

Sociocracy 3.0

All Patterns Explained

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<http://sociocracy30.org>



Sociocracy 3.0 - A Practical Guide For Evolving Agile and Resilient Organizations

Effective Collaboration At Any Scale

- **principles-based:** A coherent way for growing organizational integrity and developing an agile mindset
- **flexible:** adaptable patterns, independent and mutually reinforcing, to help you with all aspects of collaboration
- **free:** licensed under a Creative Commons Free Culture License

What's in it for me?

Sociocracy 3.0 brings you an extensive collection of guidelines and practices (patterns) that have proven helpful for organizations for **improving performance, alignment, fulfillment and wellbeing**.

S3 helps you discover how to best reach your objectives and navigate complexity, one step at a time, **without the need for radical reorganization or a big change initiative**:

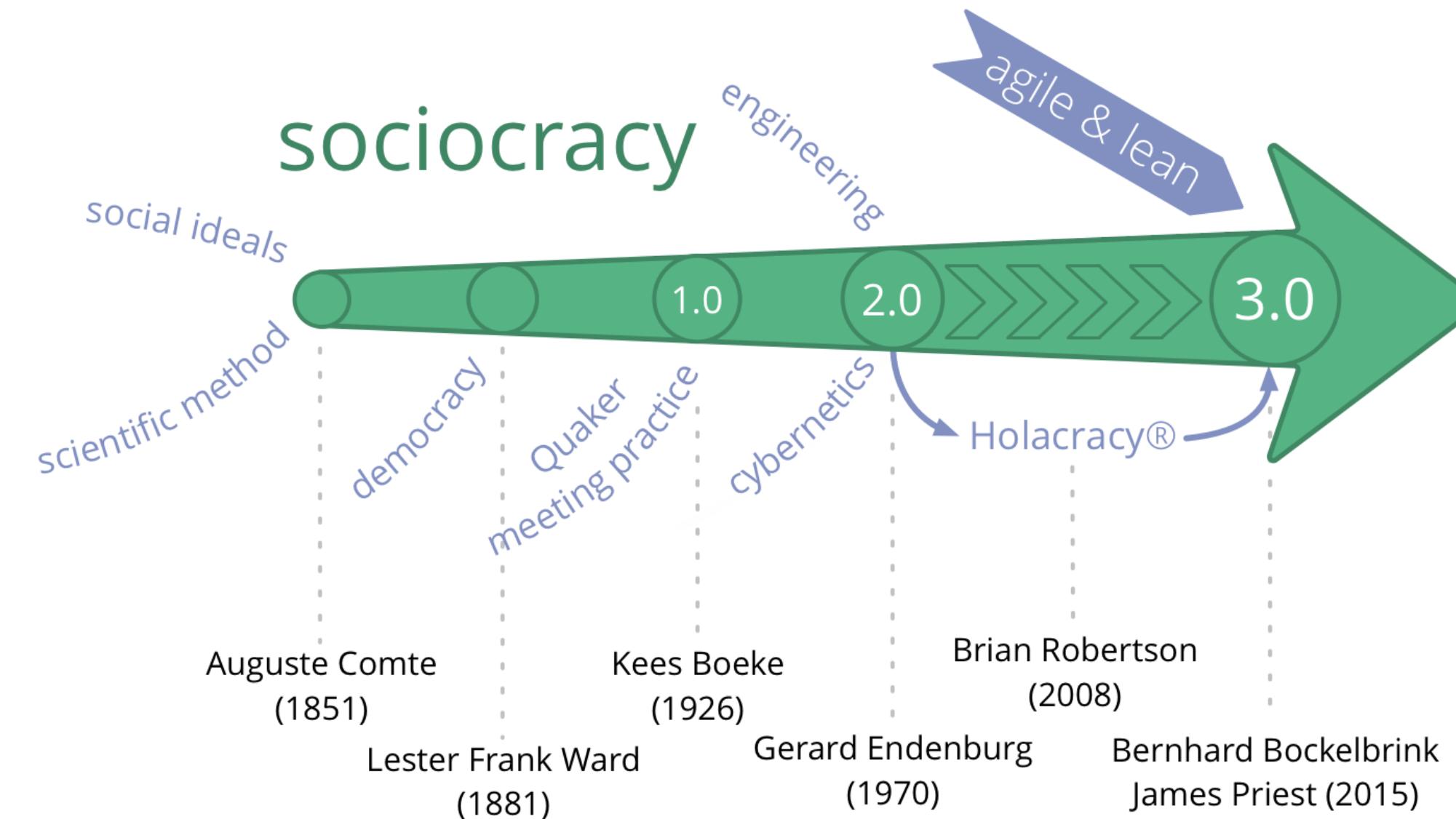
Simply start with your area of greatest need, select one or more patterns to try, **move at your own pace** and develop skills as you go.

Regardless of your position in the organization, you will find patterns that are relevant and helpful for you.

Contents

- a brief introduction of some basic concepts behind S3
- a description of all the patterns in S3
- an appendix with a changelog, acknowledgements, info about authors and license, a glossary and an index

Influences and History



Basic Concepts

Before diving into the content, consider taking time to learn about some basic concepts behind S3:

- what is a pattern?
- the seven principles
- drivers, value and waste
- domains, delegation and accountability
- governance, self-organization, and semi-autonomy

For any terms you don't understand check out the glossary at the end.

Patterns

A **pattern** is a template for successfully navigating a specific context.

