.



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Speaking in Rounds to Help People Think – Part II by Sheella Mierson

June 10, 2022

"When someone deeply listens to you, your bare feet are on the earth and a beloved land that seemed distant is now at home within you." –John Fox in Poetic Medicine: The Healing Art of Poem-making

If you prefer listening to reading, this blog is based on a podcast interview by the same name.

In the previous blog I talked about what rounds are, and why and when to use them. Here I'll discuss why they work including some basis in neuroscience, what gets in the way of using them, and some tips on how to use them.

Why do rounds work so well?

A round contributes greatly to establishing psychological safety. For example, if people are constantly interrupting me when I'm talking, I am on guard. That affects how my brain functions.

Our brains have two main functions: to connect us for growth and to keep us safe. I call these two neural networks the Connected Brain and the Safety Brain, respectively. When I'm on guard, I'm functioning at least in part from my Safety Brain. Yet my Connected Brain is the main source of new and creative ideas. Studies from neuroscience confirm that we think better when functioning from our Connected Brain. Here are two explanations for why we think better, given by Nancy Kline in More Time to Think: A Way of Being in the World (p. 57).

Being listened to is a form of appreciation. People think better when they are being appreciated than when they are being criticized. Neuro-imaging studies looked at how appreciative thoughts and feelings affect blood flow to the brain, compared to when we are thinking critical thoughts. Blood flow to the cerebellum, cingulated gyrus, and left basal ganglia decreases when we think

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critical thoughts, and increases when we think appreciative ones.

Based on research from The HeartMath Research Center, when the heart's rhythm and pattern are at healthy levels, the cortex gets active. In the presence of appreciation, the rhythm and pattern of the heart move toward those healthy levels. So appreciation moves through the heart to stimulate the brain to work better.

Rounds provide an environment that helps people think. Groups of people have a "collective intelligence factor," a so-called "c-factor," analogous to "general intelligence" for individuals. According to a study in Science Magazine a decade ago, that c-factor is independent of either average or maximum individual intelligence of group members. The more equality there is in conversational turn-taking, the higher a group's collective intelligence. Other studies, including those in Google's Project Aristotle, have confirmed that finding. Rounds increase conversational equality and make a group smarter.

A round can include feelings and positive feedback. That means more psychological safety and that people are more likely to bring their whole selves to the meeting. That in turn results in more connection among people, clearer thinking, and willingness to consider others' ideas.

If rounds are so effective, what gets in the way of doing them?

A round is different from what most people are used to. A common reaction is, "How could we make time for that?"

The paradox is that a round can save time. Creative ideas surface sooner. People listen more generously since they know they will also have a turn. Quiet people can hold as much sway in the meeting as the vocal ones. Everyone relaxes as they get more experience with the process and grow to trust it. New ideas, productivity, and connections energize the participants – even in a virtual meeting.

Here are a couple of specific reasons why rounds can save time:

If a discussion has turned into a debate, people sometimes restate what they've said to be sure they are heard. (I have certainly found myself doing this.) That takes time. And that tends to happen less when using rounds.

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Without a round, one person may start out proposing an idea. Even if it's a dead-end idea, the group could spend a bunch of time discussing or even debating it before discarding it. On the other hand, if the group starts with a round, they get a whole lot more ideas at the start, and can then pick the most promising ones to discuss further.

There's another reason why some people resist doing rounds, and this one is more challenging. A round puts everyone on an even footing for the time of the rounds. Some people are threatened by that, whether executives in companies or parents in families. If you agree in principle that a round could be a good idea and wonder if you're hesitating for this reason, it may feel like jumping off a diving board for the first time. Take a deep breath and jump.

Then pay attention to the results. You may want to discuss your experience with someone else at the meeting. If you have resistance to doing rounds, you might also have a blind spot for what you observe in a meeting with rounds. Looking at the results of rounds with someone else can correct for that blind spot.

Tips for doing rounds

If you are the facilitator, you can say, "Let's do this as a round." Anyone else in the meeting can also suggest it: "I'd love to hear everyone's ideas about this. Could we have a round to hear from everybody?" It's the same in a family: "Could we hear everyone's ideas in a round, and do it without cross talk? We can discuss the ideas later. First, let's hear from everybody without interrupting each other."

It's fine to pass when it's your turn in the round. Say "Pass," or "My ideas have been said," or "Nothing to add." It does the group a favor to pass rather than taking time to repeat ideas that have already been said.

If you are the facilitator, call on people in the round. For an in-person meeting, ask someone to start the round and then go around the circle or the table. It's clear that way whose turn is next. Be sure to include yourself in the round, either first, last, or in the middle. You can even mix the order up from one round to another.

In an online meeting, the order is less clear. It's easy for two people to start talking at once or to have a long pause

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until someone starts. You can avoid either of those by calling on people. An alternative is to call on people two in advance: “Let’s hear from Jerome next, and then Francesca.” That gives Francesca time to anticipate turning on her microphone if it’s muted, so it can save a little time. The downside is that Francesca, who now knows she will be next, may start thinking about what she will say rather than listening to Jerome, and some spontaneity – which can be a source of creativity – is lost. You might want to experiment with this and see which method you prefer.

If you are facilitating a team meeting and time is limited, you can ask everyone to respond in, for example, three sentences. Or you can set a time limit per person, and then be prepared to tell them when that time is up. If it’s a large group, divide into smaller groups. Have them do a round in each group with someone designated as facilitator, and ask them to select a reporter to summarize the group’s ideas to the larger group. The reports can have a time limit as well.

Try these approaches to create productive and enjoyable meetings where everyone can speak candidly, new and creative ideas emerge, and people leave energized.

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Zen and Sociocracy by John Schinnerer

March 24, 2022

The Zen school of Buddhism has a long history, and a great variety of disciplines and lineages. This post explores a few similarities between the wisdoms of Zen and sociocracy, based primarily on contemporary lineages of "engaged Buddhism."

Not Knowing

Fundamental to most forms of Zen Buddhism is a commitment to penetrating the unknown – that is, releasing attachments and assumptions, 'not knowing', being open to new possibilities.

In sociocratic contexts, we embrace and embody a similar commitment by understanding that, for example, a proposal put forward in a policy meeting is merely a starting point. Whatever the proposal claims to 'know' about what is needed may be partly or completely changed by the time we reach consent. We don't stay attached to the starting point – we explore it, we examine it, remaining open to new information, awareness, and perspectives.

The 'election' process – that is, selection by consent – is similar. We may or may not know at the start whom we want to nominate and why. Even when we do have a clear nomination to begin with, we remain open and listen to all the other nominations, and any changes, and reasons for those. We hear what others are bringing to the conversation and let it inform our thinking along our path to consent.

Even more so, the proposal generation process invites 'not-knowing', as we start with only an issue to address. First we simply describe and define the issue – 'bearing witness' to it – from all our different perspectives and experiences. Then we attempt to go beyond that and 'bear witness' to it as a group – setting aside our individual ideas of 'knowing' what it is, to find a collective understanding that serves our larger purpose.

Oneness

Another fundamental tenet of Zen is recognizing the oneness of all that we

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typically think is separate. We come to understand, through deep observation, that what one 'part' does affects all other 'parts', to some degree or another. Through seeing how 'parts' affect each other, and make up a whole system, we may find ways to reduce suffering – that is, to increase harmony – within the system.

The root of the words organization and organism are the same. An organization is like an organism in that what we see as 'parts' – employees in an organization, individual organs in our bodies – are highly interdependent, are parts of a larger whole. There is feedback – communication back and forth – among the 'parts', whether it is our stomach and liver, or our production team and our sales team.

If this feedback is not sufficient for the needs of the organism, or organization – in quantity, quality, or both – then problems will arise. We may have abdominal pain and discomfort and poor digestion. The products the buyer receives may be different than what they expected from the sales brochure.

A sociocratic organization creates structures and processes to ensure adequate quality and quantity of feedback. The most essential form of this is the 'double linking' between circles – two people, one chosen by each circle, who are members of both circles.

Direct Experience

Many lineages of Zen have a commitment to 'knowing' through direct experience. Rather than learning abstract spiritual theories, or memorizing endless sutras, Zen asks us to pay attention to what is happening right now, in the present moment. Not just a little of our attention – all of it! Or as much as we can manage, at least. From this intensity of attention to "what is – right now," we may find ourselves seeing, hearing, feeling, and understanding differently than when we are thinking about the past or future. Our minds may change, and our actions as well, to adjust to our new understandings.

In a sociocratic organization, we are usually acting over some span of time – doing something with some desired outcome. We have a similar commitment to pay attention, in our somewhat different context.

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One way we do this is by identifying measurements and means of evaluation for what we are doing. What do we pay attention to, so we know if we are getting what we want? We also set reminders for ourselves about when we will pay attention to measurements and evaluation – the term we set for a policy, for example, or the frequency of measurements.

Attachment and Resistance

Resistance to trying sociocratic structures and processes, and resistance to trying Zen structures and processes, are much the same. Both systems invite us to step into some amount of 'not-knowing' – to change how we think, what we think we know, and how we do what we do, in significant ways. The more resistance we experience, the more significant the changes likely are.

This resistance can equally well be described as attachment to current structures and processes. We would rather continue knowing what we already know, and doing what we already do – even when we are not getting what we want from that knowing and doing. It still appears more comfortable than stepping into the 'not-knowing' of unfamiliar, possibly challenging structures and processes.

We offer countless excuses, justifications, and rationalizations for avoiding such changes, whether in a context of spiritual practice or of organizational governance. I'm too busy. That's too risky. I don't have the capacity. People will be upset. I've always done it this way. In Zen, these are all seen as some form of attachment. In other words, resistance to 'not-knowing'.

Avoiding Insanity

These similarities between aspects of Zen and sociocracy are not exact. Sociocracy is not designed to be a spiritual path, and Zen is not designed to be a way to run organizations.

What they have in common at a broader level is invitations to look, think, and act systemically. To pay attention to what is right in front of us at the present moment, while also remembering larger perspectives.

Perhaps most importantly, both Zen and sociocracy invite us to avoid that often quoted working definition of insanity – "doing the same thing and expecting different results." As one partly humorous, partly serious Zen bumper sticker says: "Don't Believe Everything You Think."

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Getting to 'Yes' Starts with Hearing the 'No'

by Gina Price

March 8, 2022

Heed objections or exclude objectors?

"I have an objection," said Jodie, a young health worker. "Our training is for people suffering from loneliness in isolation. This decision will put off the people we are wanting to help!"

Jack had proposed to the policy meeting that the group's in-person training be delayed if there was a lockdown due to COVID. The training was core to the group's project of co-designing and delivering an eight-week community-based program for young people impacted by loneliness.

"This will jeopardize the project!" Jodie added. "Many of my peers are scared to leave their house, anxious of being infected with COVID from mixing with strangers."

Is "no decision" a decision?

The facilitator led a round in the policy meeting. No ideas emerged that would resolve the objection and lead to consent of the proposal. The facilitator then declared, "Looks like we have 'no decision' and no ideas for modifying the proposal. I think we need to start fresh with a new proposal." Boldly, the facilitator asked "Would Jodie and Jack be willing to work together and bring a new proposal to next week's meeting?" With surprising enthusiasm, Jodie accepted the task and Jack agreed to partner with her. There were no objections to moving forward in this way.

In the closing round, members reflected on their experience of the meeting. Jodie liked being assigned homework. Another member had observed how a productive conversation came with hearing objections. Jack noticed that he had shifted his view, that training should be

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in person, by 180 degrees over the course of the meeting. The facilitator reflected that despite 'no decision' being made, there seemed to be a renewal of energy.

At the following meeting, the group consented to a new proposal brought forward by Jodie and Jack. Everyone was inspired!

Rejecting the Objector

"Sometimes, if someone digs their heels in, uncomfortable compromises have to be made," said Mark in another group struggling to amend a proposal to resolve a member's objection. "I think we should exclude the objecting member from the consent round. Life goes on, things need to be done, and we can't wait for bright ideas to turn up according to their own timetable."

