

Sociocracy 3.0

Patterns for

Self-organizing Teams

Who has heard of...

Sociocracy

Dynamic Governance / Circle Forward

Holacracy

Teal Organizations

Responsive Organizations

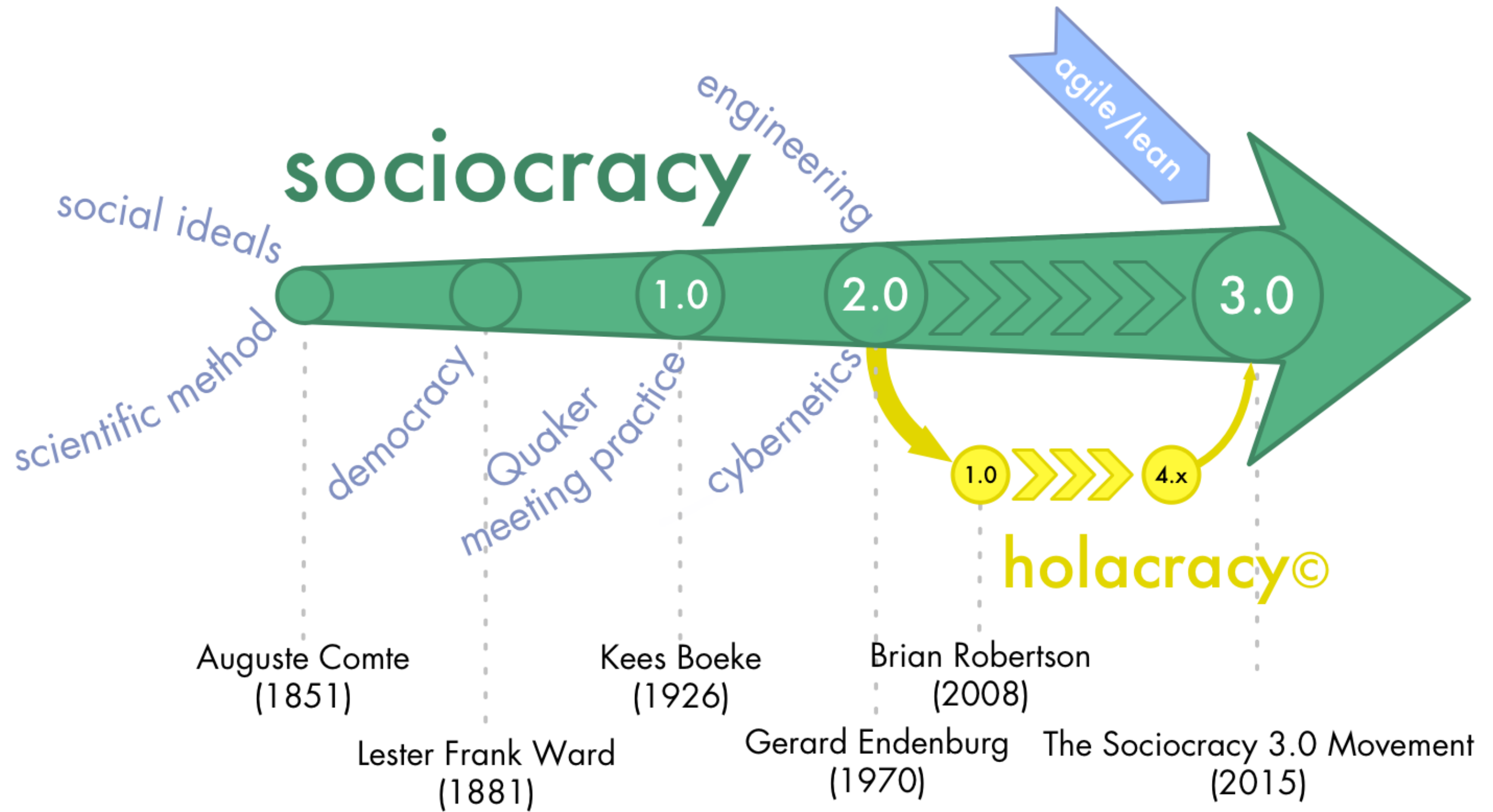
Intrinsify

New Work

Sociocracy 3.0: a framework of patterns for collaboration

**Agile redefined:
Sustainably creating
a valuable product
with happy people.**

A Bit of History



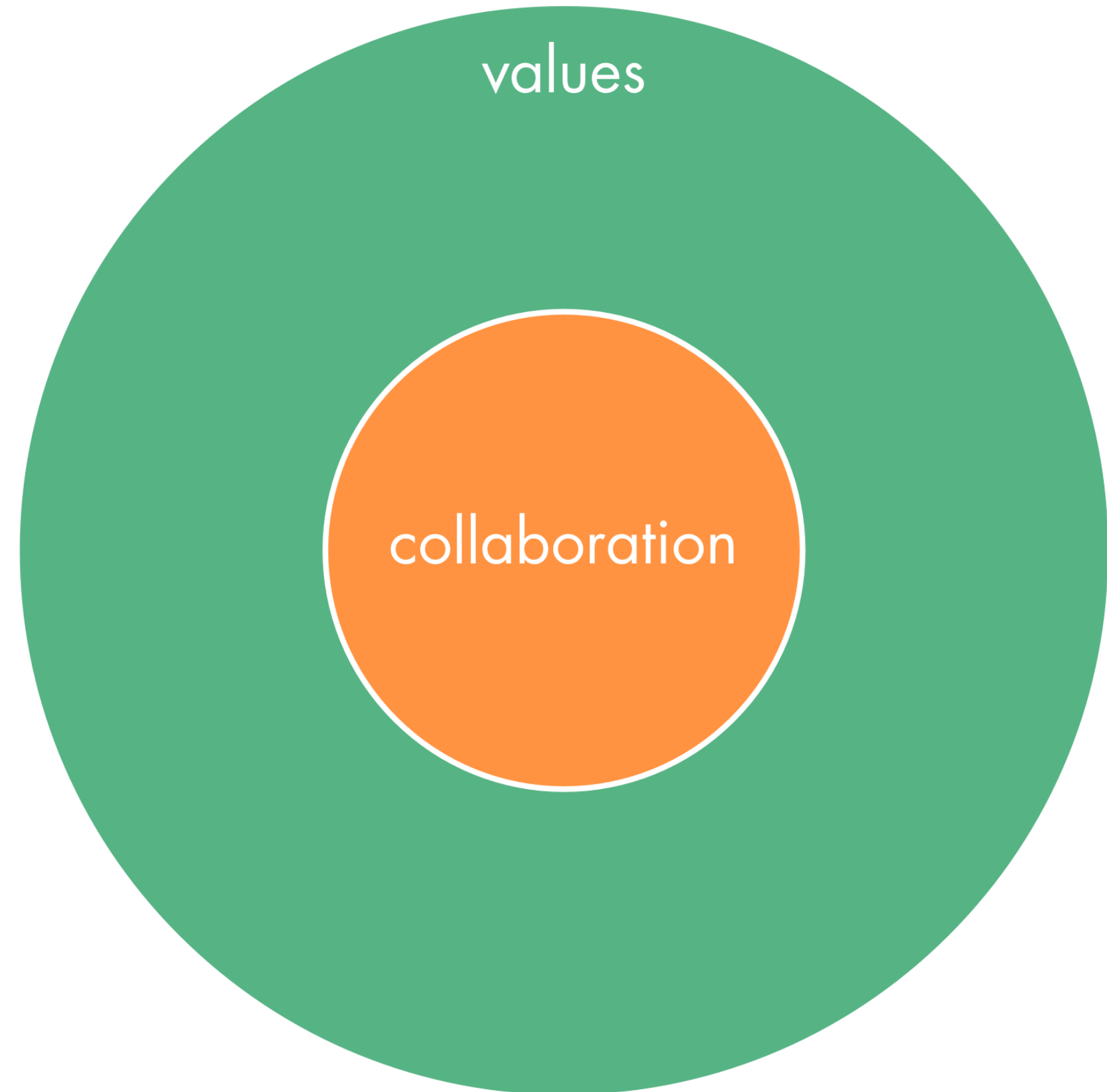
Design Goals



In a Team People
Come Together to
Collaborate



Shared Values Define Culture and Guide Actions

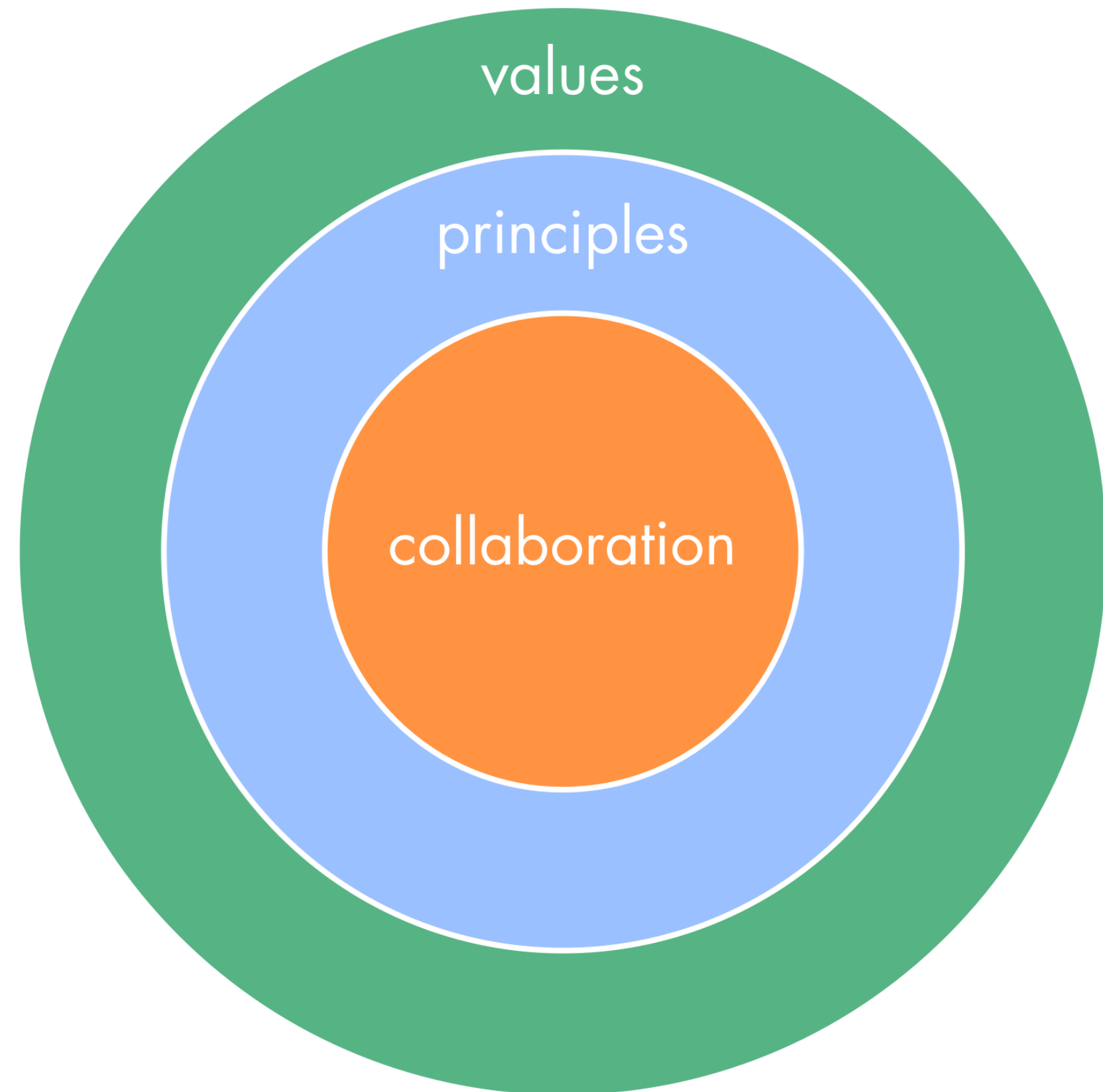


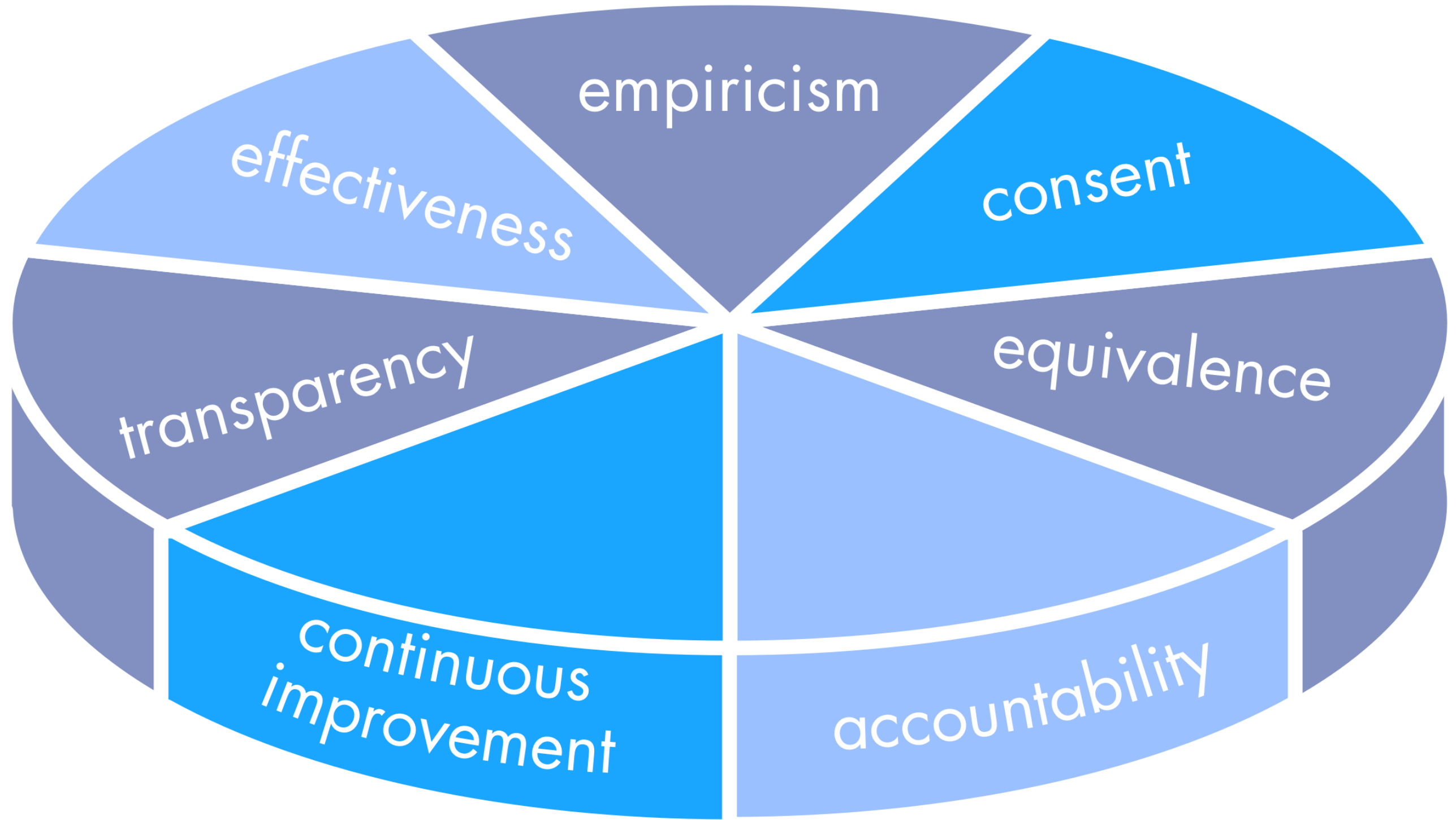
Values enable effective collaboration

- reduce **misunderstanding**
- **align** decision making and action
- **attract like-minded members, partners and customers**
- values should be subject to **regular reviews**
- values change, and we can choose to adopt values

Sociocracy 3.0's Principles