- S3 patterns are discovered through observing many organizations as they solve problems and respond to opportunities
- S3 patterns can be evolved and adapted to suit differing contexts
- the patterns are grouped by topic into ten categories

co-creation and evolution

peer development

enablers of co-creation

building organizations

bringing in S3

defining agreements

focused interactions

meeting practices

organizing work

organizational structure

All Patterns are based on The Seven Principles



The Seven Principles

Effectiveness: *Devote time only to what brings you closer towards achieving your objectives.*

Consent: *Do things in the absence of reasons not to.*

Empiricism: *Test all assumptions through experiments, continuous revision and falsification.*

The Seven Principles (cont.)

Continuous Improvement: *Change incrementally to accommodate steady empirical learning.*

Equivalence: *Involve people in making and evolving decisions that affect them.*

Transparency: *Make all information accessible to everyone in an organization, unless there is a reason for confidentiality.*

Accountability: *Respond when something is needed, do what you agreed to and take ownership for the course of the organization.*

Drivers

A **driver** is a person's or a group's motive for responding to a specific situation.

Drivers:

- can be used to derive goals, objectives, aims, mission, vision, purpose
- can change

Drivers: Value and Waste

Value: *is the importance, worth or usefulness of something in relation to a driver.*

Waste: *is anything not necessary for - or standing in the way of - effective response of a driver.*

By adopting the concept of value and waste, many practices and ideas from **lean production** and **lean software development** can be utilized by organizations pulling in S3 patterns:

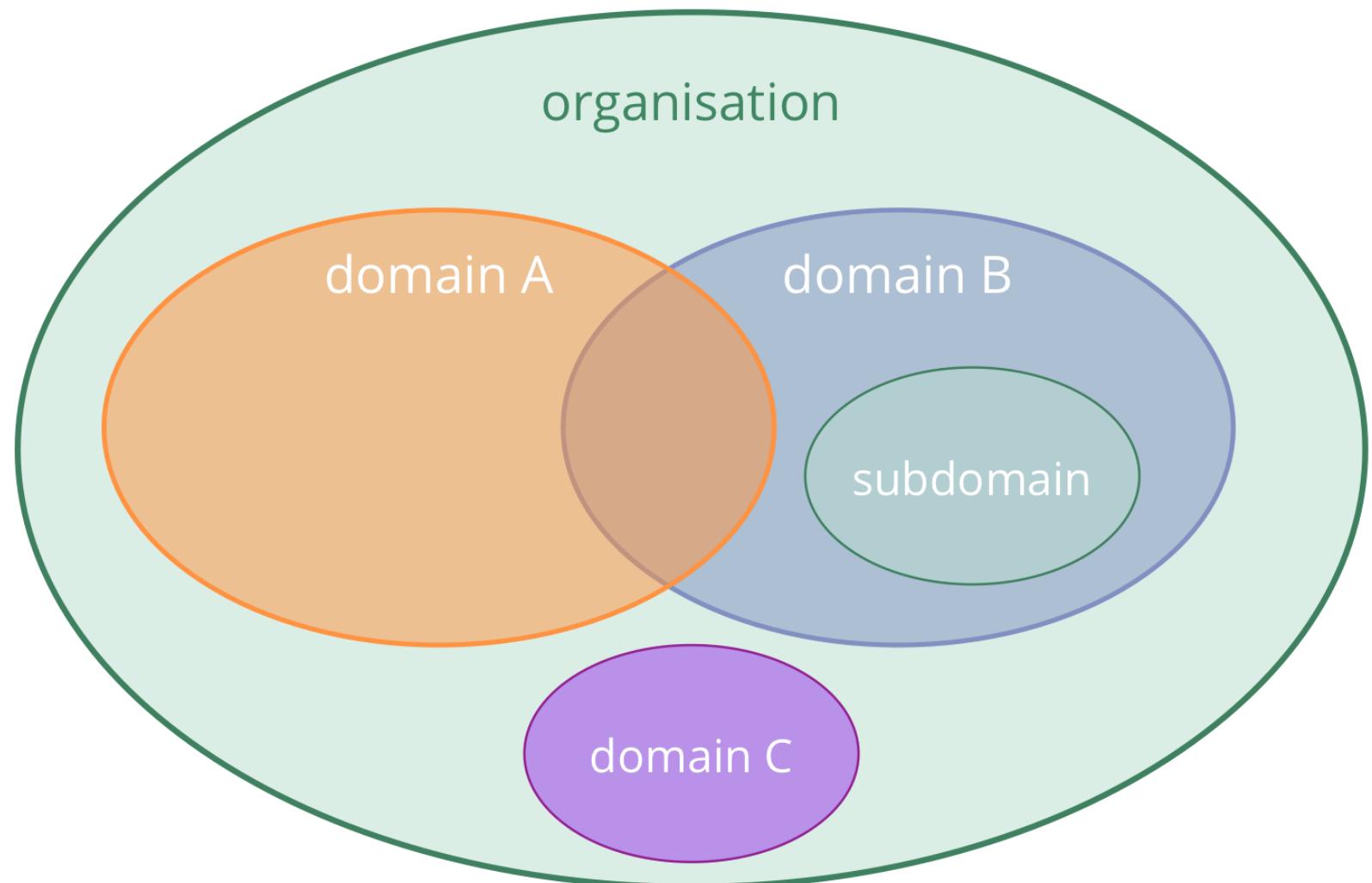
- value stream mapping
- various strategies for eliminating waste
- the Kanban Method

Domain

A **domain** is a distinct area of influence, activity and decision making within an organization.

All domains are within the overall domain of an organization and may overlap and/or be fully contained within other domains.

Domains are delegated to people (e.g. to a unit, department, team or individuals), who take accountability for the domain, within the domain's defined constraints on influence and autonomy.