In the Sociocratic Circle-organization Method, an objection is a reason why a proposal does not support a group's aim or purpose. Consent is achieved when all objections have been resolved. Are there times when a different approach is required to be able to make a decision? Is excluding an objecting member from a consent round an option?

When making policy decisions, excluding someone from a consent round on the basis of an objection is a dangerous practice. It undermines the principle of consent decision-making, which is designed to ensure that no one is ignored. While excluding someone may deliver a quick-fix policy decision, it will compromise trust and psychological safety, and reduce the quality of the group's decision.

Policy versus operational mode

'No decision' in a policy meeting need not unduly impact daily functioning when the difference between policy mode and operational mode is understood. Operations are guided by policy decisions, which include delegating responsibility for tasks to operational roles. Operational roles have the authority to make day-to-day decisions in line with existing policy.

Policy decisions are decisions that guide the work of the group by setting standards and parameters. In the case of not making a new policy, the current policy (or lack thereof) remains. Alternatively, an experiment can be carried out trialing a new approach, with results informing the subsequent

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development of a new policy proposal. Operations can continue either way. It is a misconception that operations will be stalled if there is no consent to a policy decision.

Solutions come from the combination of people and process

Creating a culture where we accept 'no decision' helps us work together effectively. Just as objections can bring forward useful information, a 'no decision' can be valuable and renewing.

Hearing the 'No' is a better way of getting to 'Yes' than avoiding or overriding it. Cultures that welcome a 'No' build a better quality 'Yes', and trust and resilience along with it. While it may be tempting to exclude an objection or an objector, quick fixes can bring a slow withdrawal of trust. The best solutions come by engaging people in the process, rather than excluding them from it.

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Governance and Mental Health by Francine Proulx-Kenzle

November 9, 2021

I've been working in the domains of organizational governance and positive mental health for more than ten years. At first, I did not see the connection between these two areas, keeping them in separate silos. I see it differently today. Let me explain more specifically by looking at the connecting thread between the Sociocratic Circle-organization Method (SCM) and Mental Health First Aid (MHFA), two areas I am passionate about.

Brief definitions

Sociocracy, a whole-systems approach to governance, is designed to organize work and to make decisions that guide the work. The SCM sets the stage for a healthy organizational governance, creating psychologically-safe environments and productive organizations. It also sets the stage for more inclusive and effective organizations, where all stakeholders have a voice.
Positive mental health enables us to realise our potential and be active, productive members of our communities. Also known as "positive mental well-being," it enables us to cope with stress effectively and bounce back from life challenges. MHFA training is designed to increase mental health literacy and reduce the stigma of mental health problems. This training provides skills and knowledge to act as a first aider to someone experiencing declining mental well-being.

The dashboard (below) created by Canadian psychologist Dr. Georges Sabongui, PhD is useful in understanding the different levels of well-being. I have this dashboard on my wall as a reminder to check-in regularly with myself. How am I showing up? Is my stress manageable?

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How am I doing with my self-care strategies?

The pandemic and its topsy-turvy impact on our world has increased my stress. This has been an opportunity to practice what I preach! That is, to do my best in balancing the four dimensions that constitute my mental health: emotional, physical, mental and spiritual. A dash of humour and resilience also helps the mix. For me, this means limiting my screen time, going for walks, reaching out to family and friends, playing with the cats, meditating and eating one piece of decadent chocolate daily.

A Sociocratic Experience

I first learned about sociocracy when I worked for an organization that applied the SCM as an overlay to an existing structure. We were 17 employees with varying roles and responsibilities, participating fully in the fulfillment of our aims. As leader of one of the teams, I also took part in the "general circle" along with a delegate from my team. Each of us had a voice in policy decision-making. This was made possible with a circle structure that included the concept of double-linking, providing two-way feedback within the organization.

Early on after the implementation of the SCM at my workplace, one of the teams proposed to renovate a spare office into a mental wellness room for individuals to use at their discretion. Since this policy would affect all employees, it was brought to the general circle for their consideration and approval. After in depth discussion by all the members of the general circle, it was adopted by consent (no objections). Interestingly, this mental wellness benefit was never abused by the employees.

When healthy organizational governance and positive mental health are present on a team, chances are that contributions will be engaging and productive. In my experience, our policy meetings were recognized as a safe space to think outside the box and bring up new ideas to reach our circle's aim. The opening round acted as a gauge of our well-being in the moment, welcomed with no judgment. This was helpful information for each of us as we tackled the agenda items.

I especially enjoyed the consent decision-making process, which uses rounds. For someone like me, who is sometimes too quiet, it encouraged me to contribute my part. The lack of

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interruptions while I expressed an idea made me feel valued and respected. And for colleagues who were more extroverted and at ease with speaking up, they knew that they would get their turn to speak during the round, with no cross-talk from others.

How we raised objections and addressed them as a team was very enriching. In this part of the process, everyone was encouraged to be frank, honest and open while focusing on our circle's aim. We actually made a point of welcoming objections as gifts to improve the proposal idea. Even though the objection was raised by one person, the whole team took part in resolving the objection. Our meetings always ended with a closing round, providing a safe space for feedback on what worked well and what could be improved.

The SCM and MHFA: Connecting Thread

Let's think about it. Each individual brings to a team their unique life experience, their personal views, their challenges, and their aspirations. So what happens when we feel stressed or worried or sick? Our ability to focus and concentrate may be decreased, affecting our problem-solving capacities and our productivity. This affects the whole team. We can say "Not me, I never bring my personal life into work". This is almost impossible. We are humans, not robots. Our emotions inform how we react to situations in the present moment.

The MHFA weaves a connecting thread through the application of the SCM: listening and communicating nonjudgmentally. This is one of the six actions applied when providing first aid for mental health to someone with declining well-being. In my experience using the SCM, listening and communicating nonjudgmentally open the door to diversity of ideas and creativity, important to stimulate collective intelligence and innovation. It also raises the level of trust and psychological safety, which in turn affects a team's positive mental health. I find it fascinating how MHFA's "listening and communicating nonjudgmentally" loops back and forth through the SCM fabric, thereby strengthening the organization's potential.

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Can Sociocracy Help with Conflict by Sheella Mierson

September 15, 2021

People who first hear of sociocracy often ask, “Can that help with conflict?” My short answer is usually, “Yes, it can help, depending on the cause of the conflict.” A better answer is, “Yes it can, but better yet it can help prevent conflict in the first place.”

Lack of clarity can contribute to conflict

In any group that makes decisions together, lack of clarity in several key areas can lead to conflict. When a group repeatedly butts heads with each other and has trouble coming to resolution, one question to ask is, have they all agreed on their common goals? And does everyone understand those goals to mean the same thing?

In the Sociocratic Circle-organization Method (SCM), those goals are expressed as the aims of the group. The aims are the products or services the group provides. An aim is more specific than the mission – it’s part of what the group does to carry out its mission.

Having a shared aim(s) is important in a couple of ways. If people have different aims, it is as though they are rowing a boat in different directions. Furthermore, the consent decision-making method of the SCM requires a common aim as the basis for objections. Members can object to a policy proposal if the policy would jeopardize achieving that aim – see our white paper about the SCM. If a group lacks a common aim, they also lack a clear criterion for decisions.

If people in the group are working toward different aims, the solution may be to acknowledge that and find an aim to which everyone subscribes. Or, the group may decide to split into two separate groups.

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Recently a friend told me about an internal conflict around a policy decision in a grassroots organization to which she belongs. I asked her several questions: (1) Has everyone agreed on a common aim and is the aim clear? (2) Is the decision-making method clear? (3) Is it clear what sub-group makes that decision? (4) Does that sub-group have a defined membership, rather than people dropping into a meeting? The answer to three of those four questions was "no". That's a prescription for conflict.

A group needs clarity about the domain of decision-making for each sub-group (each "circle", in SCM terminology). Domains should be distinct. Then it's clear who owns which domain. The domains should include all the areas for which the group makes decisions. If domains overlap, more than one sub-group thinks something is their job. If there are gaps between domains, things can fall between the cracks and no one takes responsibility. Either is a prescription for conflict or at least frustration.

In an employee-owned company I worked with, lack of clarity about the domains led to frustration and disappointment. Worker-owners, after all, expected a voice in the company decisions. Overlap or gaps in the domains resulted in finger-pointing when issues went unaddressed or unresolved. Clarifying the domains for all areas of the company's decisions made a huge difference. People then knew where to go to address any issue – see this case study on distributed leadership in a manufacturing company.

Above I've listed four questions to ask about a group experiencing conflict. Let's continue that list. Any circle can delegate a type of decision to an individual. If they do this, then there is another set of questions: (5) Is that person's role clearly defined? (6) Is it clear to that person and to the circle what is within that person's domain of decisions? (7) is that person making the decisions on their own, or are they expected to seek advice first, and if so from whom? (8) Is it clear what the mechanism is if someone is affected by a decision after it is put into effect, and wants to provide feedback? A lack of clarity for any of these can be a prescription for conflict.

Here are a couple more questions to add to our list. (9) Any organization has agreements and policies that guide day-to-day operational decisions (for

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a discussion of policies and operational decisions in the SCM, see our white paper). Are those agreements and policies in writing? I have seen countless arguments when people had different memories of what they had decided in a meeting, even as little as two months earlier. (10) Are those written policies available for anyone in the group to see? Here's my refrain: A lack of clarity and transparency can be a prescription for conflict.

Back to having a clear decision-making method, mentioned in question (2) above. There are multiple ways of making decisions. It is a prescription for confusion and conflict if people expect one method and it's really another. Will one person make the decision, with or without input from others, or will the whole group decide? If the latter, will they do that by majority vote, by consensus, or by consent?

Where do we need clarity?

Clarity is key in how an organization functions. Lack of it can be a prescription for conflict. There is a flip side to this, and it's good news. Anytime there is a conflict, we can use it as a chance to ask, where can we use more clarity? Maureen McCarthy asks that question in a couple of wonderful articles (see references below). We usually think that conflict means there is a problem, or that there are "problem people." We can instead view the stress as a message that we care about a matter, and that we need clarity in some area. Increasing that clarity can improve the organization and the relationships within it.

What about those personality differences?

When people ask me if sociocracy can help with conflict, they are likely thinking of personality differences among people. There are several parts of my answer about that.

(a) Often what we think is a matter of individuals who have difficulty working together, actually stems from one of the ten organizational issues I've listed. Those issues can be hidden beneath the surface.

(b) If a couple of people have personality differences that lead to difficulty working together, any of these organizational issues can exacerbate the difficulty.

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(c) Consent is foundational for making collaborative decisions in the SCM. There are clear meeting formats for every stage of making collaborative policy decisions. The use of rounds is key to each stage. Rounds help everyone be able to speak and to listen to each other. Otherwise it can be a debate where people try to bolster their own position and prove each other wrong. When a group uses rounds, new ideas emerge. I've seen the level of tension in a group go way down as this process progresses in a meeting. And I've seen the atmosphere change in an organization as they get used to using rounds in meetings. In one organization, people learned to listen to each other more both in and out of meetings. They decided they liked each other. And they started collaborating more – to the benefit both of themselves and of their customers.

(d) A group can use any method of handling conflicts between people as long as the group consents to use it. It's a good idea for a circle to have a written agreement about what methods or resources they will draw on if and when they need it.

(e) Of course, there are situations where two people cannot work together. All members of a sociocratic circle need to consent to being in the circle together. If they know of difficulties at the outset, they can refuse that consent. In that case one or both people might join other circles in the organization. If there are persistent difficulties, a circle can withdraw consent for membership for someone in a circle. This is a last resort and is rare, but it does happen, and it's important that there is a clear mechanism for it to happen. Personally, I want to know before joining any group if there is a clear way to accept new members, and a clear way to remove a member if the circle can no longer function. If people feel trapped with the group as it is constituted, that can be a prescription for continuing conflict. Or other people will leave, and it might not be the people you'd want to leave.