...are also values





Patterns for Collaboration

- pattern: template for successfully navigating a specific challenge
- principles facilitate adaptation of patterns to your context
- sources:
 - sociocracy
 - agile methods
 - lean production
- new patterns will be discovered ➤ also by you!

Circles and Consent

Circle

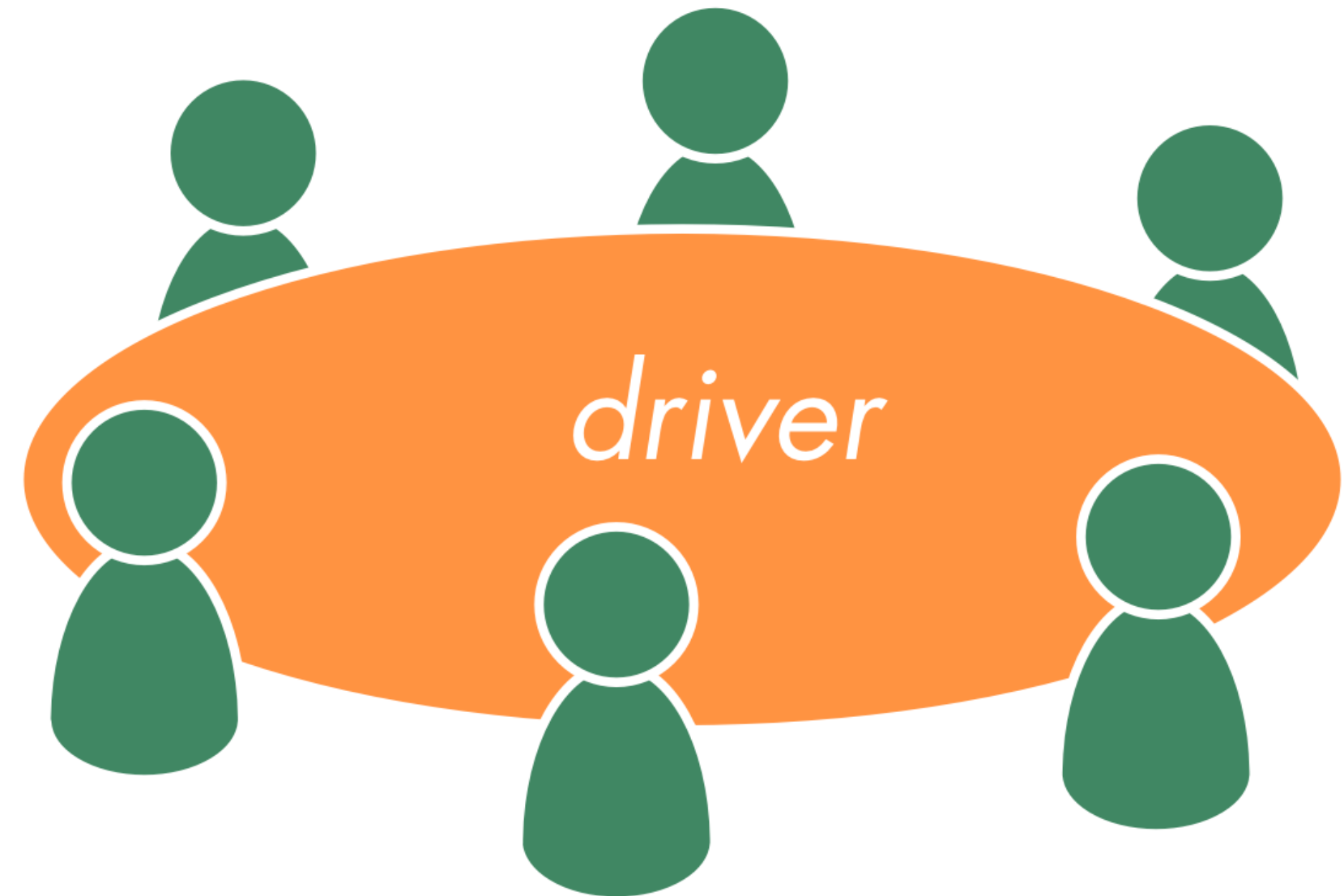
group of peers

self-organized

temporary or permanent

makes decisions by consent

in person or by delegation



Circles Make Better Decisions Than Individuals

- more knowledge
- more engagement
- more creativity
- more commitment

Self-Organization

Ability of an open **system** to spontaneously and **purposefully** **coordinate its elements** under appropriate conditions **Without** the Help of an **External Agency.**

Self-Organization

strategy | product | plans | contracts
role assignment | compensation | dividend
organizational structure | work process | values