Delegating Domains

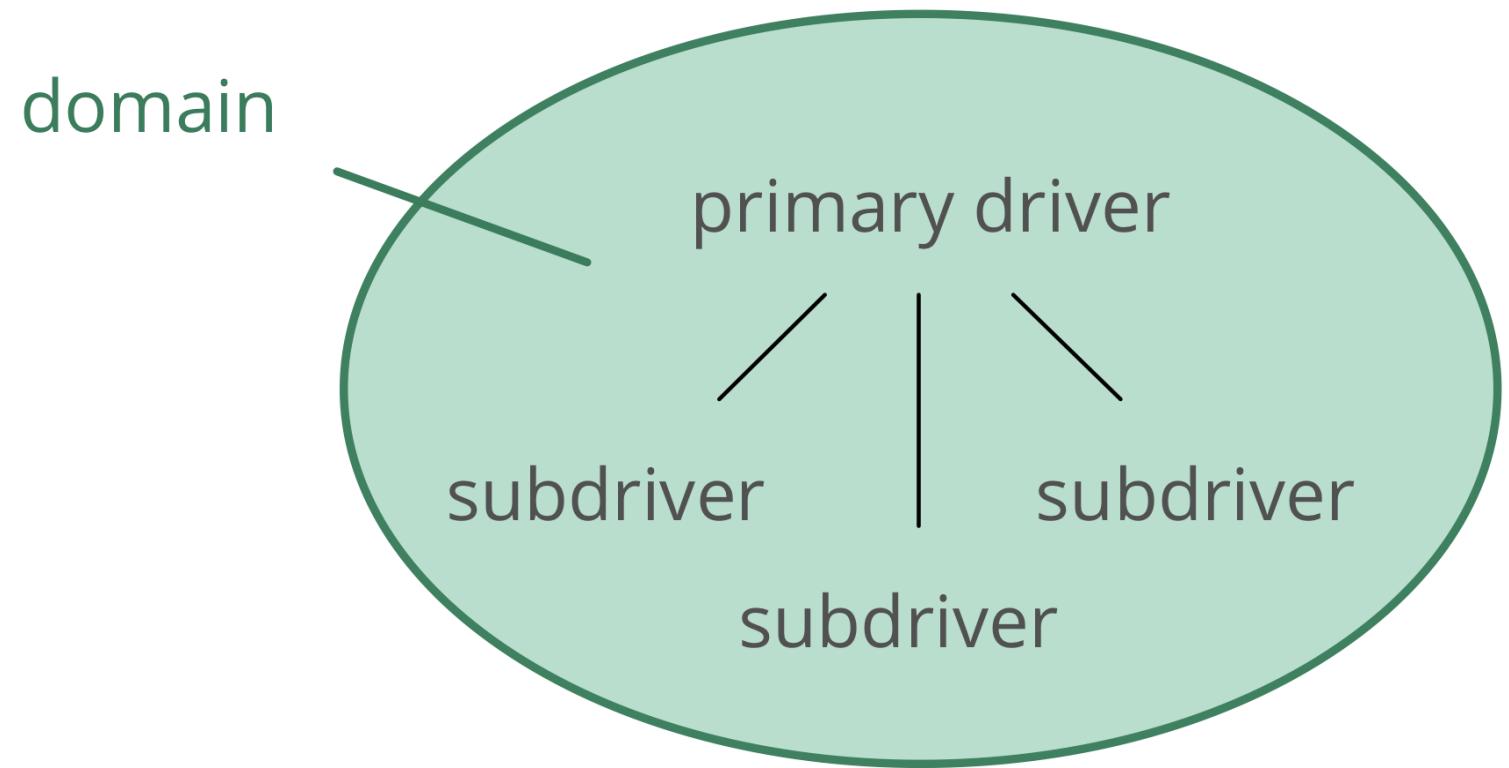
Those delegating a domain (the *delegators*) still retain overall accountability for that domain, and often define:

- **key responsibilities** (specifics of the work and decision making being delegated)
- **constraints to autonomy and influence** for those the domain is delegated to, usually related to the organization itself (e.g. budget, resources, level of delegation, reporting)