John Schinnerer, my colleague in The Sociocracy Consulting Group, is fond of saying, "There's no human-created system that's proof against human behavior." There are organizational practices that can improve the odds.

Summary list

Here is a summary list of some key organizational issues that could

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indicate a need for more clarity when dealing with conflict. The numbers refer to my examples above.

1. Common aim
2. Decision-making method
3. Domains of responsibility and authority
4. Defined membership for circles
5. Definition of roles
6. Delegation
7. The process by which an individual makes decisions delegated to them
8. Mechanism for other individuals to give feedback on decisions made by an individual
9. Agreements and policies in writing
10. Transparency of written agreements – accessible to all

There's a shorter list of key points to consider when dealing with conflict that appears to be due to personality differences:

a. The difficulty really stems from one or several organizational issues.
b. Organizational issues exacerbate the difficulty.
c. Clear processes for meeting formats of the SCM can help avert or address conflicts.
d. The group can use any other method for handling conflicts, if they consent to use it.
e. Sometimes, it really is due to personality differences. Need clear processes for accepting or removing circle members.

My impression is that personality differences – sometimes framed as "dealing with difficult people" – gets far more consideration than organizational issues. Valuable as the work on individual differences is, I suspect that organizational issues are often the true cause of difficulty, and would benefit from our attention.

References

- Maureen McCarthy, Worry vs Care: Is Stress a Warning or Message?
- Maureen McCarthy, Relationship Design in Uncertain Times

Decolonizing Decision-Making by Francine Proulx-Kenzle

August 13, 2021

Talking Circles

Indigenous Peoples have used talking circles and practiced inclusion and collaboration for millennia. All leaders in a tribal council are heard, without interruption. Decision-making happens in a circle, and all living things are viewed as equal within the circle.

Power-with is a dialogue, where everyone stands on the ground, face to face.

The colonial history of Canada is brutal and shameful. We have been reminded of this by the recent discoveries of unmarked graves containing the remains of hundreds of children near former residential schools. Colonialism is power-over in its most insidious form, covered over by lies.

What I was taught in school was either incomplete or untrue.

One Step at a Time

The Truth and Reconciliation Commission of Canada is making 94 Calls to Action, which includes building relationships between non-Indigenous and Indigenous Peoples. Getting to know one person, attending one potluck, participating in one Pow Wow at a time. Taking that risk to fully show up with sincerity and openness.

Truth can be deceptive and reconciliation evasive.

Jackie Ottmann, member of the Fishing Lake First Nations, Treaty 4 Territory, and President of First Nations University of Saskatchewan says, "Reconciliation begins with self," and that we must connect with ourselves emotionally, spiritually, physically and intellectually in order to move into spaces of reconciliation.

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Working together

The future is together, requiring an alignment of ways. Reconciling ways of speaking, listening and making decisions. The Sociocratic Circle-organisation Method (SCM) uses circles, rounds and consent to make decisions in ways that are compatible with talking circles.

Power-with decision-making shifts the patterns of colonialism.

At the local level

An Indigenous friend and I share our enthusiasm for working in circles and sharing in rounds. We find compatibility with aspects of her Indigenous culture. Together we have introduced the SCM to a non-profit organization where she is a member.

Working together starts at the personal level.

At the national level

Canada has officially appointed its first Indigenous Governor General, Inuk leader Mary Simon. This is both remarkable and timely. While uncovering a hidden past it is time to move forward. She sees "...reconciliation as a way of life that requires work every day. Reconciliation is getting to know one another."

Boldly, I contacted her office to see how I could contribute. I'll keep you posted!

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Power-With at Play by Erin Young

June 29, 2021

Power-with is a mode of operating in deep collaboration, central to the Sociocratic Circle-organization Method (SCM). Should you be familiar with the gracious and effective momentum of the SCM, you will understand the natural intelligence embedded in its power-with approach.

Here we explore what power-with is, and why it is so powerful to organizations in actualizing their impactful visions.

Three types of power

In her 1990 book 'Truth or Dare: Encounters with Power, Authority and Mystery' (Harper Collins, 1990), Starhawk outlines three types of power in groups and organizations. She describes power-with as "social power, the influence we wield among equals".

It's useful to acknowledge the other two types of power described in this book, for context.
Power-over is linked to domination and control, stemming from a mechanistic worldview. The members of a power-over system are valued not for what they are intrinsically, but according to an external measure. Starhawk describes: "Power-over enables one individual or group to make the decisions that affect others, and to enforce control." Potentially a workable option if and when the authority has the collective good guiding its decisions; and a strong ability to consider the health of the whole system. Too often though, power-over is an approach that can't do true justice to the complexity of the system.

Power-from-within is described as "the mysteries that awaken our deepest abilities and potential". Starhawk links this to a personal sense of empowerment to act, create and develop mastery. This is the power we

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know as individuals with a strong sense of agency, i.e. empowered choice. This is an important muscle to develop, though it can be combative and counter-productive if not cohesive with the other individuals within the system.

Power-with is a vital approach for power sharing within and between groups. Starhawk further describes this as "the power of a strong individual in a group of equals, the power not to command, but to suggest and be listened to, to begin something and see it happen." Power-with is the binding agent of productive and empowered collectives – where members understand the role they and others carry in contributing constructively toward the greater whole.

If you have experience with distributed leadership models like the SCM, you know first-hand the innate power-with engagement of collective intelligence and wisdom that occurs. This is the spirit of power-with, helping organizations evolve beyond the classic notions of organizational authority automatically leading with power-over.

Power-with at play

In the SCM, power-with delegates domain-specific authority to those with expertise in that particular area or field (held within the unit of the 'circle'). Instead of the 'boss', sitting in their lofty office floors away, determining the next steps of the productive team navigating numerous moving parts, process design and decision-making is held by those with the on-the-ground knowledge.

Team members use patterns of power-with process for guiding their decision-making. These self-corrective and responsive processes adhere to and tie in with organizational norms centering around effectiveness, equivalence and transparency.

Power-with distributes authority from a minority (e.g. 'the boss' as the classic enforcer of control) to the organizational 'body' i.e. it's collective of members. A team carries responsibility for achieving their specific aims and objectives. The team members are equally responsible for responding to outcomes and consequences of their decisions and actions. They share a diversity of perspectives and skills in contributing to collectively shared decisions.

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For example, an administrative team uses the consent decision-making process to determine how they will store company records. The team solicits clarifying questions and reactions via ‘rounds’ to gather responses and information for a proposed policy on how to store the company records. They eventually determine the forward path which they all deem “good enough for now and safe enough to try”. All of them act together as ‘sensors’ in how this policy aligns with their circle aims so that they contribute adequately and adaptively to the organizational mission – to which other teams are similarly contributing.

Another example is the phrase “knowledge is power”. The SCM’s core value of transparency is at play when information access is available to all members of the organization. Meetings are documented clearly, methodically, and in summary, providing reference points for self-correction and adaptation down the line. Equally, the simple act of using rounds to hear what every circle member needs to know and has to say about a policy proposal allows an ‘ecology of voices’ to access knowledge and information from within the living system. This generates understanding and trust among team members as they provide leadership through the power-with consent-based boundaries within which they agree to work.

Implementing power-with design and processes in a collective scenario – such as what the SCM provides organizations – activates a living intelligence similarly experienced in the natural world. This is one that moves beyond the rigid constructs of domination and control towards being truly adaptive, responsive and effective through deep power-with collaboration.

[1] Starhawk (1990), ‘Truth or Dare: Encounters with Power, Authority and Mystery’. Harper Collins, New York

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“It’s Nothing Personal” – Elections and Objections by John Schinnerer

May 4, 2021

When we put someone in a role in a sociocratic organization, we use a transparent process of selection by consent. At the start, each circle member in turn nominates someone for the role. They give reasons why their nominee is well suited to the qualifications and responsibilities defined in the role description. Then each person in turn has an opportunity to change their nomination, based on what they may have learned from others’ nominations. Next, the facilitator proposes a specific nominee to fill the role, based on reasons given for nominations and changes to nominations.

After the candidate to fill the role is proposed, the facilitator asks each circle member if they have any objection to that person filling the role. This is where people new to the process may experience discomfort, may have concerns, may want to do something more familiar.

“How could I object out loud in front of the whole group?”

“What if I want to argue more for my nominee?”

And perhaps the most common: “I don’t want to hurt their feelings!”

For some of us, ‘objecting’ to someone filling a role seems very personal. We may think of it as ‘mean’, or ‘rude’, or simply ‘not OK’, even if we cannot articulate why. The action of ‘objecting’ generates mental and sometimes even physical discomfort.

Our perspective shifts when we realize that ‘objections’ in sociocratic selection processes are not personal. Objections are not about some problem or lack in the person, as a person. Objections are about the ability of that person to meet the qualifications and responsibilities of the role, for the benefit of the circle.

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The role may require training and experience in operating a specific piece of machinery. If I lack that training and experience, that is not a 'problem' with me as a person. It is a fact of what training and experience I do, or do not, have. I am not a better or worse person, in general, because I do or do not have that training and experience. And, in practical terms, even I can understand that I lack essential qualifications for that role!

Objecting to someone filling a role when they lack the qualifications to fill that role is a service to both that person and the circle. The circle needs the role adequately filled. The person selected needs to meet the qualifications and responsibilities of the role. Otherwise we are limiting or reducing our ability to accomplish our aims. At a more personal level, if we are in a role that we are not qualified to fill, that can be an uncomfortable experience, sometimes even a scary one.

An important exception is when we nominate someone for a role in order to build capacity in our circle. Our reasons for nomination will include that we want more circle members to be able to fill that role well. We don't want to be dependent on the one or few people who already can fill it well. We are nominating someone less qualified, so that they can learn how to fill the role well.

A key cultural shift in sociocratic elections is understanding that objections are not personal. They are not attacks on me, or you, or our best friend – or worst enemy – as individuals, as whole people. Objections are fundamentally related to the ability of our circle and its roles to accomplish our aims, together. It's nothing personal!

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Designing Our Homes and Organisations by Gina Price

February 14, 2021

Human behaviour will work around poor design, but it does so at a cost!

I wanted the kitchen to be the centre of the house, where I could keep an eye on the garden, the children and comings and goings from the house. My husband wanted the kitchen to be a place where he could cook, without interruption, out of the flow of household traffic.

Beauty in Design

Good design accommodates conflicting needs. A good house design interacts with how the users really live, not how they want to live! A good architect can align a structural form to the users' hierarchy of beauty.

The architect took the floor plan of our timber worker's cottage and covered it with tracing paper. He re-designed the house by gliding his pencil over the plan. Thoughtfully, he nudged the lean-to kitchen into the neighbouring bedroom. Voilà! With a stroke of elegant genius the apparent conflict of our differing needs was resolved!

Twenty years later, our kitchen sits like a shortened stem of the letter T, jutting out from the dining and living area which form the top of the T. A wood stove with exposed stove pipe is located in the centre of the dining and living area. Family life circles around the wood stove, the kitchen produces food and the dining room table draws us together.

Home and Work

Structuring an organisation is like designing a house. The different types of rooms in a house are designed for different activities. Similarly, different parts of an organisation are designed for different tasks. A board will authorise strategic and financial plans, management will coordinate teams

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and support the flow of information, and a project team will design, construct and deliver a project. Each part has its own clearly defined domain of responsibility.

Before engaging the architect, we got advice from a consultant who claimed to practice Feng Shui design. She recommended moving the dining room to a small bedroom sized space, separated from the kitchen. Had we followed this advice, it is likely to have resulted in a lack of flow around food and eating together. Most likely, it would have been our family relationships that would have borne the cost.

Recently, I was working with an organisation that had separated a major and high risk project from the board. The major project was in the domain of a team responsible for small scale projects. That team answered to the management team, which in turn answered to the board. This meant it was difficult for the board to deliver appropriate oversight and authorisation to the project, and behavioural workarounds emerged. The organisational design was equivalent to positioning the dining room of a house beyond the bedroom!