Consent

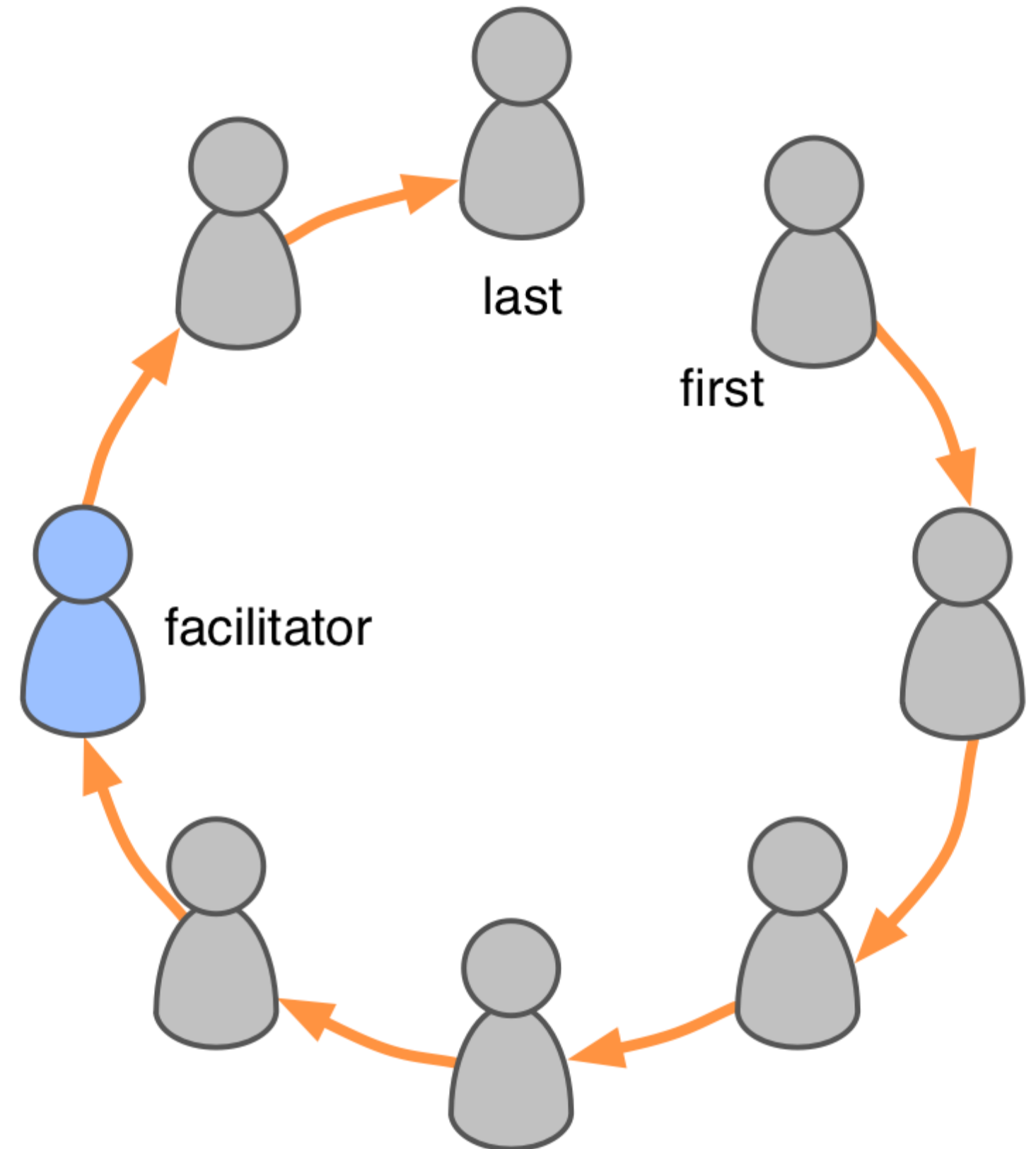
the absence of objections
everyone can **"live with it"**

good enough for now

safe enough to try

Maintain Equivalence: Avoid Discussion Facilitate Rounds

1. Pick a random person to start
2. Everyone speaks in turn



Evolving Decisions

We can already evolve Products,
Business Models and Work Processes.
Can We Continuously Evolve
Everything?

Let's Make Every Single Decision an Experiment

Identify Motivation

Design Experiment

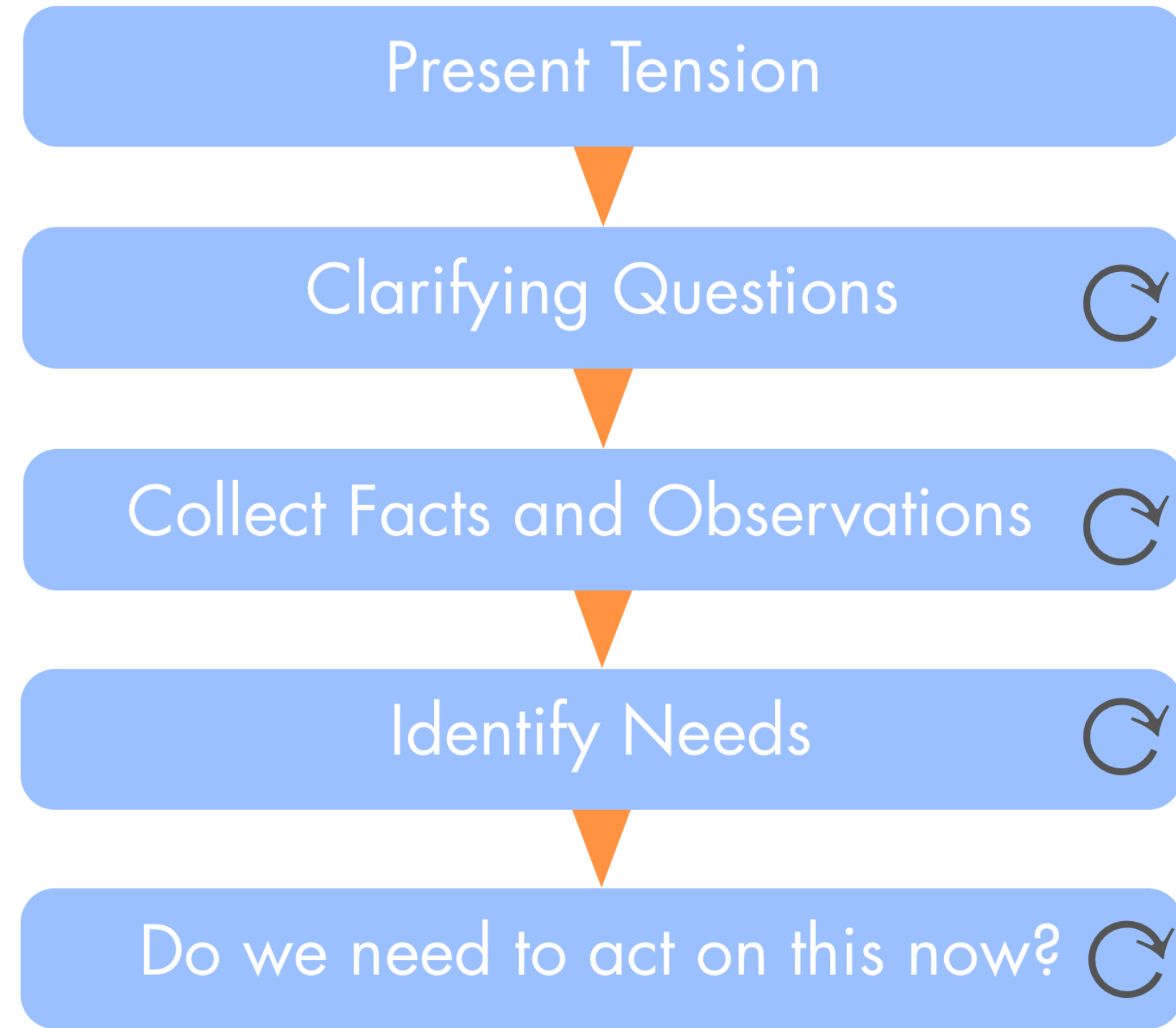
Commit to Run Experiment

Review and Evolve

1. Identify Motive

The Driver

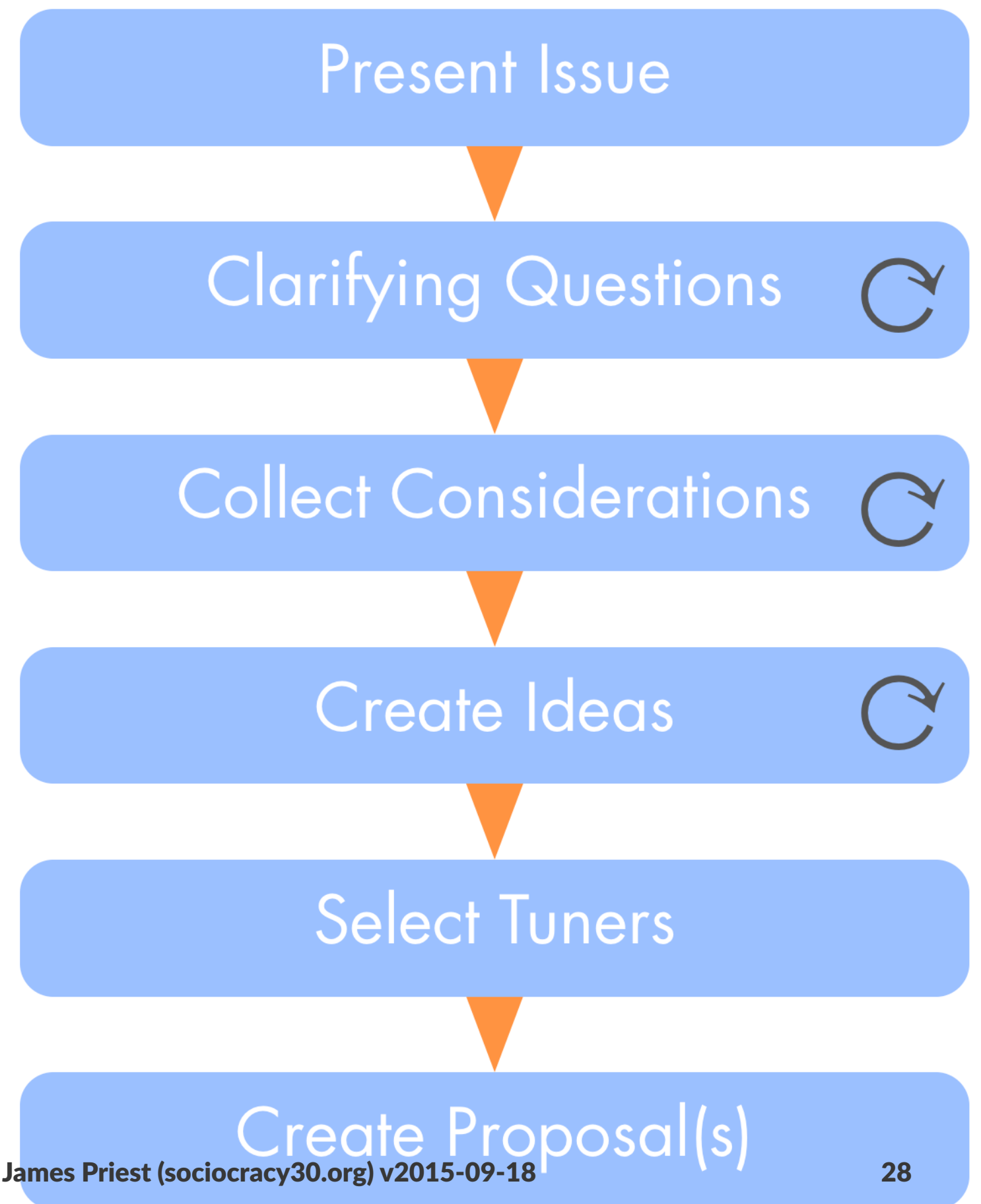
- shared motivation for action (the "why")
- situation ➤ needs
- focus on the present, not future or assumptions
- replaces goals, aims, mission, vision, purpose
- easy to review