Drivers and Domains

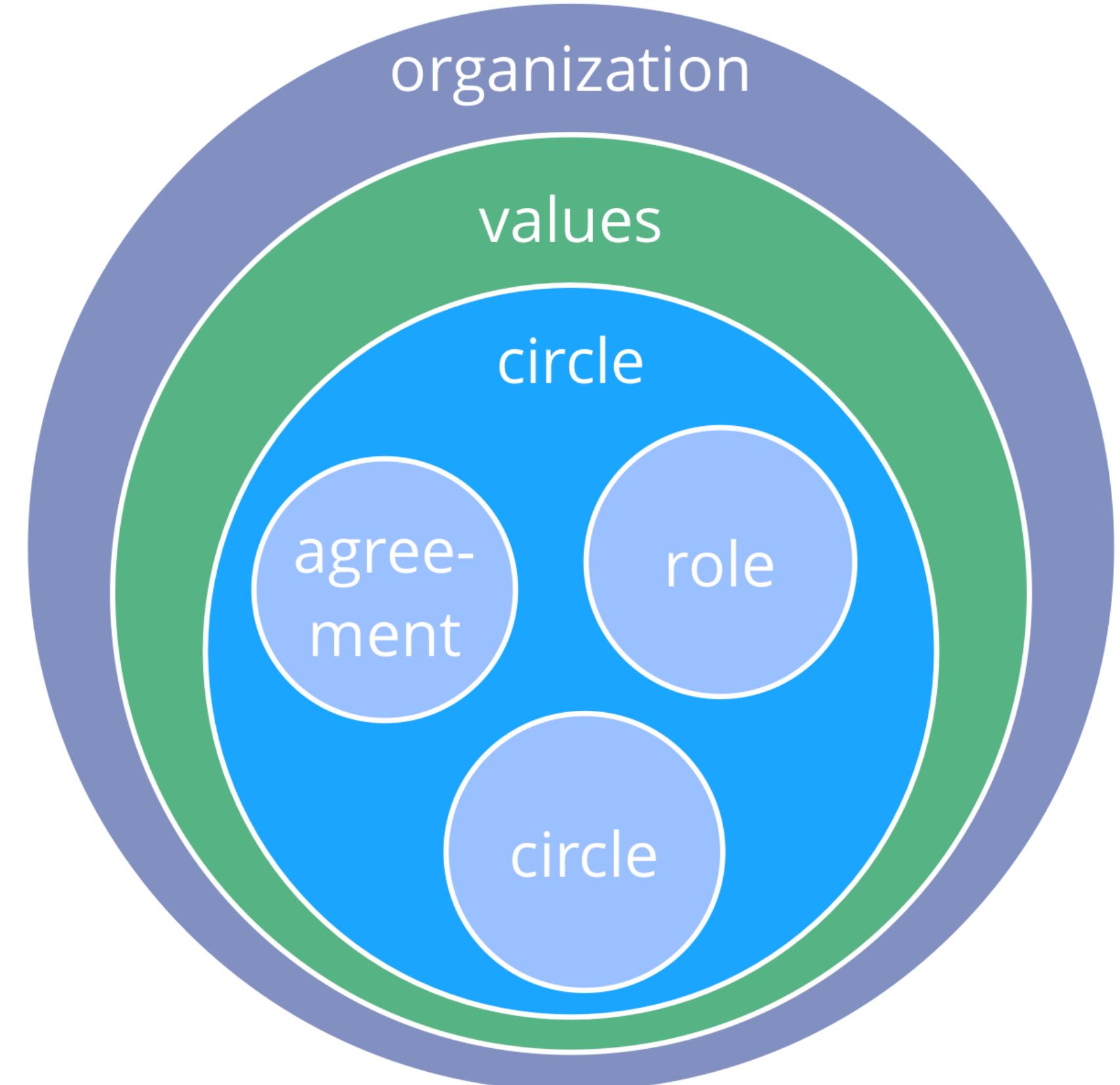
A domain can be defined in relation to an organizational driver - known as the domain's **primary driver** - by the set of sub-drivers the organization may benefit from addressing when responding to that driver:

- **key responsibilities:** following directly from the domain's primary driver
- **constraints:** relating to the organization's wider context



Domains and Accountability

- accountability applies to all agreements, including the organization itself, circles, and roles
- everyone's primary accountability is for effective collaboration in response to organizational drivers
- individuals and groups are accountable for their work and their own development
- everyone in an organization is accountable for aligning action with organizational values



Governance, Semi-Autonomy and Self-Organization

Governance: Continuously deciding what to do to achieve objectives, and setting constraints on how and when things will be done.

Self-Governance: People governing themselves within the constraints of a domain.

Self-Organization: People coordinating work within constraints defined through governance.

Operations (Doing the Work): People doing what needs to be done, guided by coordination and governance.

Semi-Autonomy: People with autonomy to create value, limited by the constraints of their domain.



Governance vs. Operations

Tracking, reviewing and evolving decisions made to achieve objectives enables an organization to continuously learn and improve.

Does it require or benefit from an individual or group decision?

- yes ➤ governance
 - not covered by a previous agreement
 - needs to be agreed, decided or amended
- no ➤ operations
 - covered by previous agreement (those accountable are free to act)
 - needs to be done