The Price of Poor Design

Poor organisational design can lead to delays in project delivery, breakdowns in communication, disengagement and low morale. All of these come at the expense of personal relationships. Poor design wears down the fabric of relationships. Our interactions and behaviours are deeply influenced by the design of the built environment, and the design of the organisations we inhabit.

While human behaviour will work around poor design, it will do it in a makeshift way and usually at a cost. The cost manifests in the quality of relationships of the people living or working within the design.

Wear a Design Hat!

Do you recognise good house design when you see or experience it? Do you recognise good organisational design and how might you experience that? I hope you will put your design hat on and think about your home and the organisations in which you participate. How does good design, or not so good design, impact you? What might you do to improve the design of your home, or your organization.

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Spaghetti Night: Mothering With Consent by Francine Proulx-Kenzle

January 17, 2021

A typical conversation around our dinner table among our four teenagers: "Can I have the car tonight?" "My teacher is the worst!" "You'll never believe what happened to me today!" My clan around me, sharing a meal together after a busy day, I felt fulfilled. Amidst the chit-chat, our second son Jeremy says "I'll stay to eat the salad, then I'll leave. I don't want to eat that meat stew!"

Shocked, I said "Come on Jeremy! You can't mean that, you know how important family time is." Jeremy sighed "Mom, I've been thinking about becoming a vegetarian. I've been reading about it and it's making sense to me. And you know I never liked meat much." While this was true, it wasn't the meat piece that I was having trouble swallowing.

Inhaling deeply, I thought about the training I was taking on consent decision-making.

How could I turn this into a win-win?

I took a chance, asking the family if they would humour me by trying an experiment. The teenagers rolled their eyes in unison; however, no one objected. There was hope, I thought, as I explained the process.

"Jeremy will present his idea of being excused from family dinners and being a vegetarian. Everyone will get a chance to ask questions in a round, one at a time, to clarify the idea. We will then express our reactions to the idea in another round, sharing what we think. We'll then do a consent round where we say either, yes – we can live with it or no – we have an objection." Everyone seemed ready.

Questions flowed and Jeremy answered them: "What does a vegetarian eat?" "Are you going to be a vegetarian for the rest of your life?" "Are your friends vegetarian too?"

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Feeling clear, we listened to each other's reactions. "It's hard for me to imagine, I'm a meat & potatoes guy" said the first. "It doesn't matter to me" said the second and "Now I know why you eat so many sunflower seeds!" said another. "I'm sad," I said, "because this changes our tradition." "I'll miss your stories," said my husband.

I facilitated a consent round. "No objection" came from my husband and two children. The youngest did have an objection: "I don't like the idea of having an empty chair at the table, it's not right." It was my turn, and I also had an objection: "This proposal threatens the quality of our family connection, and the family bonding we get from sharing meals together."

Now the job was to resolve objections. Suddenly, I felt scared and vulnerable. The issue was close to my heart, it mattered. With unease and tension in the air, I took another deep breath. "OK family, what are we going to do?"

"Well," said the oldest "we all like spaghetti. Instead of having it once in a while, why not have it regularly, on Wednesdays." Jeremy jumped in, "With a meatless sauce. I promise to show up!". "That's doable!" I said. My husband looked at me as I added "and for the other nights of the week, I'll be sure to have a vegetable side dish and a green salad."

The energy shifted around the table as Jeremy nonchalantly presented his revised proposal. "The weekly menu will include a vegetarian meal every Wednesday, let's call it 'Spaghetti Night,' and we will all show up for that."

We were smiling as I asked for objections. Everyone shook their heads as the youngest piped up "Remember Jeremy, there's always veggies and salad the other nights!" Jeremy chuckled. "Right" he added, "so I'll show up the other nights to check the veggies and salad!"

I was surprised and relieved. It worked!

With this simple process, together we found a practical and fair solution to meet all our needs.

We accommodated Jeremy, everyone was heard, and I knew I could count on the whole family being together at least once a week.

Establishing spaghetti night laid a foundation which we have used in facing issues as a family.

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It was a springboard for me becoming a sociocracy consultant. It also showed me the value in hearing everyone's views and that I don't need to be the mother telling my children what to do.

Sadly, Jeremy is no longer with us. Spaghetti nights live on, however. They are a family tradition, keeping Jeremy present in our hearts.

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Dare to Share the Lead by Erin Young

December 16, 2020

"…our ability to be daring leaders will never be greater than our capacity for vulnerability." ~ Brene Brown

Courageous leadership is a core mandate of Brene Brown's 2018 book Dare To Lead, as described in this October 2020 episode of her newly launched Dare To Lead podcast.

Vulnerability is at the heart of the matter.

Brown describes the courage-building skill-set required of leaders in a complex, rapidly changing environment. 'Rumbling with vulnerability' is at the top of the list.

The other courage-building skills include living into our values, braving trust, and learning to rise.

Fear isn't the primary blocker to daring leadership, Brown assures. Fear is the armour worn for the cause of self-protection. This armour looks like the thoughts, emotions and behaviours utilised when one is not willing to work with vulnerability; that is, when one is not willing to embrace uncertainty, risk and emotional exposure.

The parallels between self-managed organizations and what Brown describes as courageous leadership are hard to ignore. However, self-management involves shared leadership where all organizational members engage in some sort of leadership capacity. So how do self-managing organizations dare to share the lead?

Here is a deeper dig into the links between brave leadership with the adaptive, effective processes of the Sociocratic Circle-organization Method (SCM) [1] as a self-management method:

Rumbling with vulnerability
In the SCM, a meeting's facilitator has a key responsibility in holding uncertainty, risk and emotional

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exposure in the group. The person in the facilitator role changes after a given term, with a new person chosen by consent of the group. This builds group capacity for the role, as well as trust.

Being genuine in reaction rounds [2] can be very vulnerable; yet it is essential. Each team member is a key sensory 'receiver' and contributor in a team circle. When the circle has genuine input from each member, no matter how raw, it then has relevant information to work with.

Living into our values

Transparency happens in circle rounds, where each person has clear space to share their questions and responses. The circle knows why someone is holding a role, for example, because they equally participate in a well-informed consent process to select that person.

Effectiveness occurs when policies are actively reviewed and measured to ensure they're still good enough and safe enough. It is fed by the coordination of expertise by semi-autonomous teams who decide how to do the work they know how to do. Effectiveness is seen in the simple and comprehensive decision-making processes that gather information and understanding.

Equivalence occurs when members know they have a place to contribute, without interruption, in determining how the team will do its work. Transparent documentation allows all organization members opportunity to be informed, and therefore more capacity to contribute. Teams carry 'authority' over their aim and domain – their area of expertise – knowing they won't be trumped by a 'higher authority'.

Braving trust

It requires trust to allow semi-autonomous teams to determine how they do their job in achieving their aims which contribute to the organizational mission.

'Trust the process' is a common phrase in many practices, just as much as in the SCM. Leaning into the consent decision-making processes to support humanness as things get messy, confusing or overwhelming provides a powerful guide toward clarity, care and momentum.

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Trusting the meeting facilitator to hold the process well means team members are then available to tap into their problem-solving and creative capacity with more clarity and less distraction. Equally, trust is placed into all circle members to 'hold' meeting processes by contributing to the meeting flow as appropriate and necessary.

Learning to rise

Where leadership is shared – that is, when people own their place as 'leaders' in collaboration with others – they are more willing to contribute. More contribution means more ideas, more perspectives, more information, more creativity and more ability to go above and beyond what is imagined to be possible, especially in times of crisis.

Further, a healthy and living collective intelligence develops through circle processes, where the need to be 'boss' is replaced by allowing people to be actively involved in a coordinated way in leading the organization. This weaves greater adaptability, creativity and response-ability to the organization as a whole.

The world is in a time where daring leadership is a necessity. Unlocking vulnerability, values, trust and evolution by sharing leadership in our organizations provides agency to both individuals and the collective. This creates something much greater than the sum of its parts. By daring to share the lead through using the SCM, teams learn to operate with more adaptability and effectiveness, helping their organizations ride through the storms and evolve their contribution to this beautiful, complex and rapidly-changing world.

[1] See whitepaper "5 Pitfalls of a Top-down Hierarchy and What To Do About Them" by Sheella Mierson, Ph.D. for a general introduction to the Sociocracy Circle-organization Method.
[2] A key step of processing a proposal with consent decision-making. Rounds provide facilitated contribution from each team member, one by one, without interruption.

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Your Best Self, Virtually by Sheella Mierson

August 19, 2020

We're all spending so much time in online meetings, that it's worth a little effort to use a virtual platform in the best ways we can. Here are some tips.

You probably already know that it can help a meeting if everyone has their video on when possible (see key #2 in 7 Essential Keys for (Virtual) Meetings that Rock for more about this), and also if people mute their microphones when other people are talking to cut down on background noise. What else can you do so that others can see and hear you well?

The specific examples here are for Zoom, with which I am most familiar, but most of this section should apply to any video conference platform. Special thanks to David Goad (David Goad Show and David Goad Speaks) and Shelley Golden (How to Look Your Best on Zoom) who taught me most of these tips

1. Position of your camera

Pay attention to where your video camera is located relative to where you look at people's faces on the screen. There are several things to check for here:

- Where do you appear to others to be looking? You may appear to be looking down or to the side, rather than directly at them. The way to improve this is to change the position of your camera if you can, or to move things around on your screen so their picture is closer to your camera. If you are using a desktop or laptop computer, you may be able to move things on your screen by sizing the screen differently, or moving the screen vertically or horizontally. You can try playing with the display by switching between gallery view and speaker view, or by "pinning" someone's video. It can be helpful to ask for feedback from another participant; ask them if you appear to be looking at them.

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- Do others see your ceiling in your picture? If you are using a laptop and it is on your lap, you are looking down. To the other participants, you will appear as you would if they were looking up at you; they will see your ceiling, and maybe part of your nostrils! (Of course if you are in a room with a slanted ceiling, your ceiling will appear in any arrangement.) You want to mimic the look of sitting at the same height in a room together, which is a peer relationship physically. If you are using a laptop, place it on your desk or a table, and possibly even raise it up from there, so that the camera is approximately at your eye level.
- Where does your face appear in the box frame on the screen? To allow others to view your head, shoulders and arms, your head should be near the top of the box. The recommended space between the top of your head and the top edge of the box is four finger-widths. You can check this by folding in your thumb and holding out your four fingers horizontally above your head, with the bottom finger resting on the top of your head.

2. Lighting

Adjust the lighting in your room so that people can see your face well. If you are backlit, it will be hard for them to see you – your head may be outlined with your face completely in shadow. You may need to turn on a light or two in various parts of the room, or to shine a light on your face. Again, ask for feedback from a friend or colleague looking at you on the screen. Try different lighting possibilities and ask them which they like best. It can be hard to see this looking at your own picture on the screen.

3. The good news

There is some good news in holding meetings virtually. Some meeting aspects can be easier than in person, face-to-face: (a) People sometimes find it easier to be attentive and present in a virtual meeting. For example, since I am looking at one speaker or at that person and a few others only, it can be easier to focus. (b) We have the option to use an online document for minutes that are visible during the meeting. (See key #6 in 7 Essential Keys for (Virtual) Meetings that Rock for more about this.) If we do, I can read the minutes if my attention has wandered or I need to refresh my memory on something

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we discussed. (c) One colleague of mine is sensitive to an overabundance of nonverbal signals from participants in a face-to-face meeting. She finds that a virtual meeting reduces the number of signals to which she needs to pay attention. The result is that she experiences less overload than in face-to-face groups of people.

4. Your own video
One thing more about Zoom: it is possible to hide your own picture from your view, while the other people will still see you on their screens. To do this, click on the 3 dots in the upper right-hand corner of your picture, and select "hide self view." This does two things: (a) It saves the space on your screen so that you can focus more on other people, and possibly gives you another way to move their pictures closer to your camera. (b) It avoids the distraction of looking at your own image. We are not used to looking at ourselves when we are talking with other people in person. A colleague told me recently that he gets less Zoom fatigue when he hides the self view. Otherwise he is constantly checking to see if his hair is straight, or the camera is aimed correctly, etc. Apparently our eyes and brains do that a lot unconsciously, and it takes a lot of our attention and energy. So I am starting to train myself to turn off the self view.