2. Design the Experiment

Proposal Forming

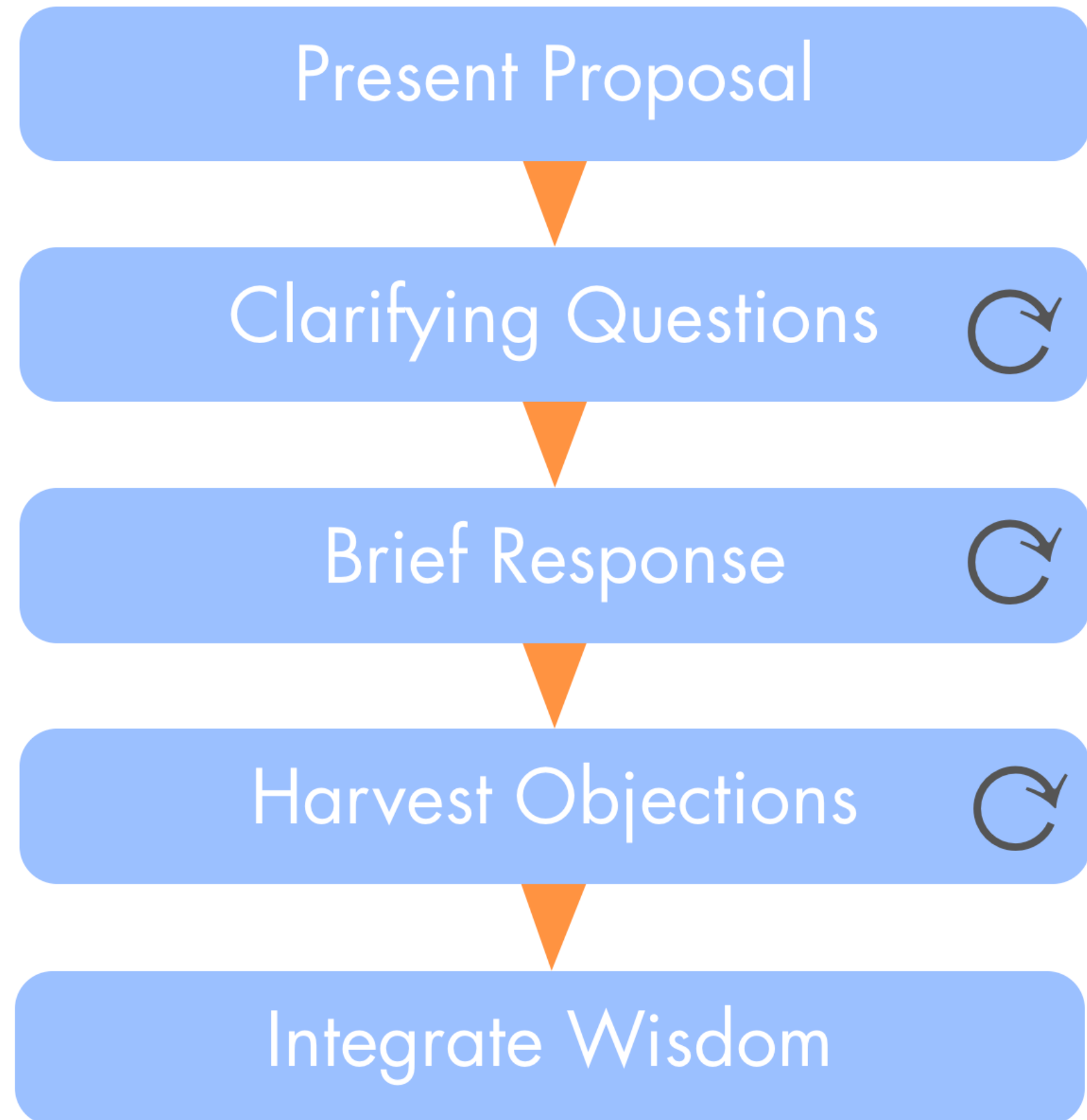
- collect considerations and ideas in larger circle
- create proposal(s) in small group



3. Commit to Run the Experiment

Consent Decision Making

- collect objections from everyone affected
- objections reveal knowledge
- can you "live with it" until the review?
- "contract of consent"



Validate Objections

- Does the objection relate to **this specific agreement**?
- Does this objection reveal how an agreement...
 - ...has **risks or negative side-effects**?
 - ...is in conflict with our **shared values**?
 - ...negatively affects **someone's ability to contribute**?
 - ...can be improved significantly?

Resolving Objections

- ask proposal owner
- ask member with objection to amend proposal
- facilitator amends proposal
- "How would you solve this" – round
- Brief Dialogue – 2 or 3 people
- refer to proposal forming
- drop the proposal
- Re-work – delegate back to another circle
- Form a temporary circle to review, research, revise

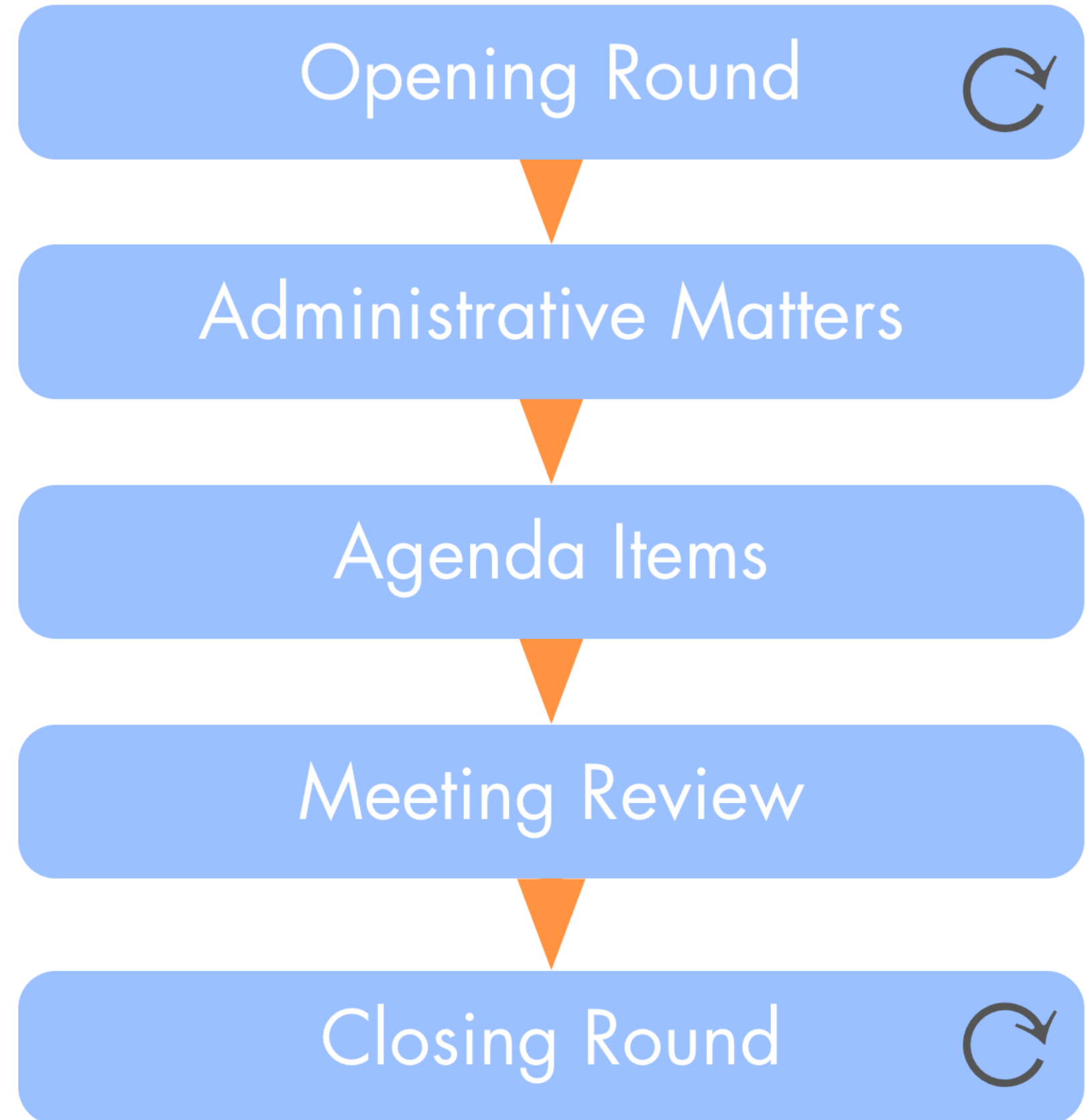
<h1>Title</h1>	
Date	Review Date
Driver	
[Redacted]	
[Redacted]	
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Description	
[Redacted]	
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[Redacted]	
Evaluation Criteria	
■	[Redacted]
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(Concerns)	
■	[Redacted]
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Appendix
Picture Forming
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[Redacted]
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Background Information
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Previous Versions
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References
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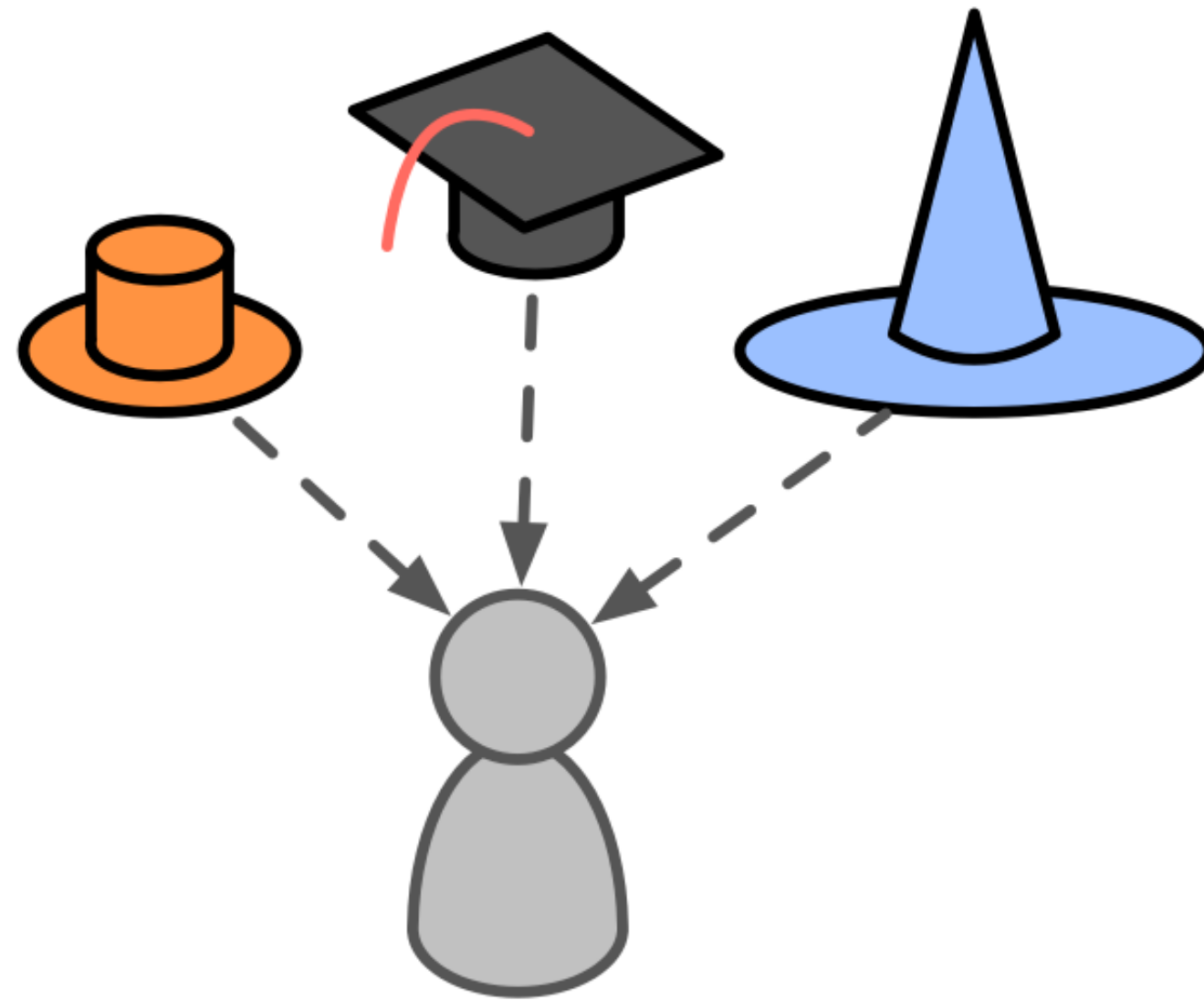
4. Review and Evolve