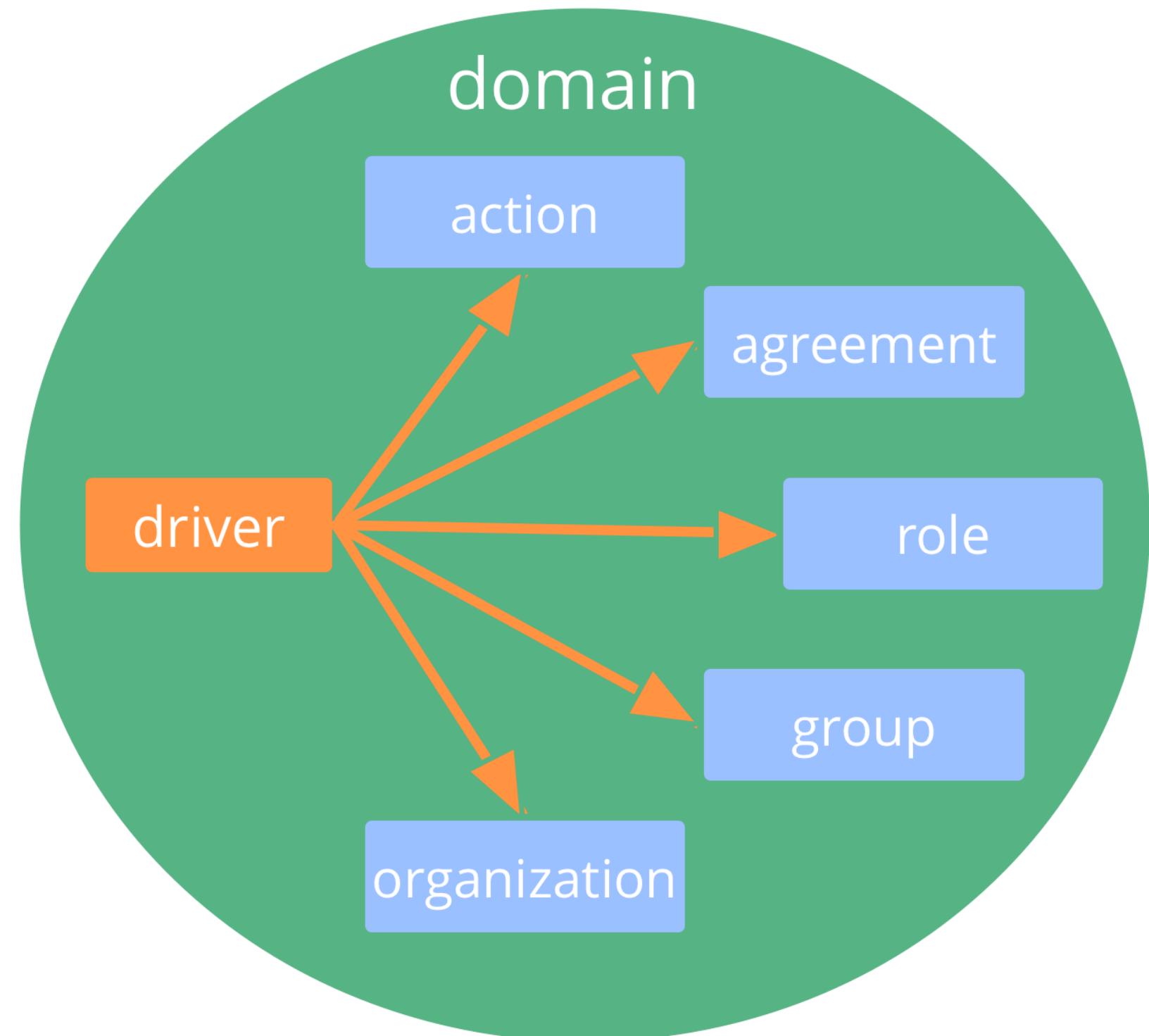


Pattern 1.1: Respond to Organizational Drivers

Clarify what's happening and what's needed in relation to the organization, and respond as required.

Responses to drivers:

- action
- decision (including creating a role, circle, helping team or open domain)



Qualify Organizational Drivers

Some situations might be helpful to address in the context of an organization's primary driver. Others are not within an organization's domain.

A simple way to qualify organizational drivers is by checking:

Would responding to this driver improve - or avoid impeding - flow of value to an existing organizational driver? a.k.a. can it help or harm us?

Review of Drivers

The response to a driver is usually an experiment that is evolved over time, based on learning.

- Is the description of the situation still correct?
- Do we still associate the same needs with the situation?
- Is the driver still within our domain?
- Is the driver still relevant?



Pattern 1.2: Navigate Via Tension

Identify and account for organizational drivers.

All members bring awareness to what might help or harm the organization, and aim to account for drivers in an effective way.

A **tension** is a personal experience: a symptom of dissonance between an individual's perception of a situation, and their expectations (or preferences).

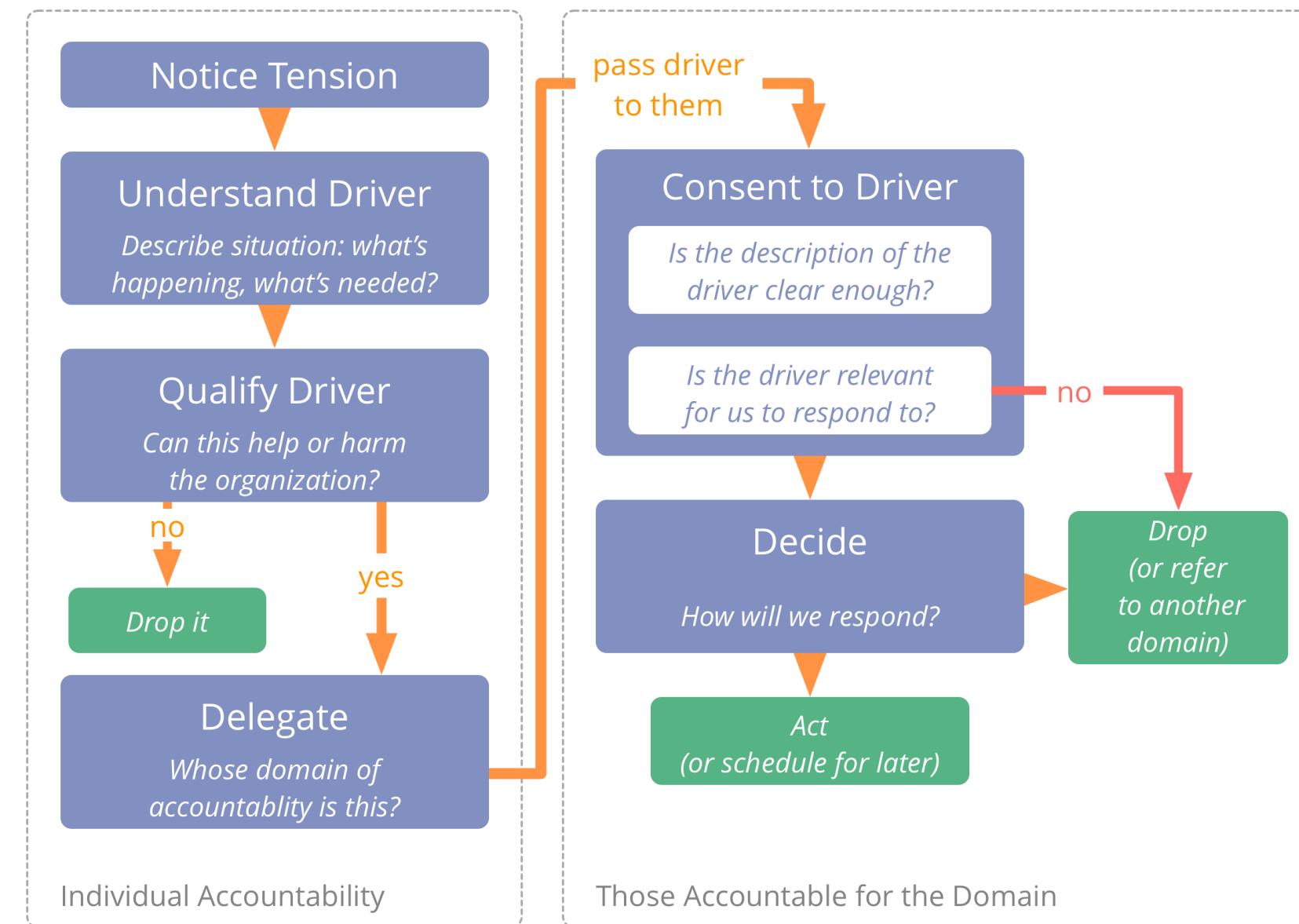
Navigate Via Tension (cont.)