Resources

- David Goad, David Goad Show.
- David Goad, David Goad Speaks.
- Shelley Golden, How to Look Your Best on Zoom.
- For facilitation, training, or coaching for online meetings, see Your Meeting Coach.
- For more information about meetings, see ABC's of (Virtual) Meetings that Rock.

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Prepare in Advance for Meetings that Rock
by Sheella Mierson

August 1, 2020

In ordinary times, meetings can run the gamut from dismal to invigorating. There is possibly even a wider range in this time of economic upheaval and physical distancing, when many of our "normal" practices for productive meetings are disrupted. Now with so many virtual meetings, how do we keep some of the spirit and function of those effective meetings? And even improve them from there? Here are some ideas to do just that.

The previous blog listed ideas to do during a meeting. This one has ideas for in advance of a meeting. All apply to both virtual and in-person meetings.

The first two ideas are part of preparation for any policy meeting. The second two require meetings themselves to make group agreements.

Separate policy and operational meetings

Here is something you can do that is simple and yet most groups neglect it. Separate policy meetings and operational meetings. Policy decisions are agreements about how the group will do their work, including how they work together. Individuals or teams make operational decisions within the guidelines set by those policies. Put an issue on the agenda for a policy meeting if you want the whole group to have input and be in on the decision. In an operational meeting, people may report on what they are doing and what they need from others, rather than all being in on every decision (Buck and Villines, 2017; Mierson, 2019). The group's facilitator leads policy meeting processes. The group's managerial role – CEO, department manager, team lead, or committee head – leads operational meetings.

Here is an example. A team or a company might have a policy for how they name computer files. Individuals

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then name the files they create, following the naming convention in that policy. If everyone makes up their own file names without a commonly-agreed scheme for that, it can be hard for anyone to find a file. And if you need a meeting with everyone weighing in to name a given file, you would have little time or energy for much else.

Hold policy meetings and operational meetings at different times. If scheduling is easier for the two to take place during the same meeting time when people are together, complete the policy meeting, take a short break, and then hold the operational meeting – or vice versa. Experiment to determine whether you prefer policy and operational meetings at separate times or back to back.

Prepare a clear agenda

Most policy meetings go better if someone prepares and distributes the agenda in advance. That way someone has (ideally) thought through each part of the meeting, and others can come prepared. For each item, state

1. The issue.
2. The process you will use and the desired outcome. Do you plan to do picture forming only? Do you want to create a proposal? If you are starting with a prepared proposal, who will present it? Do you want a decision in this meeting? If you include that information in the agenda, participants know what to expect and can be better prepared; they may also be more relaxed.
3. The time allotted for the agenda item. To improve your ability to estimate the time needed for agenda items, either the secretary or someone else can record the actual time for each item, to compare to the allotted time. With practice, your estimating ability will become more accurate.
4. Who makes this decision and by what method?

Few things are more frustrating than to be part of a discussion of an issue thinking that everyone there will make the decision together, when an executive or manager is really making the decision and your discussion is input. Either way is fine, as long as it's clear from the outset.

Will one person make the decision? Will the whole group decide, and if so

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will they do that by majority vote, by consensus, or by consent? All this needs to be clear in advance. The group decision-making method I like the best is consent (Buck and Endenburg, 2012; Buck and Villines, 2017; Mierson, 2019). Consent considers everyone's perspective. Majority vote, by contrast, can ignore up to 49 percent of the voices. Consent can also eliminate endless discussion that can occur with consensus.

Choose the facilitator

The group can explicitly choose one of its members to be facilitator for policy meetings. You can choose the person in the manager role or a different member of the group. Make the selection for a defined period of time, such as four months or six meetings, during which time the group gives the facilitator feedback as part of the closing rounds. Then choose a new facilitator, again for a set period of time; it might be the same person or it might be someone different. Avoid the temptation to rotate facilitators every meeting. You want a term long enough for the person to receive feedback and improve their skills. The group can choose the facilitator by consent – see discussion in the previous section of how to make decisions.

Have a clear focus for the meeting and for the group

For a policy meeting to be focused and productive and lead to the least unnecessary tension, it's important first for a self-managed team to have a clear focus. In the Sociocratic Circle-organization Method (SCM), that means two things for any part of the organization, beyond a single policy meeting:

- Define and all agree on the aim(s). The organization needs an aim(s), and so does each division, department, team, committee, etc. An aim is
    - a product or service that you offer
    - defined in terms that the client understands
    - distinct from other aims (Buck and Villines, 2017).
- Define and agree on the domain of authority and of responsibility of the team. In the SCM, the domains of authority and of responsibility coincide, and reside with the team doing that particular work in the organization. I.e., the people

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doing the work make the decisions about how to do it (Mierson, 2019). Every area of work in the organization needs to be under a group's domain, and only one group's domain. Gaps or overlaps in domains are recipes for things falling between the cracks, duplication of effort, and/or for friction.

For a team, the agreement about their aim and domain must be among all the members of the team, and also with the next broader level of the organization (Buck and Endenburg, 2012; Mierson, 2019). Clear aims and domains (Buck and Villines, 2017) can prevent tension and conflict and wasting time in meetings. One way clear aims do that is that they are the basis for making consent decisions about proposals (Buck and Endenburg, 2012; Buck and Villines, 2017; Mierson, 2019).

To recap:

Preparation is key. Hold separate meetings for policy and operations. Write a clear focus for the group and a clear agenda. And intentionally choose your facilitator for a determined number of meetings to build capacity within the team.

This is the second in a two-part series, and is an excerpt from ABC's of (Virtual) Meetings that Rock.

Resources for further learning

- For help with online meetings, see our Responsive Online Teams coaching & training packages.
- For information on sociocracy, see 5 Pitfalls of a Top-Down Hierarchy and What to Do About Them, a white paper about sociocracy.

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- John A. Buck and Gerard Endenburg, 2012, The Creative Forces of Self-Organization.
- John Buck and Sharon Villines, 2017, We the People: Consenting to a Deeper Democracy, 2nd edition (Washington, DC: Sociocracy.info).
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7 Essential Keys for (Virtual) Meetings that Rock by Sheella Mierson

July 21, 2020

Remember in-person meetings? When we would be in the same physical room with in-the-flesh people? If we're fortunate, we had meetings where people established trust and rapport, respected and were curious about each other's ideas, and thought creatively together. Or maybe meetings were occasionally like that, or we hoped they would be.

Now with so many virtual meetings, how do we keep some of the spirit and function of those effective meetings? And even improve them from there? Here are some ideas to do just that. Most will apply to both virtual and in-person meetings.

The ideas here are to do during a meeting. Ideas for in advance of a meeting will be in a separate blog. Of course all the ideas benefit from planning them in advance.

1. Have a designated facilitator

The facilitator ensures that the group follows meeting processes to which they have agreed, and where everyone hears each other's voices. Vagueness about who facilitates a meeting can lead to messy results. Sometimes in the name of equality groups avoid designating who is leading the meeting, and hope for the best, and occasionally that can work. But if there are topics to discuss that are emotional for participants, that strategy can come crashing down around their ears. You may have been in a meeting where the group was discussing a controversial issue. Perhaps it was hard for people to respectfully take turns and listen to each other. Or the process fell apart because people focused on the issue and few paid attention to the process. When one person has the job to guide the meeting processes, there is more likely to be structure and safety for everyone to take part.

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All that is true for both in-person meetings and virtual meetings. In a virtual meeting, where we can see fewer nonverbal signals, clear direction is even more important.

2. Ask people to turn their cameras on

In a virtual meeting, the group is missing many of the nonverbal signals on which most of us rely to communicate. When we can see everyone on the screen, some of those nonverbal signals become accessible (David Goad, see references). This is important for the facilitator and for all the participants in the meeting. Of course, this requires that people turn on their video cameras. An explicit request from the facilitator may be helpful here. So can an agreement about this among all the members of the group. An exception is if you move from one room to another and carry your device with you. In that case it is courteous to turn off your camera temporarily for the benefit of participants who may get motion sickness from the movement!

It's best to request in advance for people to have their cameras on. That way they can make sure that they and their surroundings are presentable.

3. Use a round

Do some people talk a lot and others very little or are even completely silent? Use a round. Everyone has a chance to speak in turn, without group dialogue. A round is useful for a variety of agenda items. Do it to generate ideas about a sticky issue. Or to ask clarifying questions about a presentation or proposal. Or to give quick reactions to a proposal. From one round to another, vary who starts and/or speaking order. Be sure to include yourself as facilitator, either first, last, or in the middle of a round.

If you are new to using rounds, you may think, "How could we make time for that?" The paradox is that rounds save time. Creative ideas surface sooner. People listen more generously since they know they will also have a turn. Quiet people can hold as much sway in the meeting as the vocal ones. Everyone relaxes as they get more experience with the process and grow to trust it. New ideas, productivity, and connections energize the participants – even in a virtual meeting.

To make sure everyone has a chance to speak, an alternative is a guideline that says everyone can speak once before anyone else speaks twice, and

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everyone can speak twice before anyone else speaks four times. This is better than some people never having a chance to speak at all, but to me doing a round is even better. Something in me relaxes when I know everyone will get a turn to speak. Otherwise I need to get the attention of the facilitator to get my turn. And the facilitator has to determine who has had more or less time to talk – a process that can be affected by their own unaware biases.

I can sit back and really listen when others are speaking, rather than wonder when to request a turn for myself or plan what I will say next. All this means we can listen to understand new ideas, rather than listen to figure out how to prove someone else wrong.

Rounds provide an environment that helps people think (Kline, 1999). They can make a group smarter. Groups of people have a "collective intelligence," a so-called "c-factor," analogous to "general intelligence" for individuals. The more equality there is in distribution of conversational turn-taking, the higher a group's collective intelligence (Woolley et al., 2010). Rounds increase that equality (Mierson and Schinnerer, 2020).

If it is your turn to speak in a round and your ideas have been said, you can say "Pass," or "My ideas have been said," or "Nothing to add." You will be doing the whole group a favor. In the absence of rounds, some people – myself included on occasion – talk more than necessary when they can. I have noticed that using rounds seems to make it easier for people to speak more briefly or even to pass. They know that they will have plenty of opportunities to speak and to be heard.

4. Call on people

As a facilitator, call on people in a round. When doing a round in an in-person meeting, you can say who speaks first and then go around the circle or the table and it's clear whose turn is next. That's less clear for an online meeting. It's easy for two people in an online meeting to start talking at once or to have a long pause until someone starts. The facilitator directing the show avoids either of those. If your meeting is in Zoom, everyone sees the faces in a different order on the screen; it's good to cue people so the order is clear.

Even better, in a virtual meeting call on people two in advance. Say, "Let's hear

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from Jerome next, and then Francesca." That gives Francesca time to anticipate turning her microphone on if it muted.

5. Check in and check out

Start the meeting with a check-in in your opening round. Each person in turn says how they are doing. This gets people connected and present and generates energy, leading to a more productive meeting. A check-in is valuable in person, can be even more so in a virtual meeting, and more so yet in the midst of a pandemic. It can help make mutual understanding more likely during the meeting. Suppose someone is in a bad mood because a family member is in the hospital or a child was up all night or they just narrowly missed being in a car accident. They can say so. If they are then short with others during the meeting, we may be less likely to take it personally because we have information about that person. And sometimes being able to say what's going on helps the person be present. As facilitator, vary the wording of the opening question from one meeting to another – it's fine to be creative with this. The result is that we increase the likelihood that participants in a meeting can show up with their whole selves. The more they show up that way, the more connected, rich, and satisfying a meeting is likely to be.

End the meeting with a check-out in the closing round. Each person in turn says (a) what went well in the meeting and (b) offers suggestions for improvement. Both can be about the meeting as a whole, and/or about the facilitation. This check-out keeps people connected at the end and provides feedback on the meeting so that the group can keep improving. If as a facilitator you tried something new and you want feedback on that specifically, ask for it in the closing round questions. If you know at the beginning of the meeting that you will be trying something new, you can even tell people then that you will ask for feedback at the end. A closing round helps the whole group take responsibility for meetings going well, rather than solely the facilitator.