Governance Meeting

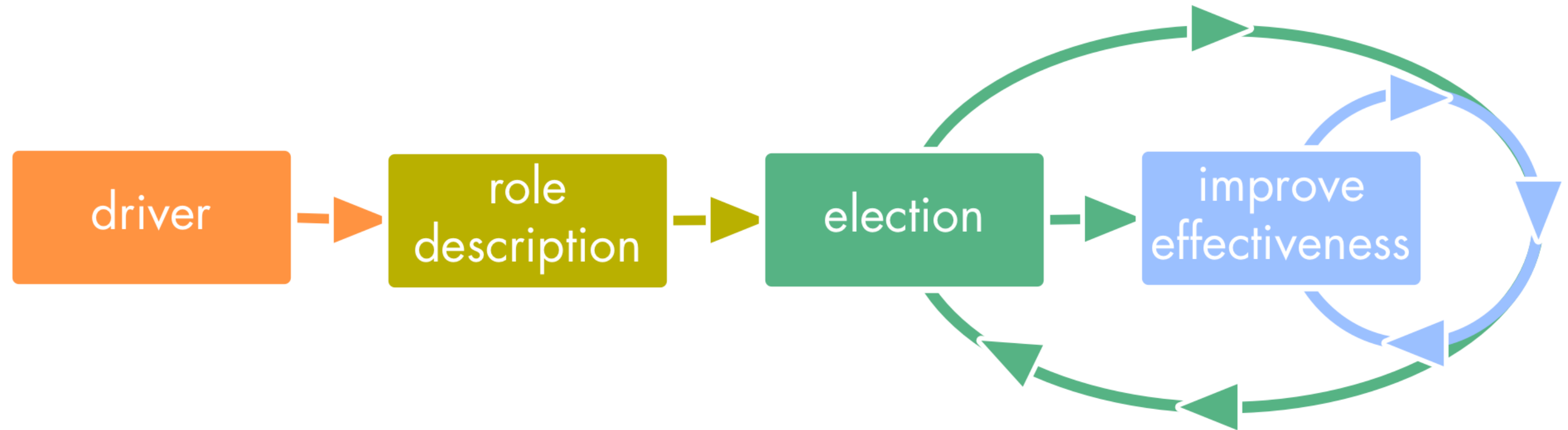
- circle meeting at regular intervals (2-4 wks)
- tensions may trigger early review of policy



People and Roles



Role Definition and Improvement



Common Roles

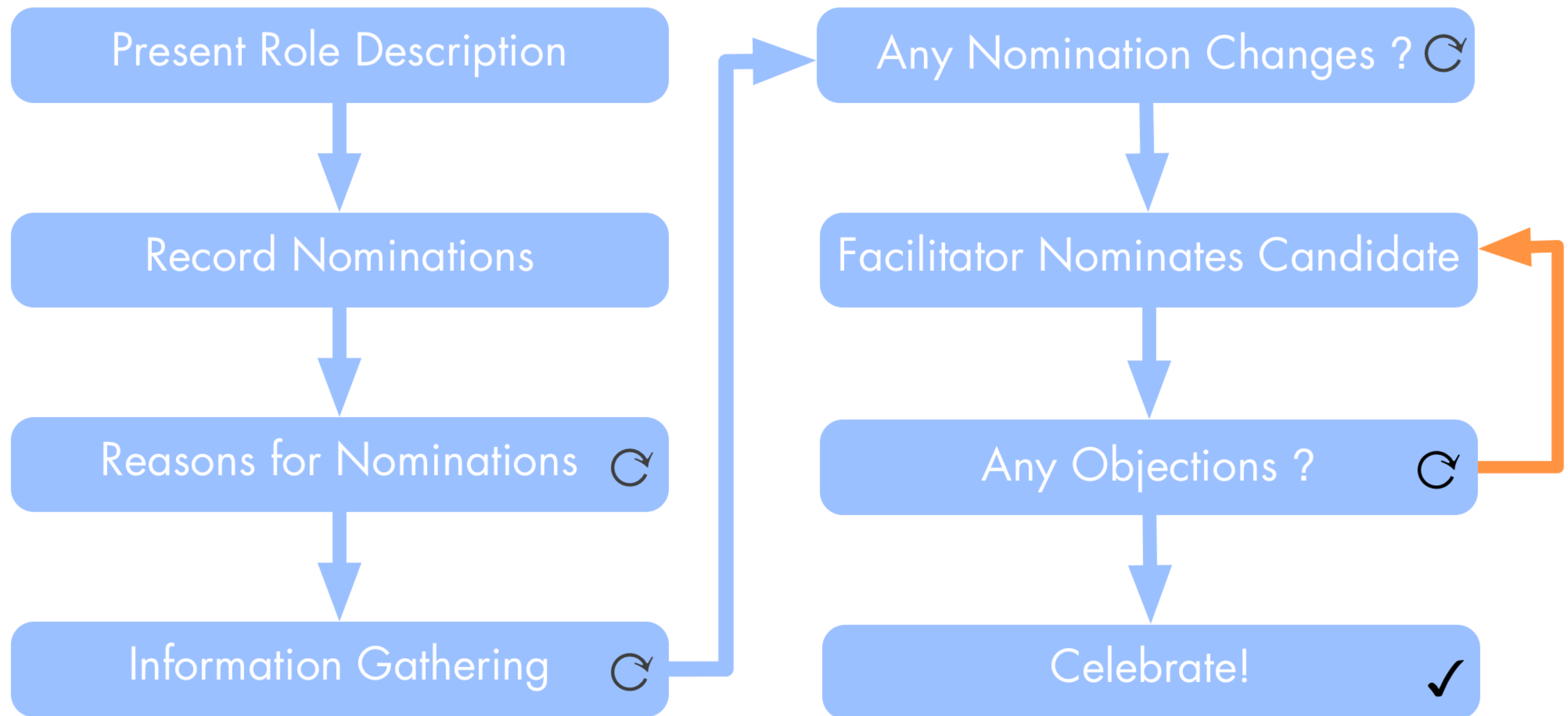
- facilitator
- logbook keeper
- meeting manager

Name of the Role	
Date	Term (date of next election)
Driver	

Responsibilities, Resources	

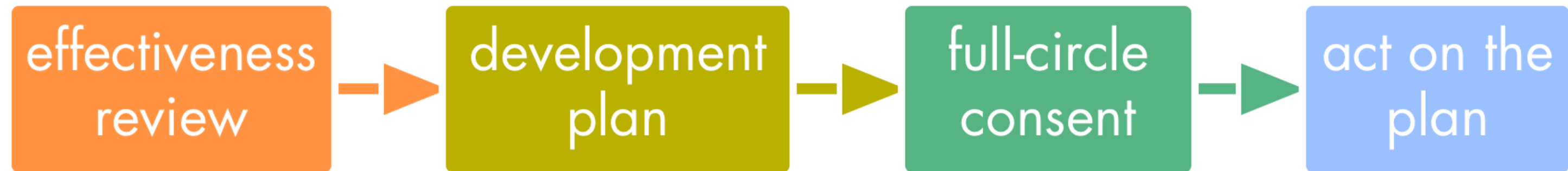
Skills, Experience, Qualities, Time	
■	_____
■	_____
■	_____
Cadence of Review	
■	_____
■	_____
■	_____