Challenges and opportunities for an organization are revealed as people become aware of tension they experience in relation to them.

To **discover drivers**, look behind tension and describe what's happening and what's needed. Sometimes an inquiry reveals misconceptions and the tension goes away.

Awareness of **organizational drivers** can be passed to an appropriate domain to be addressed.

Navigate Via Tension (cont.)



Pattern 1.3: Describe Drivers

Describe drivers to understand, communicate and remember them.

A simple way to describe a driver is with a statement containing:

- a brief description of the situation (observation)
- a description of what is needed (deficit) in relation to the situation

When there's disagreement about what is needed, it's helpful to zoom out from specific solutions.

Driver statement example:

“The kitchen is a mess: there are no clean cups, the sink is full of dishes and it’s impossible to grab a coffee quickly and get back to work. We need to figure out how we can keep the kitchen in a useable state.”

The **driver statement** captures just enough information to communicate the need for an action or a decision to others. More information to reveal scope and details of the driver can be recorded in an appendix.

A driver can be described as a problem or an opportunity, depending on the perspective of the person or the group.

Pattern 1.4: Consent Decision Making

A (facilitated) group process for decision making

- invite objections, and integrate the wisdom they reveal, to evolve proposals or existing agreements
- withholding objections can harm the objectives of a group or organization
- unresolved objections prevent proposals from becoming agreements
- proposals only need to be *good enough for now and safe enough to try* until the next review

Present Driver

Consent to Driver

Present Proposal

Clarifying Questions



Brief Response



Harvest Objections



Resolve Objections

Celebrate Agreement



(Consider Concerns)

Implicit Contract of Consent

- In the absence of objections against an agreement, I intend to follow through on the agreement to the best of my ability.
- I agree to share objections as I become aware of them.

Pattern 1.5: Objection

*An **objection** is a reason why doing something stands in the way of (more) effective response to a driver.*

Objections contain information that reveals:

- a certain or likely consequence of harm (not considered safe enough to try)
- ways to improve proposals, decisions, existing agreements or actions

Qualify Objections

How would doing this impede - or miss an opportunity to improve - flow of value to any organizational driver?

Objections stop:

- current and planned action
- people from executing on decisions
- existing agreements from continuing without being reconsidered
- proposals from becoming agreements

Qualify Objections (cont.)

It's the accountability of individuals to raise potential objections.

Those accountable for the action or (proposed) agreement in question, are responsible for *considering arguments and addressing qualified objections*.

Withholding objections can harm the ability of individuals, groups or the whole organization to respond to organizational drivers.

Being able to raise *potential* objections at any time means decisions only need to be good enough for now and safe enough to try.

Understanding Objections

Some Helpful Questions

- How does the argument relate to this specific proposal or agreement?
- Does the argument reveal how a (proposed or current) **action or agreement**:
 - harms response to any organizational driver?
 - can be improved right now?
 - prevents or diminishes someone's contribution towards responding to a driver?
 - is in conflict with the organization's values?
 - is considered not 'safe enough' to try?

Concerns

A **concern** is an *opinion* that doing something (even if already considered *good enough for now and safe enough to try*) **might** impede – or miss an opportunity to improve – flow of value to an organizational driver.