6. Take minutes right in the agenda

In many policy meetings, someone takes minutes, types them up later, and sends them out as an email attachment. Other meeting participants read the minutes and send in corrections. The secretary (or whoever is doing it) sends out a new version of the minutes. Everyone

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needs to re-read the minutes to see if the secretary adopted their changes, and if they have any changes for the latest version. There may be multiple versions floating around, and everyone needs to be sure they are looking at the same version. Someone needs to store the corrected version in a place where people can find it. And only the final version is the one you want for future reference.

There is an easier way. Put the agenda in a place where everyone can see it during an online policy meeting. That could be in a Google Doc, or the company's intranet, or whatever common platform you use for your documents. The secretary writes minutes in that document, and inserts the minutes for an individual agenda item right under that item. Other attendees can watch the person typing in real time if they wish. After the meeting, others can make suggestions or comments in the document, for the secretary to accept or reject. There is nothing to send out, and everyone is looking at the same document.

It is common to have a separate document for each policy meeting. Better, put all the agendas and minutes for a calendar year in one document. It is then much easier to find a discussion of any particular topic; merely do a keyword search in that year's document. Start a new document for the next year.

7. Pay attention to the heart

I've saved one of my favorite ideas till last. Spend a few minutes, preferably early in the meeting, to make emotional connections among the participants. This is especially important in a virtual meeting, where we are missing the bodily communication signals that we usually process below the level of awareness. An opening round with a check-in is one way to do that at the beginning of a meeting. A check-out in a closing round can do that again at the end. In the opening round you can include appreciations of each other or the group, or a gratitude practice, or a guided visualization to bring everyone present and into connection. One form of this latter is HearthMath Quick Coherence®; studies at the HearthMath Institute show that when a team gets into coherence at the beginning of a meeting, their meetings are more productive with better decisions. What could be cooler than that?

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There is some good news in having all these virtual meetings. Some aspects can be easier than in person, face-to-face. (a) People sometimes find it easier to be attentive and present in a virtual meeting. For example, since I am looking at one speaker or at that person and a few others only, it can be easier to focus. (b) We have the option to use an online document for minutes that are visible during the meeting. (See key #6). If we do, I can read the minutes if my attention has wandered or I need to refresh my memory on something we discussed. (c) One colleague of mine is sensitive to an overabundance of nonverbal signals from participants in a face-to-face meeting. She finds that a virtual meeting reduces the number of signals to which she needs to pay attention. The result is that she experiences less overload than in face-to-face groups of people.

Here are questions I like to ask myself about a group's meetings:

- Do people speak candidly? Or do they say what they think others want to hear?
- Does everyone have a chance to speak? Or do some people do most of the talking and others barely get a word in edgewise?
- Do new and creative collaborative solutions emerge? Or do people take polarized positions with little progress toward solutions?

Hopefully the ideas in this article will help you answer the first of each of those pairs of questions positively.

This is the first in a two-part series, and is an excerpt from ABC's of (Virtual) Meetings that Rock.

Resources for further learning

- For help with online meetings, see https://sociocracyconsulting.com/responsive-online-teams/.
- For information on sociocracy, see 5 Pitfalls of a Top-Down Hierarchy and What to Do About Them, a white paper about sociocracy.

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Share Hard Decisions to Effectively Navigate Trying Times by Erin Young

April 7, 2020

As the COVID-19 pandemic unfolds many businesses are being forced to make hard decisions. Not only are teams working remotely, leadership is triaging financial bleed through staff layoffs and restructuring.

In many companies with a traditional top-down organisational structure, managers alone make these decisions without broad team consultation. Workers lower on the ladder have little say about what happens to their job, their team, and the company for which they work.

In addition to the effects on individuals who are laid off, these changes have large impacts on the business as a whole. Staff loss immediately means lost experience and knowledge. Restructuring can be disorienting and creates productivity lag.

These impacts are even more dramatic when workers have little opportunity to contribute to the best next steps.
Here's why.

Critical perspectives and feedback are ignored – The knowledge and awareness of leadership teams and managers only goes so far. Frontline on-the-ground workers have perspectives different from those higher up. Leaders and managers may be working with partial understanding of processes while carrying multiple responsibilities – blocking their real-time awareness of what's happening in the organisation. They miss out on creative ideas on how a team might minimise staff cuts. The team is now at lower capacity, grieving sudden shifts, and needing to be doubly productive. This is a recipe for overwhelm and overload.

Heavy responsibility about staff cuts can be traumatic – Having to decide who loses their income in an environment of escalating

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unemployment rates is hard. Especially when staff are well-regarded co-workers and colleagues. If these decisions have to be made on a broad scale, the emotional impact can be great. Concentrating decision-making about the many on just a few managers is a heavy burden to bear. This then can negatively impact the managers' capacity to make clear and appropriate decisions for the whole, potentially creating more problems to resolve down the line.

Opportunities for emergent response to crisis are lost – When times are tough, creative and unexpected ideas often emerge as a critical piece for moving forward in an appropriate way. Every person in a company potentially carries creative ideas and possibilities that could benefit the business' movement forward. By not having frameworks to harness this creative energy, teams and companies suffer, losing out on opportunities that lead to different and more productive outcomes.

When the USA's Creative Urethanes(1) went through the 2008 global financial crisis, they were pushed to the limit. With sales down 50% and the CEO Richard Heitfield shocked and immobilised by the situation, the employees sprang into action creating a plan that everyone could accept.

Success stories from hard decisions shared by Creative Urethanes at this time give a sense of the positive outcomes. For example, their management-employee group discussed who should stay and who should be laid off. People said things like, "If I leave, it will be tight for us for a while, but my last child has finished college and we will be okay. Whereas Joe, here, has a new baby, and needs the income from this job". The people who were laid off came back to visit for periodic coffees with the people still working there.

Similarly, the Netherland's Endenburg Elektrotechniek(2) achieved positive outcomes by sharing hard decisions in 1976. The Dutch shipping industry shut down rapidly due to an international oil crisis, impacting the half of Endenburg Elektrotechniek's workforce who were working on ship electrical systems. A machinist in the company's specialized fabrication shop had an idea for another solution besides layoffs for his shipping colleagues. His idea went through the linked circles to the Board, who valued the approach with modification and agreed to

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immediate action. The shipyard electricians were trained with a crash sales course, and went out in suits and ties to drum up more business. The business stayed afloat – maintaining skilled workers, diversifying their client base, and generally emerging stronger as a result of the crisis.

Adaptive and responsive approaches are critical in times of crisis. Effectively embracing creativity within and throughout teams is invaluable. Doing this with transparency and equivalence for those involved provides psychological safety and system safeguards to ensure care for both individuals and the greater organisation.

Processes and structures reliably serving these needs include consent decision-making, opening and closing rounds in meetings, representatives linking teams, and consent-based selection for people in roles. All of these increase collective intelligence to create decisions that are good enough for now and safe enough to try until more stable conditions occur.

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(1) See article, "US Employee Engagement a Mere 32%, But The Sociocracy Consulting Group Finds It Can Be Raised," by Sarah Lozanova (2015).

(2) See "We The People: Consenting to a Deeper Democracy," by John Buck and Sharon Villnes, 2nd Edition, Sociocracy.info (2017), pp. 60-61

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Motivation in Self-Managing Organization – It's Not About the Money by John Schinnerer

March 5, 2020

Dan Pink knows something about what motivates us. In this RSAnimate video he shares some surprising findings about what really moves us to perform better, to do our best, to stretch ourselves.

His most general finding is that for all but purely mechanical tasks – that is, for anything that requires a bit of conceptual or creative thinking – higher monetary rewards do not improve performance. In fact, they actually reduce performance!

Pink's research finds that when people are paid enough so that the issue of money is off the table – that is, so that they are thinking about the work, and not the money – more money does not increase performance. Instead, performance is affected by three primary factors: autonomy, mastery, and purpose. And, these factors improve personal satisfaction as well as work performance.
System designs for self-managing organizations would therefore be wise to provide adequate autonomy, mastery, and purpose for everyone involved. In particular, the Sociocratic Circle Method (SCM) is a mature and tested self-management system that implements these motivating factors in multiple ways.

Autonomy is our desire to be self-directed, to choose our own course. In a sociocratic organization, circles – equivalent to divisions, departments, working groups, committees, teams, and so on – have considerable autonomy. They make their own policy decisions within their domain of work – they decide how to best do whatever it is they do, as well as how to measure and improve their performance. They elect their fellow

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members to roles and tasks within the circle.

Contrast this with organizations where a team, group, department or division is “managed” by some other person or part of their organization. Their autonomy is considerably more limited, if they have any at all. They do not get to decide how to best do what they do – someone else tells them, and performance (as well as possibly morale and collaboration) suffers.

Mastery is, as Pink puts it, our “urge to get better” at doing things. This is, for humans, satisfying – or what we might simply call “fun.” We actually like a challenge, at least some of the time.

In a sociocratic organization, getting better at what we do is built into the organizational system. In a circle, we consistently measure and evaluate what we’re doing, and look for ways to do it better (whatever “better” means for us and what we do). This is true for a circle as a whole, and for each member of a circle.

These opportunities for mastery are further leveraged by the circle’s significant degree of autonomy. It’s not some other person or group that is telling us how to do what we do better – it’s us satisfying our own “urge to get better” at what we do. We may even contribute to mastery for others, by discovering some improvement in our work that can be adapted to what other circles are doing. And likewise they may contribute to our increasing mastery.

Purpose in an organization provides multiple benefits. For one, it attracts people who identify with that purpose, who have some similar idea of what is important and why. They are then working for more than just money – they are working for something they themselves “believe in,” thus often working with more commitment and energy.

There is empirical evidence aplenty that when profit and purpose get separated – or when profit is the only apparent purpose – businesses actually do worse, not better, financially and otherwise. Pink points out several ways this may happen, and readers can no doubt identify more from their own experience.

A sociocratic organization explicitly pays attention to purpose, through the organization’s vision, mission and aims. Each circle in the organization has clearly defined aims to which all circle

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members have consented. Collectively, the aims of the circles within an organization fulfill the organization's overall aims. In other words, everyone knows what the purpose of the organization is, as well as knowing their role in fulfilling that purpose. Aims are not abstract or vague – they are tangible products or services the organization produces or provides.

Structures and processes that provide members with autonomy, mastery and purpose are built into sociocratic organizations. Such organizations by their very nature invite us to do our best, to perform better, to excel at whatever we do as a part of them.

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How Safe is Your Team? by Francine Proulx-Kenzle

February 5, 2020

Would you be surprised that the research on workplace effectiveness addresses the value of psychological safety? The notion of "psychological safety," a term coined by Harvard Business School professor Amy Edmondson,1 has been researched extensively over the years.

Psychological safety in a work context relates to a person's perspective on how threatening or rewarding it is to take interpersonal risks within a team at work.2 And it goes beyond trust between two individuals; psychological safety involves the entire team. This type of safety is cultivated at the team level and becomes part of the organizational culture.

Psychological safety reduces the fear that colleagues will respond to one's new ideas with dismissal, ridicule, indifference, or other negative or disparaging reactions. This meets one's need to be heard and respected.

In either an apathetic or a toxic work environment, team members will lack engagement, often resulting in less-than-optimal decisions for the organization. In fact, people will withdraw, subtly or overtly, choosing to withold their best self out of fear of making a mistake or being seen as incompetent.

Work Environment Scenario – Take 1

Rebecca is part of a marketing team with six other people. She's come up with a new strategy and brings it up during a team policy meeting. "I'd like us to consider using the XYZ Social Media approach. From the results I've seen in other sectors, I believe it will make a positive difference for the company". Ron, in a condescending tone, cuts her off by saying: "Really Rebecca! Another flavour of the month. That's a waste of our time!" Another team member, Cheryl, rolling her eyes, chimes in with "Here we go again!" No other comments are made

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from the rest of the team. The facilitator goes to the next agenda item.