Election by Consent



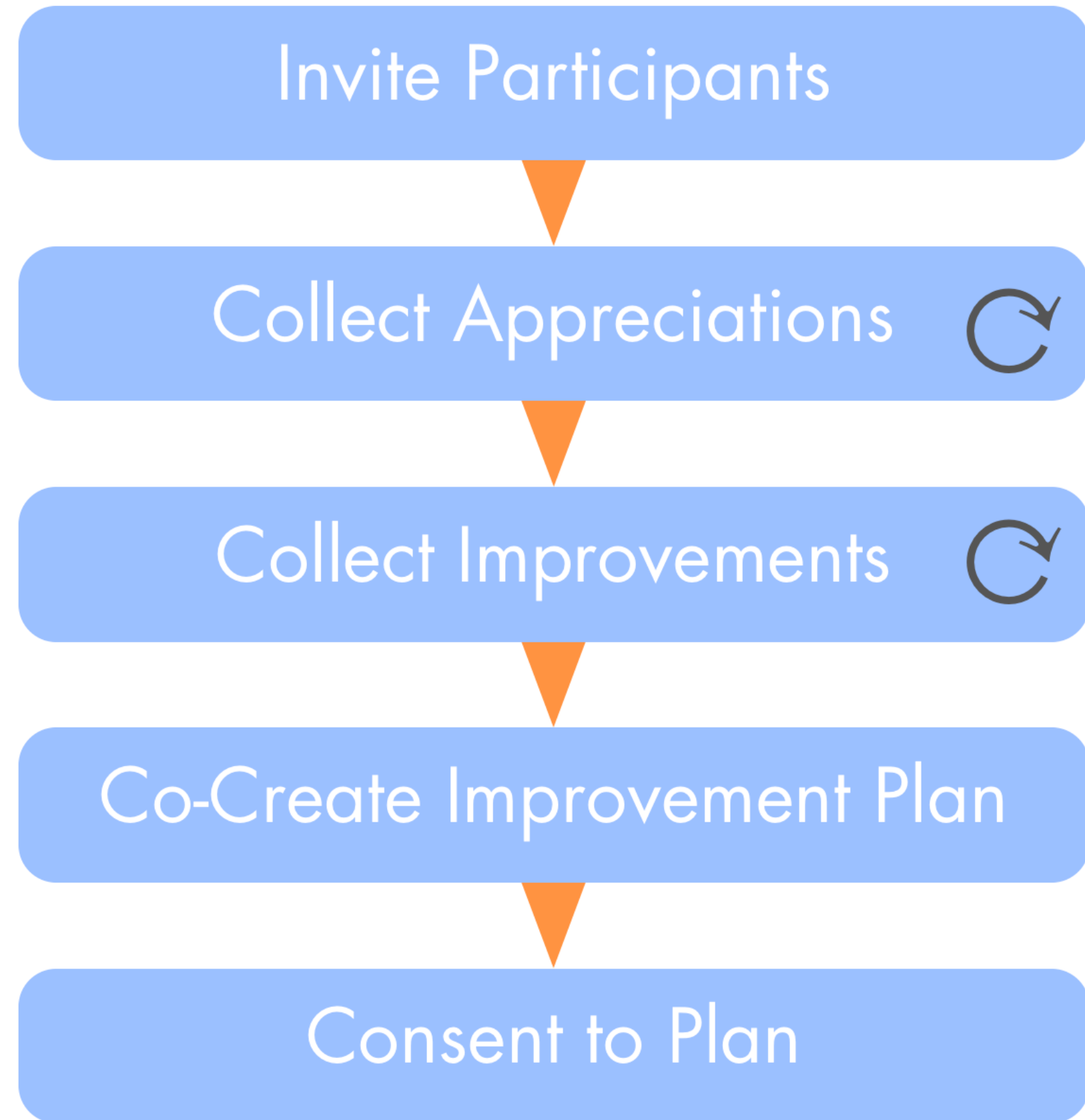
Performance Improvement Process

Continuous improvement of the effectiveness of people
in roles



Effectiveness Review

Get help from your
peers to improve your
performance.



Title of Role (Improvement Plan)

Date

Review Date

Current Role Description

Appreciations

Areas for Improvement

Action Items

- _____
- _____
- _____

Evaluation Criteria

- _____
- _____
- _____

Amendments to Role Description

- _____
- _____
- _____

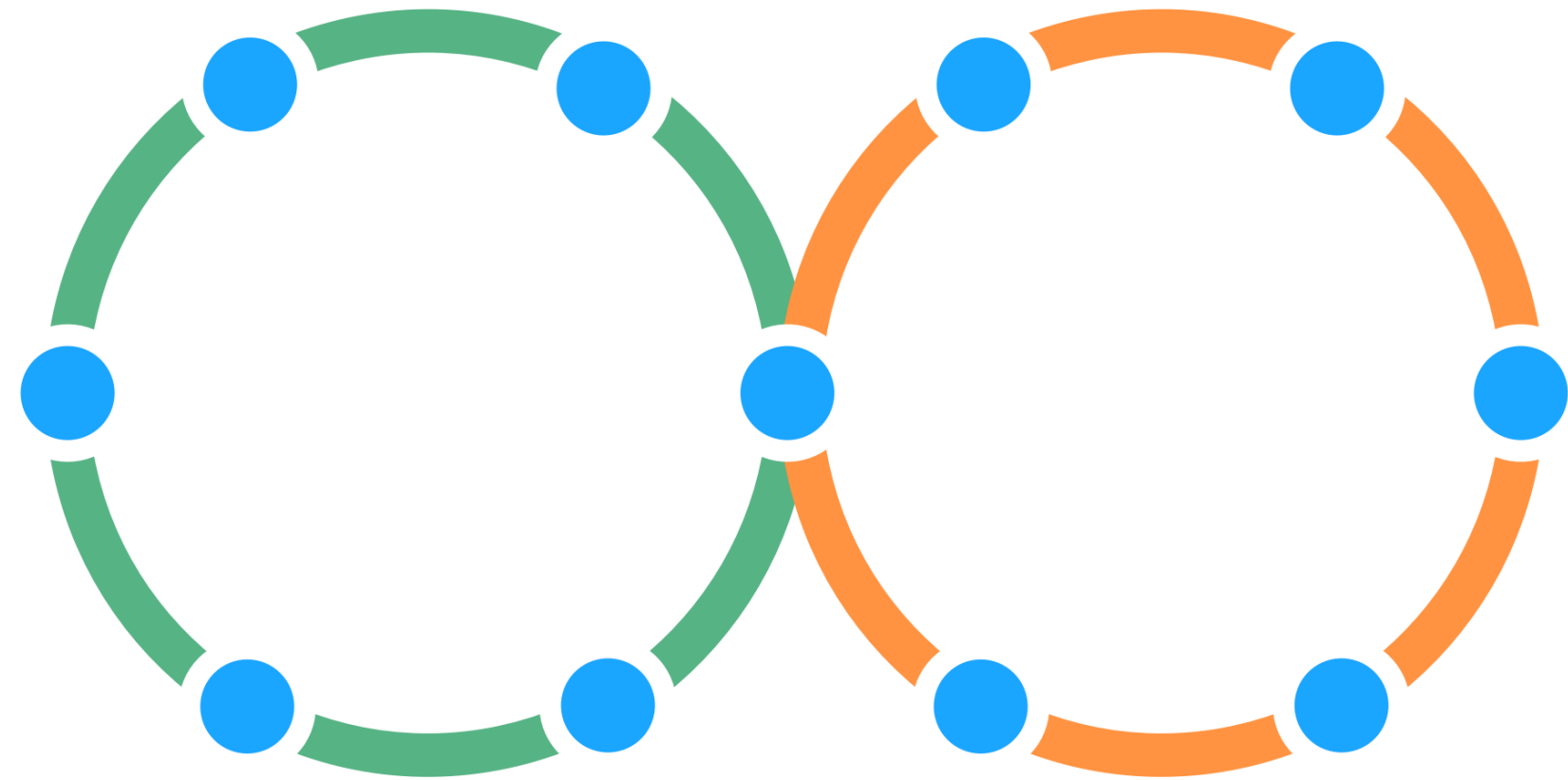
Structure

Organizational Structure

- support effective collaboration and self-organization
- delegate decision making power
- built from **circles**
- continuously evolves

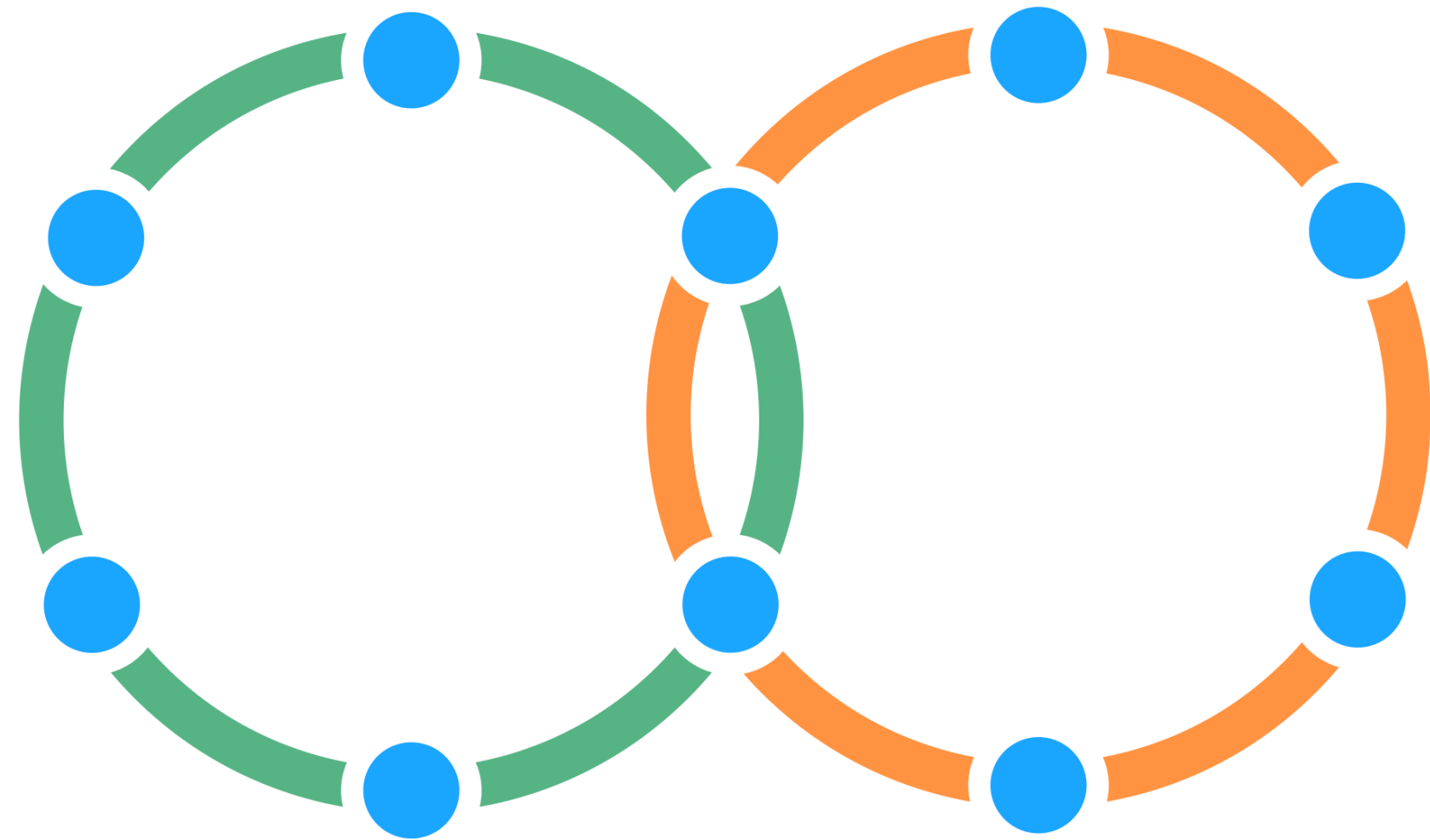
Representatives a.k.a Links...