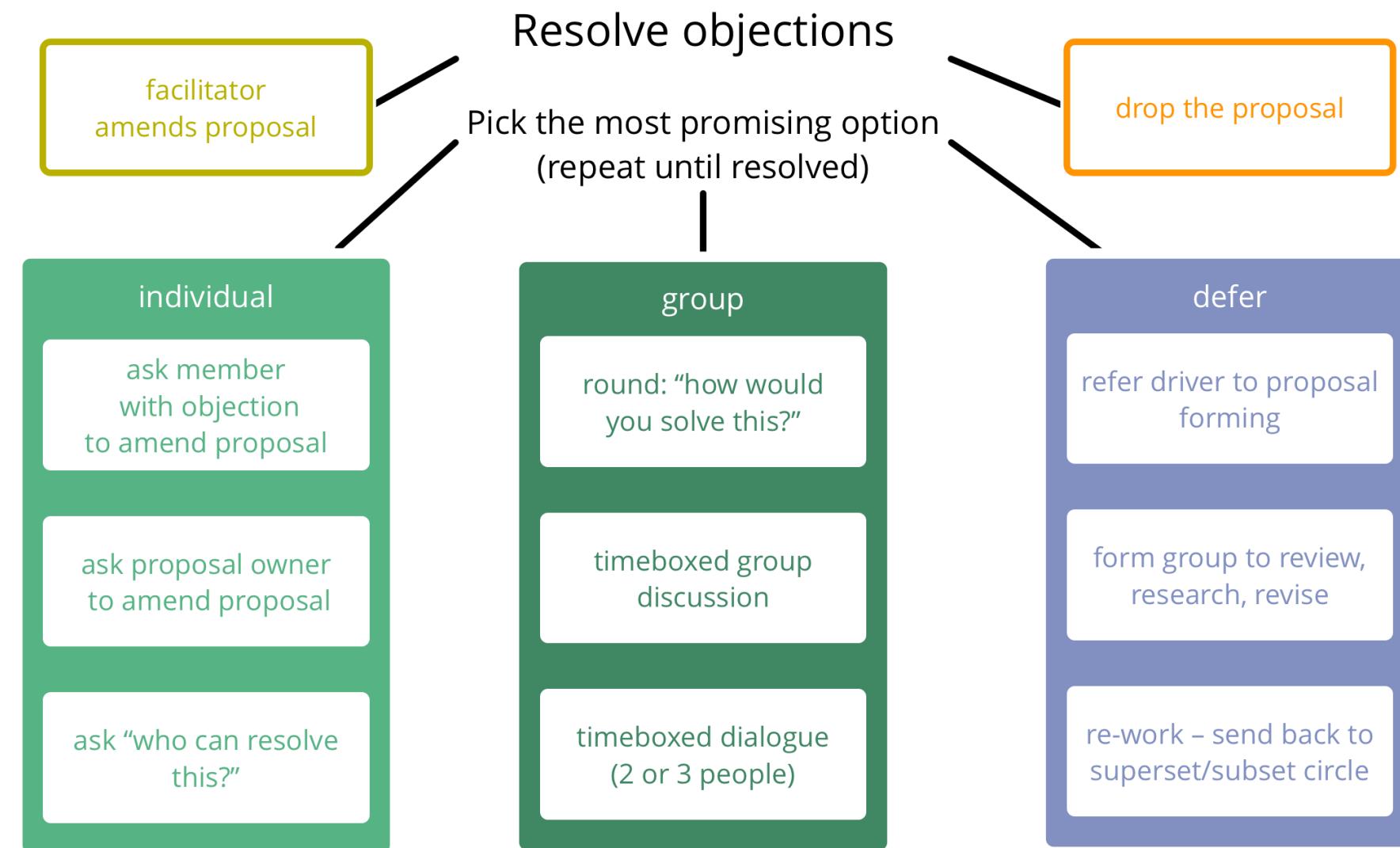
In consent decision making, concerns:

- can inform ways to further evolve agreements (including evaluation criteria and frequency of evaluation)
- are heard if there is time or they are considered important
- are recorded in the logbook

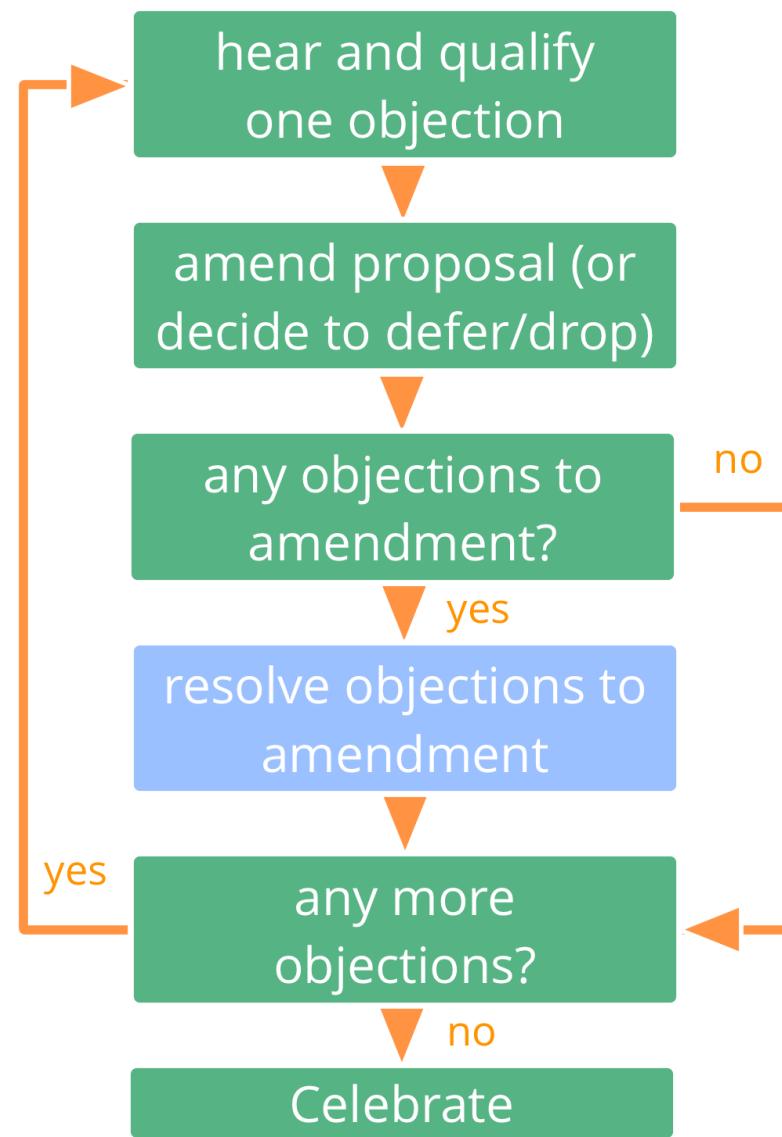
If people believe a proposal may not be ‘safe enough to try’, they can raise concerns as objections to check with others about likelihood of harm.