Now, imagine team members feeling "safe" enough to take risks and show vulnerability by initiating new ideas. Let's go back to our scenario where this time, the team uses the Sociocratic Circle Method (SCM).

Work Environment Scenario – Take 2

In response to Rebecca's proposal, the meeting facilitator says, "Let's start with a round of clarifying questions to Rebecca's proposal. Ron can you start?" Ron asks "How long of a trial period do you have in mind?" After everyone has raised their clarifying questions, the facilitator starts a reaction round. When it comes to Ron's turn, he says: "I'm curious to see how we can adapt this strategy for our company." And the rest of the team voices their reactions, each one in turn. The process continues with a round of objections; any raised will be used to improve the proposal.

SCM and Psychological Safety

You can see how the SCM can play a distinct role in fostering psychological safety. In the Take 2 scenario, Rebecca feels that her voice matters. She's encouraged to contribute ideas and give feedback, as is everyone on the team.

Used by diverse types of organizations, the SCM can implicitly and explicitly create psychological safety within a team. In a round, each person on the team gets an opportunity to speak up in turn, without interruptions or cross-talk. The result is that people listen to hear each other's ideas, rather than to figure out how they can prove their position right and someone else's position wrong. Consent-decision making is clearly defined with a round of clarifications, a round of quick reactions and a round of objections, in that order. And both the facilitator and the entire group receive training in how to do all this.

The values of equivalence, effectiveness and transparency implicitly create a culture shift. Imagine! Objections are seen as valuable feedback used to improve the proposed decision.

I like to think of psychological safety as creating a safe space, a safe bubble, where one is protected from toxic and negative influences or personas. In this

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safe space, a team member feels confident that no one on the team will embarrass or punish anyone else for admitting a mistake, asking a question or offering a new idea.

The benefits of instilling psychological safety in a work environment go beyond the positive and productive atmosphere it creates in an organization. Psychological safety helps individuals feel safe enough to broaden their minds and explore new ways of looking at the world at their own pace and style.

Fostered by the SCM, this feeling of safety shows up in positive mental health and well-being for each team member.

To read more about the Sociocratic Circle Method, see The Sociocracy Consulting Group's free white paper 5 Pitfalls of a Top-Down Hierarchy and What to Do About Them by Sheella Mierson.

To learn more about sociocracy and the SCM, and how it aligns with psychological safety, schedule a free introductory consultation.

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1. Dr. Amy C. Edmondson, Harvard Business School
2. Wendy Hirsch, Science For Work article 2018

5 Pitfalls of a Top-Down Hierarchy and What to Do about Them – Part 1 by Sheella Mierson

January 15, 2020

The structure of a top-down organization, standard during the industrial age, ill-suits a world with fast-paced change. An alternative is the Sociocratic Circle Method, a whole-systems approach to decision-making, governance, and project management. It creates more inclusive, resilient, and effective organizations where all stakeholders have a voice in the policies that affect their work.

This is the first in a three-part series.

The structure of a top-down, command-and-control organization was standard during the industrial age. This approach has many pitfalls for us in an age of rapid technological innovation and ever-increasing amounts and sources of information (Responsive Manifesto, see Sources). Some organizations have attempted alternate structures, with varying levels of success. The top-down structure has staying power because most of us grew up with it so it is familiar, and also because it offers advantages for efficiency and accountability. Some of the attempts at alternatives have led to flat structures. Those can lack a place for leadership, which is important for efficiency and accountability. The method we describe here, the Sociocratic Circle Method (SCM), preserves the benefits of both types of structure: strong leadership and collaborative decision-making.

Pitfall #1. Communication goes one-way

Jane, the head of her company, tells Fred, a direct report, what to do on a project to be completed. He then tells Francesca, who reports to him. She has to carry out the order and make it work.

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Figure 1 represents this conventional structure. For a straightforward job and predictable conditions, this can be an efficient way to get work done. But what happens when Francesca knows in advance that the job will take three times as long as was budgeted, or that the results will conflict with other processes the company is using? Or the job proceeds as planned and within two weeks Francesca notices an unforeseen consequence that could sabotage the organization's goals? How does the organization shift course?

Gerard Endenburg faced this dilemma when he became CEO of Endenburg Electrotechniek, an electrical engineering company in Rotterdam, Netherlands. He looked at the traditional organization chart and thought, "I am an electrical engineer. I know about power systems. I would never design a power system this way. There is no feedback, so you can't steer it."

That dilemma led him to develop the SCM beginning in the early 1970's.

Pitfall #2. The person who makes the decisions creates a bottleneck

Back to that example above. Suppose Francesca knows of difficulties at the outset of the project, and passes the word up through channels to Jane. But what if Fred misrepresents Francesca's ideas, or Jane is overloaded with information and decisions that day and doesn't listen? Or if Jane has less technical expertise than she realizes and doesn't know how to work with the new information?

Distributed leadership helps avoid both pitfalls #1 and #2. Distributed leadership pushes decisions out to where the work is done, so that the people doing the work decide how to do it.

In the SCM, each group of people who work together meets periodically for a circle meeting, where they set policy to guide their work and day-to-day operational decisions. In those meetings, the people meet as equals, setting aside whatever operational hierarchy they have – more about that shortly.

The challenge then is coordinating the work of groups in various parts of the organization. Otherwise the organization trades top-down control for potential chaos.

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The solution is to have both top-down and bottom-up communication. Figure 2 shows a possible circle structure that corresponds to the linear structure in Figure 1.

Allowing people to make policy decisions that govern their own work, with double-linking between circles, takes care of aspects of pitfalls #1 and #2.

Let's also look at the decision-making method that the circles use. We want to ensure everyone has a voice – otherwise Francesca's voice can still be ignored. In the SCM we use consent for policy decisions, including to set strategy and to select people for roles; see Figure 3.

Additionally, avoiding the bottleneck of solely top-down decision-making is supported by having information and communication in the organization being transparent, where people in all circles can see the meeting minutes. Jan Carlson, former head of Scandinavian Airlines and a pioneer in customer service, said, "An individual without information cannot take responsibility, but an individual who is given information cannot help but take responsibility" (Willett, 1999).

"When I was an enlisted man in the Navy, I wondered why the officers didn't listen to our good ideas. When I became an officer, I wondered why I could never get the enlisted men to tell me what they were thinking. I tell you from experience that sociocracy solves this problem from both ends."
– Richard Heitfield, President, Creative Urethanes, Inc., Winchester, VA, using sociocracy since the 1980's

This post is an excerpt from a full white paper on this topic. This part of "5 Pitfalls of a Top-Down Hierarchy and What to Do About Them" describes how one-way communication reduces effectiveness and works against natural laws in flow of power. It also describes the benefits of pushing decisions out to those doing the work, avoiding the pitfall of a communications bottleneck.

Parts 2 and 3 will describe further pitfalls: #3, Management and workers become adversaries; #4, Workers disengage; and #5, The organization loses sources of information and creativity.

Thanks to Sharon Villines and Erin Young for editing assistance with this series.

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5 Pitfalls of a Top-Down Hierarchy and What to Do about Them – Part 2 by Sheella Mierson

January 31, 2020

This is the second in a three-part series, and is an excerpt from a white paper by the same title.

Part 1 listed two pitfalls of a top-down organization: (1) one-way communication, and (2) decision bottlenecks. Here are two more.

Pitfall #3. Management and workers become adversaries.

We all know of companies where relations between management and workers are less than optimal. A company can lose collaborative creativity and a lot of time and money settling disputes. In extreme cases, when management and workers take sides on a polarized issue, workers might even strike.

In the Sociocratic Circle Method (SCM), management and workers make policy decisions collaboratively and transparently, joining forces to devise solutions that will work for everyone. Both meetings and method of decision-making are designed so that all voices are heard, and to help the group jointly craft new solutions. Part 1 of this series discussed the decision-making method when setting policy, and Part 3 will discuss more about meetings. In The Netherlands, where the SCM originated, the law requires companies with 30 or more employees to have a workers council, similar to an in-house labor union in the U.S. This requirement is waived for companies run sociocratically, because the SCM creates a collaborative relationship between management and workers and protects workers' interests better than the councils (Buck & Villines, 2017).

Case Study

Endenburg Electrotechniek, an electrical engineering company in Rotterdam, Netherlands, designs,

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manufactures, and installs heavy-duty electrical equipment. In the late 1970's, a local shipyard suddenly shut down, unable to keep up with competition from the Japanese shipbuilding industry. That wiped out almost all of Endenburg's Boat Department's business overnight, and the Board decided to begin laying off most of the Boat Department. A machinist in the Assembly Department had an idea for another solution – to send the members of the Boat Department out in suits and ties and bring in the Sales Department to give them some crash sales training. His idea went through the linked circles [see Part 1 in this series] quickly; the Board made a few adjustments to the proposal and consented to it. Three weeks later the company had enough new business that they cancelled most of the layoffs, and the company diversified its customer base and was stronger. The company still exists today. (Buck & Endenburg, 2012; Buck & Villines, 2017.)

Pitfall #4. Workers disengage.

According to a 2018 Gallup poll, only 34% of workers in the U.S. feel engaged, while 53% of workers do not feel engaged (Harter, 2018). This represents a huge loss both to companies and to all the individuals involved, since engaged workers are more creative and productive and lead more fulfilling lives. In the SCM, those doing the work in any part of the organization make decisions about how they do the work. Employees who feel their voices are heard are 4.6 times more likely to feel empowered to perform their best work (Beheshti, 2019). Similarly, employees involved in decision-making are more engaged (Stark, 2010; Whitehurst, 2016). And organizations with engaged employees outperform those with low employee engagement by a whopping 202% (Kanapi, 2017).

User Comment

"We adopted sociocracy and all of a sudden there is a room full of empowered people helping make decisions. People feel different. I'd say that at the end of 100% of our circle meetings – where we set policy – everyone says, 'My goodness. I feel so much more energized.' We have fewer meetings over time as we've implemented sociocracy, the decisions are better, and the follow-through is better because everyone's on board."
– Paul Kervick, Outreach Coordinator and Board Member, Living Well Residential Care Home & Assisted

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Living, Bristol, Vermont, using Sociocracy since 2004

This part of "5 Pitfalls of a Top-Down Hierarchy and What to Do About Them" describes how management and workers can become adversaries in a top-down hierarchy, and how workers can disengage when they are outside the decision-making process. It also describes the benefits of collaborative decision-making when everyone in the organization is involved. Next, part 3 in the series will describe an additional pitfall, that of the organization losing information and creativity with solely top-down hierarchy, and how putting all the pieces together makes it possible to steer an organization collectively.

Thanks to Sharon Villines and Erin Young for editing assistance with this series.

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5 Pitfalls of a Top-Down Hierarchy and What to Do about Them – Part 3 by Sheella Mierson

February 14, 2020

This is the third in a three-part series, and is an excerpt from a white paper by the same title.

Part 1 and part 2 listed four pitfalls of a top-down organization: (1) communication goes one-way, (2) the person who makes the decisions creates a bottleneck, (3) management and workers become adversaries, and (4) workers disengage. Here is the last of the five pitfalls, and then a discussion of how to put it all together to steer an organization.

Pitfall #5. The organization loses sources of information and creativity.

In a natural system, every part of the whole has information needed by the rest of the system. In the human body for example, every cell senses information that can affect what happens in other parts of the body. The endocrine system, the nervous system, the gut, and the other organ systems all talk to each other. If the body were to ignore the information from any part, the result could be damage, disease or death. This also applies at the organ level for the body, and at the cellular level within an organ.