...stand for the interests
of one circle in another
circle



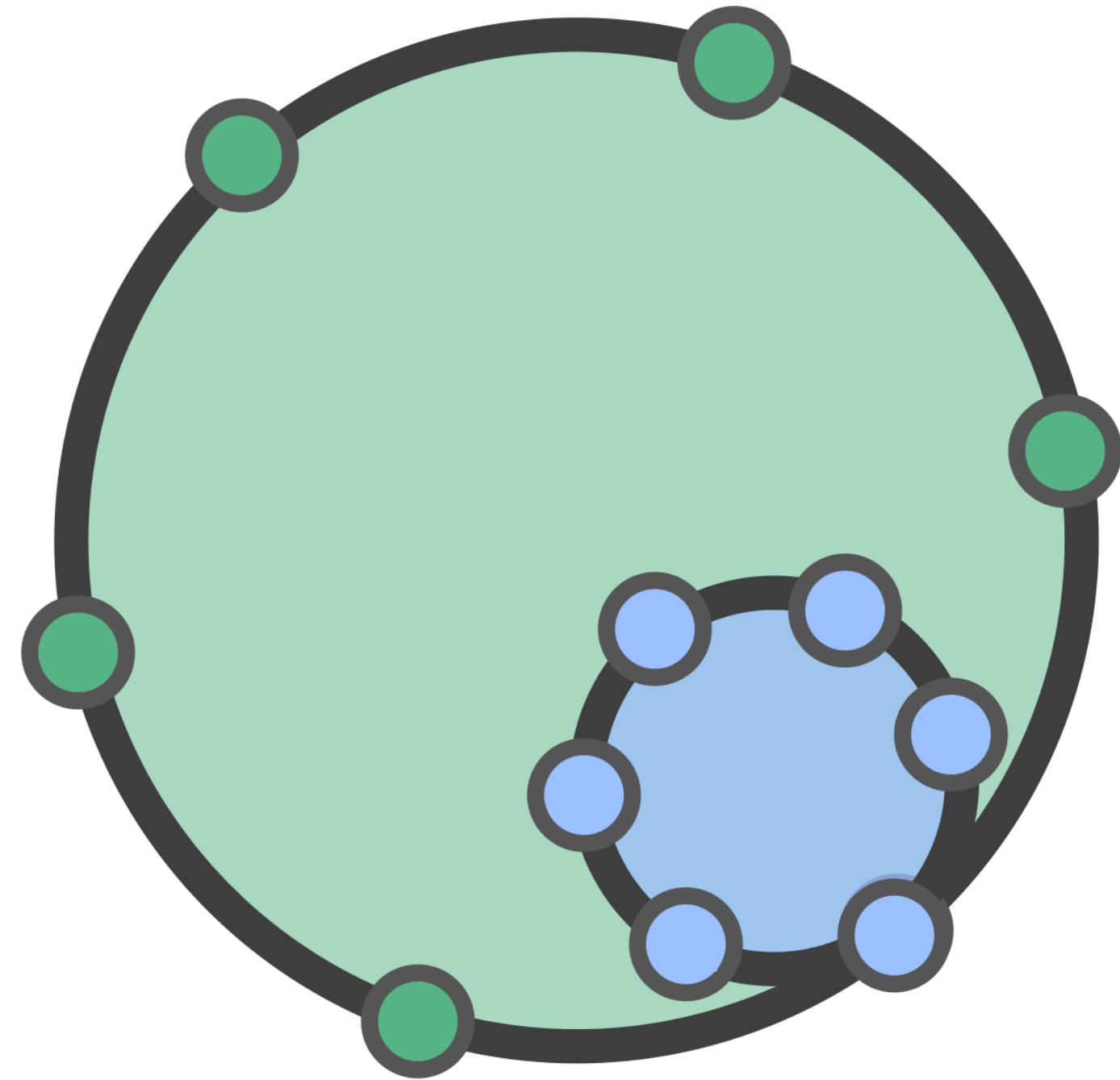
Double Linking

Facilitate two-way flow
of information and
influence



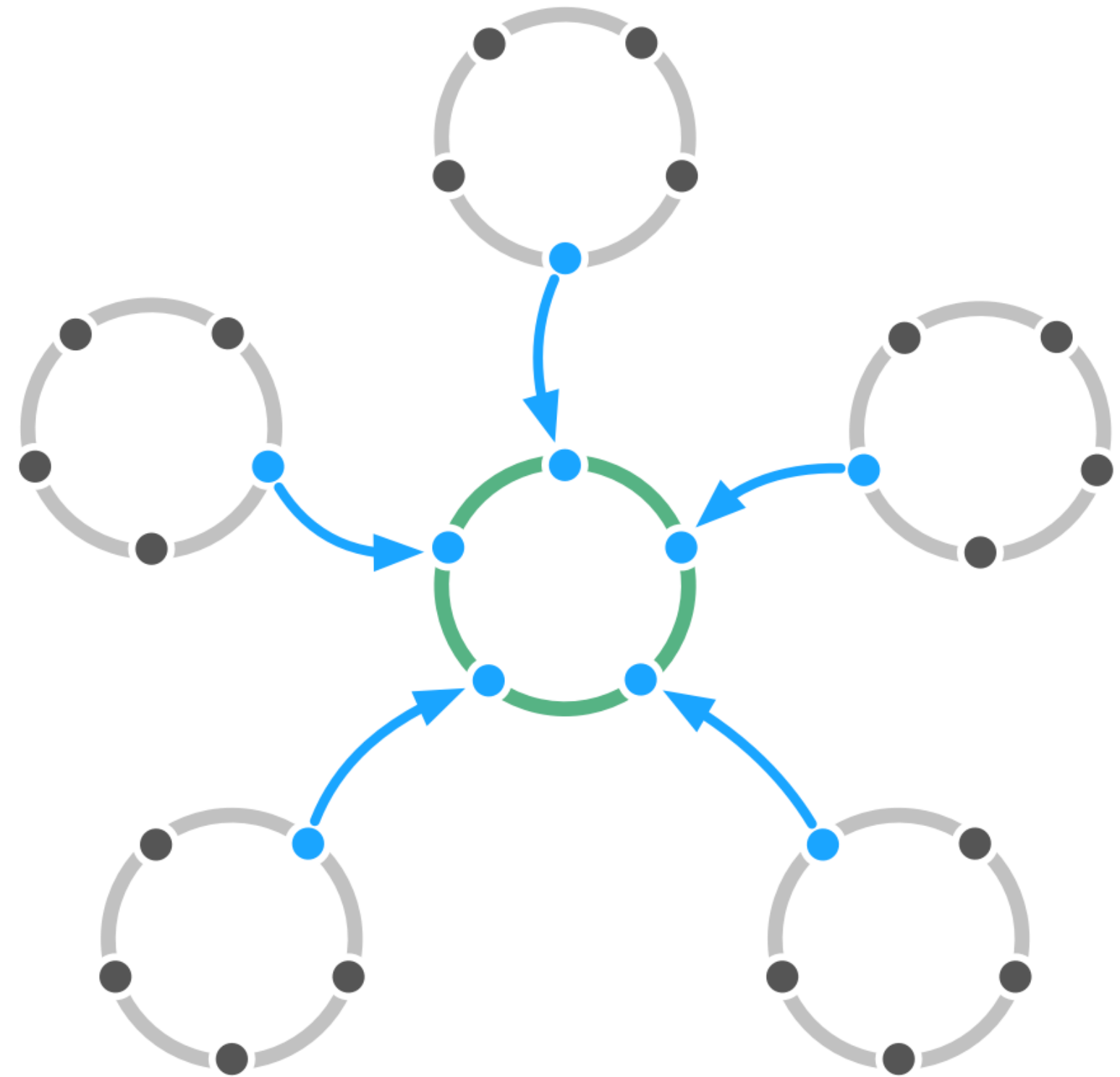
Nested Circle

A pattern for expanding functions



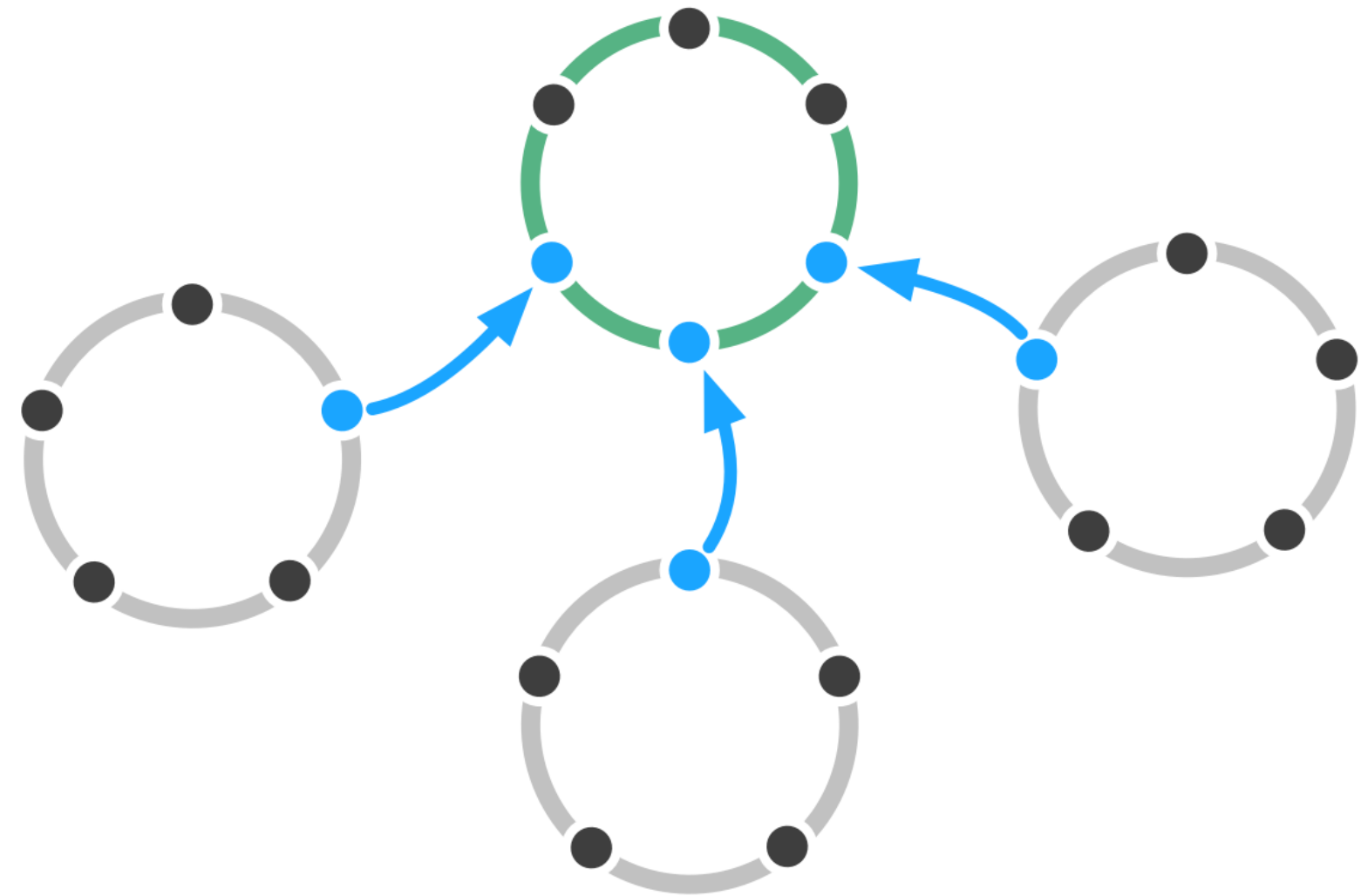
Delegate Circle

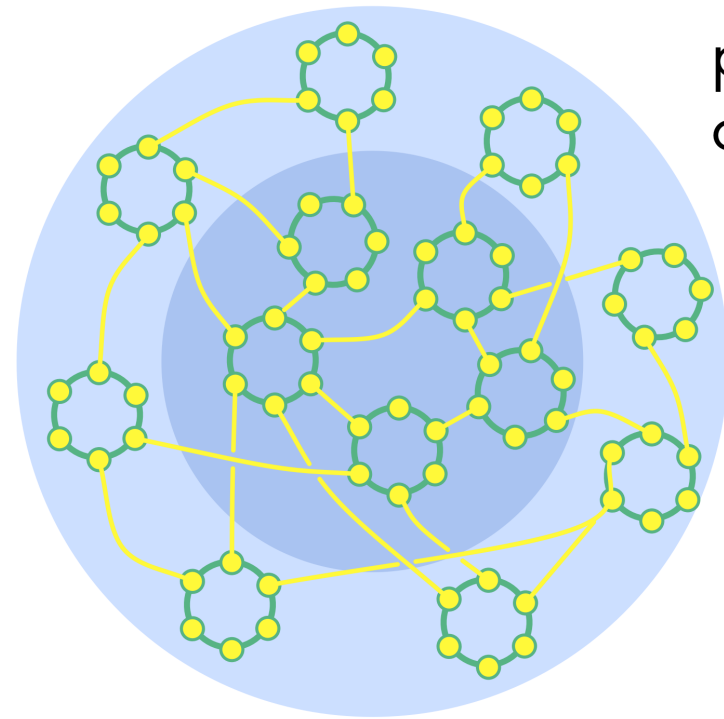
A pattern for
coordination



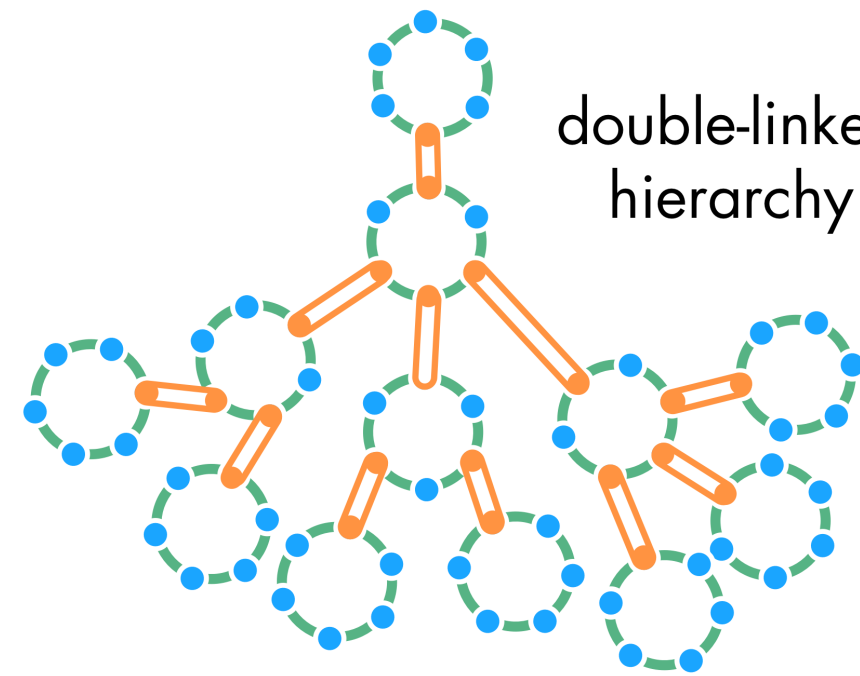
Service Circle

A pattern for
outsourcing shared
services

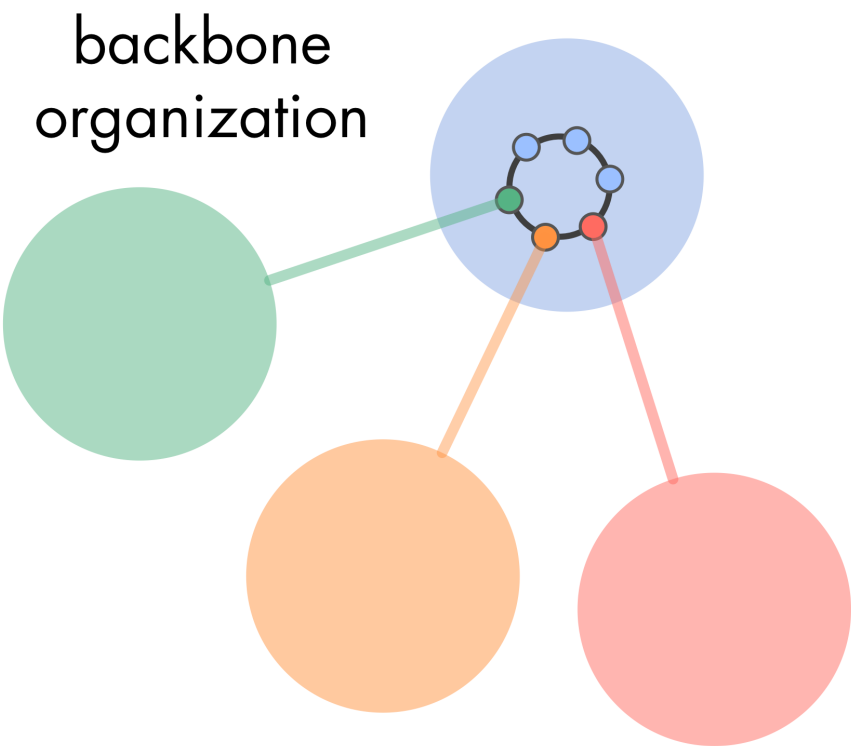




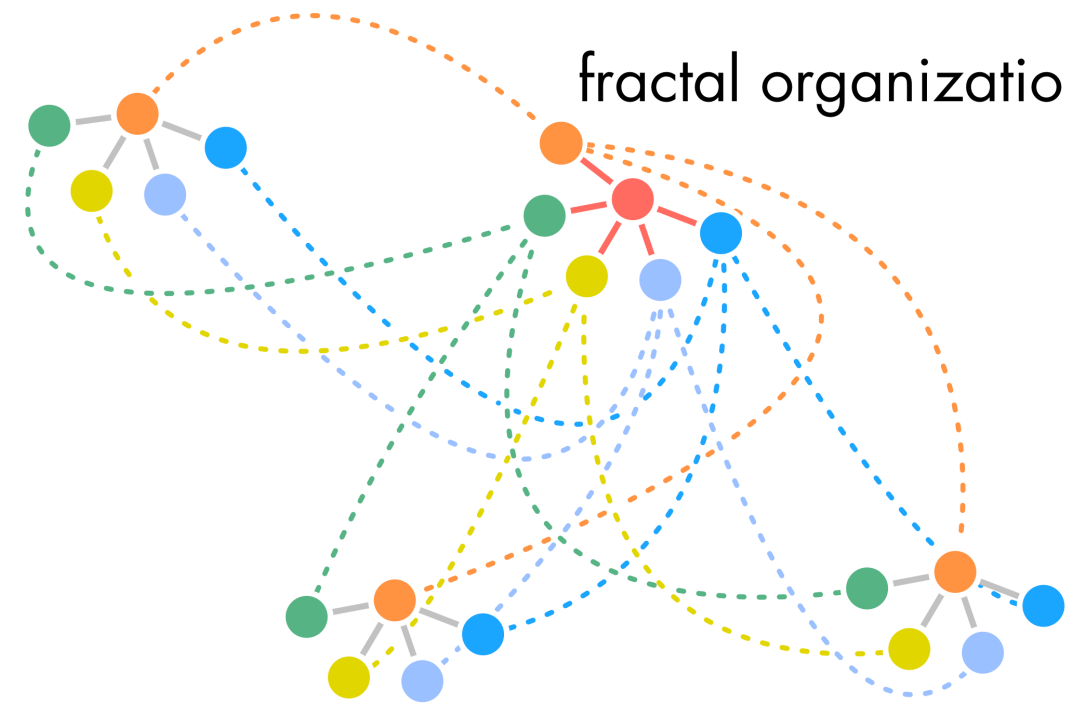
peach organization



double-linked hierarchy



backbone organization



fractal organization

Transition

How Do We Get There?

- revolutions create resistance
- revolutions break teams (➤ Scrum) and organizations (➤ Zappos)
- don't break what's already working
- meet everyone where they are

Create a Pull-System for Organizational Change

- begin with consent
- make it an experiment
- trigger continuous improvement
- let them pull in patterns
- then expand the scope of the experiment

Some Considerations

- elect a facilitator and a meeting manager
- keep a simple logbook (Google Docs, Evernote, Wiki, Trello)
- agree early on ways to join and leave a circle
- salary: focus on an agreement about fairness, not money

Context Is King
Patterns Are Just Ideas
Remix and Adapt as You Like
But Do It Together
And Evaluate the Outcome

Now what?

Main website: <http://sociocracy30.org>
(more resources and a low-traffic newsletter).

Follow us on twitter: [@sociocracy30](https://twitter.com/sociocracy30)

Join the movement and translate Sociocracy 3.0 into your language
<http://bit.ly/translate-s3>

A community platform's in planning, subscribe to the newsletter to be notified about the launch.

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