Likewise, our human organizations have rich sources of information among their own members, if only they can access it. We need the perspectives both of the people at the head of the organization, who have the job to think about the whole company and the long-term strategic objectives, and of the people on the front line, who know what they need to do their work and are likely closer to the customer. Perhaps in the past, when external conditions have been more stable and predictable, we could get away with static, top-down organizations. The pace of change is so rapid now that our organizations

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need new ways of adapting and responding. The old predict-and-control no longer suffices. And all the challenges facing humanity require the intelligence and creativity of people in all parts of our organizations to create positive impact. The Sociocratic Circle Method (SCM) provides a way to access this creative intelligence. See Case Study and User Comment #1 below.

Case Study

Rainbow Community School, for pre-schoolers through 8th graders in Asheville, NC, had a culture of encouraging input from all stakeholders – teachers, staff, students, and parents. Yet structurally and legally, decisions rested on the shoulders of the Executive Director. When they began implementing the SCM, it was as though a breath of fresh air blew through the place. Teachers started taking initiative with all sorts of creative ideas. The circle structure with clear aims and domains made it clear who had responsibility and authority for what, and people no longer needed permission to take action. The result was to unleash an entrepreneurial spirit, to the benefit of the students and their parents. A decade later, the school's enrollment and size of the campus had more than doubled, with a reputation as an innovative community leader.

User Comment #1

"Since we've adopted sociocracy, it's much easier and more efficient for me to delegate. I'm able to receive information from the staff, the faculty, and all the different committees in a much more efficient fashion. I can't tell you how much more enjoyable my job is."
– Renee Owen, Executive Director, Rainbow Community School, Asheville, NC, using sociocracy since 2009

Putting It All Together to Steer an Organization

If every decision required a meeting to consent to a policy, work would progress slowly. So the SCM distinguishes between policy and operational decisions. Policy, to which a circle consents, guides day-to-day operational decisions. For day-to-day work, the linear structure is in place, for efficiency and accountability. For making policy decisions, the circle structure is in place. We go back and forth between the structures in Figures 1a and 1b (below), and get the best of both worlds. And meetings for policy

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and meetings for operational decisions are separate.

We need two more pieces to steer an organization: feedback loops for continuous improvement, and clear processes for meetings and decision-making.

Feedback Loops

Every policy becomes an experiment for a set a time period and includes measures. The goal of the policy is clear at the outset, as is how long to conduct the experiment and how to measure its success. At the end of that time period, the circle that created the policy reviews the measurements and evaluates how well the policy helps achieve the desired goal. They can then do one of three things: renew the policy, change it, or toss it out and start over. See Figure 2. Double-linking between circles creates another critical feedback loop, and means that information about the effectiveness of a circle's policy can come from anywhere in the organization.

Meetings

Meetings, while necessary, can be the blessing or the curse of any organization – and sometimes they are both. The SCM includes careful design of policy meetings to hear all voices in the circle, to make group decisions, and to continuously improve the meeting effectiveness. All circle members receive training to hold a circle meeting, and the meeting facilitator receives extra training. See User Comment #2 below. Meetings where all voices are heard and the group gets things done are a key part of being able to steer an effective, responsive organization.

User Comment #2

"Sociocracy has allowed us to have open-hearted conversations about emotionally-laden topics and develop policies we were not able to handle before. One visitor, new to sociocracy, was in awe of the trust and open communication in our meeting."
– Cynthia Kennedy, Founding Member, Open Floor International, using sociocracy since 2013

The Paradox of Self-Organizing Systems

Many leaders tend to think endurance and resilience of their organization come from imposing control on structures and processes. But with

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change so rapid, the old mindset of "predict and control" is an illusion. The paradox is that by transitioning from what may feel like control to self-organization, companies can become more flexible and resilient, and therefore more likely to endure in the long run.

The SCM is a whole-systems approach to decision-making, governance, and project management. It creates more inclusive, resilient, and effective organizations where all stakeholders have a voice on the policies affecting their work. See User Comments #3 and #4 (below). For the technically minded, the approach draws on cybernetics and systems theory (Buck & Endenburg, 2012; Buck & Villines, 2017). Self-organizing systems are adaptive and resilient rather than rigid and stable (Wheatley, 2006); a sociocratic organization is self-organizing. The SCM has been found to increase productivity and, where it has been measured, to increase it by 30-40%; it increases worker retention rates and reduces sick leave (Buck & Villines, 2017). It also enables companies to respond more appropriately to customer needs.

User Comment #3

"Sociocracy has made a big difference in Creative Urethanes' ability to withstand the economic downturn. We saw increased profits within the first year of using the method. Over time we have applied it to many areas of the company. As a result, we have better communication throughout the company, lower employee turnover, more energy in staff members due to increased involvement, more creative ideas that help us thrive in our industry, and continuous improvement within the organization. Best for me is I have more assistance – having everyone's help during hard economic times has lifted some weight off my shoulders."
– Richard Heitfield, President, Creative Urethanes, Winchester, Virginia, using sociocracy since the 1980's

User Comment #4

"Sociocracy shifts us away from the old command-and-control structures with which most of us grew up – structures that often fostered fear, control, and competition among people. What we have instead now is a system that fosters cooperation and trust, allowing room for a new way of working together. It's beautiful to witness."

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– Cynthia Kennedy, Founding Member, Open Floor International, using sociocracy since 2013

And what of Jane, Fred, and Francesca, our characters at the beginning of part 1 of this series? How do they benefit? Francesca has a voice in the decisions affecting her work, knowing that her ideas and skills matter. Fred is no longer caught in the middle between representing the boss to the workers and advocating on behalf of the workers to the boss. And Jane has access to information, ideas, and solutions beyond what she as one leader can devise on her own.

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Five Ways to Avoid Mistakes Facilitators Make That Can Ruin a Meeting by Sheella Mierson

January 2, 2020

We've all been to meetings that are a disappointment or even a disaster, and hopefully others that are a dream – where the group gels, people think creatively together, and the whole is greater than the sum of its parts. What makes the difference? Here are five ways to avoid mistakes that can tip the scales when you are the facilitator for a meeting – and tip them back again when you correct the mistakes.

1. Agreement about who is facilitator
The facilitator ensures that the group has clear processes and that everyone's voice is heard. Other people can help, but being vague about who is the facilitator usually makes things messy. It's a paradox. Having one person who is clearly in charge provides structure and safety for everyone to take part. Sometimes in the name of equality groups avoid clearly designating who is leading the meeting, and hope for the best. Occasionally that can work. If there are items to discuss that are emotional for participants, that strategy can come crashing down around your ears.

2. Advance preparation
It is possible to spend as long or longer preparing to facilitate a meeting as actually leading the meeting. When the facilitator prepares well, the payoff is enormous in terms of a sense of accomplishment and even pleasure at the end of a meeting on the part of all participants. There are multiple aspects to advance preparation. Here are a few:

a. Creating the agenda ahead of time. That includes identifying what even needs to be on the agenda and what is better handled another way or at a later meeting.
b. Distributing the agenda ahead of time.
c. Deciding on priorities if time runs short.

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d. Anticipating challenges. This can include challenges to you being the facilitator, dealing with people who tend to dominate the meeting, what to do when participants' emotions run high, and what to do when your emotions run high (yes, it will happen).

3. Clarity about how to handle each agenda item

This is part of advance preparation. For each item, it's helpful to think about

a. How to introduce it, and who will do that.
b. What process you will use to address it, and what outcome you desire. Do you plan to do picture forming only? Do you want to formulate a proposal? Do you want a decision in this meeting? If you include this information in the agenda, participants know what to expect and can be better prepared; they may also be more relaxed.

4. Feedback about the meeting

If you want continuous improvement in how the group functions in meetings, ask for – and make sure you receive – feedback in a closing round at the end of every meeting. Request feedback about the meeting as a whole and about the facilitation specifically. From time to time ask someone in the group to take notes and give you specific feedback on your facilitation afterwards, to help you grow as a facilitator. Mistakes happen; the trick is to learn from them. Following these suggestions will help you learn, so you can be your best self and bring out the best in your group.

5. Investment in developing yourself as a facilitator

Excellent facilitation is both a science and an art. It helps bring out the best in a group, so that the group can accomplish its purpose. Good facilitators make it look so easy that we may overlook what went into developing their skills. To expect that you will somehow know what to do in every situation in a meeting without training and practice would be like expecting that you could fly an airplane or play the flute without training and practice. Investing in developing yourself as a facilitator can pay off in every aspect of your life, and of course for the group that is fortunate enough to have you lead meetings for them.

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Leadership Habits of Strategic Organizations by John Schinnerer

December 11, 2019

This Inc.com article on leaders as strategic thinkers, by Paul J. H. Schoemaker, offers a framework for illustrating how to build strategic leadership into self-managing organizations. The article suggests six habits of "Adaptive strategic leaders – the kind who thrive in today's uncertain environment." It describes how those habits support a successful organization.
Schoemaker presents these habits as those of an individual. This is our common cultural bias – an idea of individual "heroic" leaders. Let's look beyond this bias, and examine how entire organizations are able to practice these habits of adaptive strategic leadership.

In self-managing organizations, leadership gets distributed throughout the organization. Why is this a benefit? Because with only one or a few individuals designated as "leaders," the organization loses, misses, wastes the leadership abilities of everyone else. When we enable everyone's leadership potential to emerge, we get higher quality strategic leadership.

How distribution of leadership happens depends on the particular implementaton of self-management. Here we are looking at applications of the Sociocratic Circle-organization Method (SCM), which provides practical means for systemic implementation of sociocracy in organizational structures and decision-making processes. The SCM is a meta-design system for self-leading, self-managing organizations. It offers robust structure and process to distribute – and cultivate – leadership.

The first habit Schoemaker identifies is "Anticipate," and he lists three actions to support anticipation. An SCM approach builds these actions into the organization itself. "Peripheral vision," as he describes it, exists throughout the organization. External experts are

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part of the organization's long-term high-level leadership team. They connect the organization with its environment, providing information, input, and feedback. Rather than relying on one or a few individual leaders, every member of the organization contributes to a habit of anticipation.

Schoemaker's second habit is "Think critically." We can do better than relying on one or a few individual "leaders" for all the critical thinking. An SCM-based organization encourages everyone towards thinking critically. Questioning entrenched ideas and re-framing problems – and solutions – is intrinsic to the SCM's consent-based decision making processes. A foundational value of transparency supports avoiding hypocrisy and manipulation. Objections to proposed decisions are a valued asset – they are feedback that may lead to better solutions.

"Interpret" is the article's third habit. Schoemaker writes that "A good strategic leader holds steady, synthesizing information from many sources before developing a viewpoint." This is exactly what a self-managing team, group, department, or entire organization does. Everyone whose work is affected engages with the issues at hand. This brings valuable diversity of input towards common goals. The synthesized viewpoint is gathered from multiple standpoints.

Schoemaker raises issues of "analysis paralysis" in the fourth habit – "Decide." In the SCM approach, self-managing groups work with available information and make "good enough" decisions for next action steps. They include measurement (feedback) and evaluation in each step. Iterative processes move towards what's next without waiting "forever" for what's needed now. "Perfection" is a journey rather than an end-point. Instead of imposing all this work on one or a few individuals, the SCM approach uses consent-based decision-making and transparency to leverage the abilities of all involved.

The fifth habit offered in the article is "Align." Here SCM-based organizations again step out of the box of "heroic" leadership. A leadership meeting works to fulfill Schoemaker's three key points relative to "alignment." There is no assumption that "total consensus is rare." Instead, the SCM applies a rigorous and efficient design process to achieve consent from those whose

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work the decision affects. A key contributor to this outcome is collective awareness of – and consent to – common aims that guide design – and re-design – of decisions.

Schoemaker's sixth and final habit is "Learn." To avoid feedback becoming less likely as a company expands, an SCM-based organization builds in circular feedback from the start. These feedback mechanisms scale automatically as an organization grows. This creates, by design, learning organizations. All feedback has value, and "failures" are simply one form of learning opportunity. Decisions and actions have feedback designed into them. The rate of feedback adjusts to suit current or anticipated needs. This is how a well-designed organization lives these six habits of "adaptive strategic leaders." The habits are built in, rather than depending on one or a few "heroic" leaders. All members of an organization contribute to distributed, organized, and effective leadership.

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