Pattern 1.6: Resolve Objections



A way for resolving objections

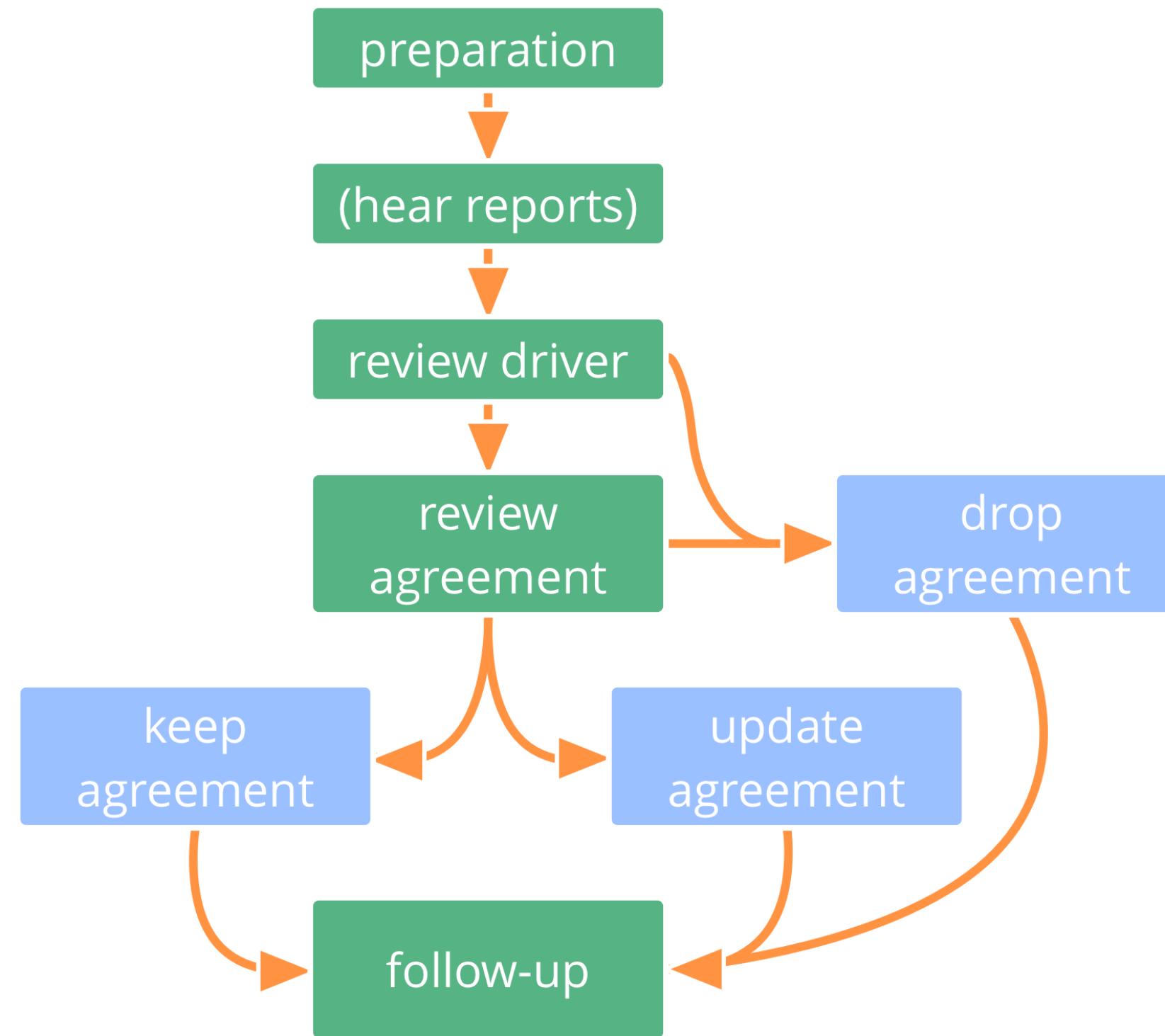


Pattern 1.7: Evaluate Agreements

Regular review of agreements is an essential practice for a learning organization; continuously evolving the body of agreements, and eliminating waste:

- adapt to changing context
- integrate learning:
 - *How has this agreement helped us?*
 - *How can this agreement be improved?*
 - *Is there any reason why not to continue with this agreement?*

Evaluate Agreements (cont.)



- preparation
 - schedule review
 - ensure necessary information is available
- follow-up
 - agree on next review date
 - documentation / notification
 - tracking tasks and decisions
 - effects on related agreements

Evaluate Agreements (cont.)

- evaluating agreements can be as simple as checking that it is still relevant, and there is no objection to keeping the agreement as it is
- agreements are often reviewed in *Governance Meetings*
- sometimes it's effective to schedule a dedicated session for reviewing an agreement
- adjust review frequency as necessary
- review earlier if required
- elements of this process can also be used by individuals to evaluate decisions they make

Pattern 1.8: Those Affected Decide

Involve everyone who will be affected by a decision, to maintain equivalence and accountability, and increase the amount of information available on the subject.

For larger groups:

- facilitate a process in several stages and create smaller groups who select delegates
- set out a virtual, asynchronous, time-boxed and staged process

Consider including those affected also in review and evolution of decisions.

Pattern 1.9: Proposal Forming

A (facilitated) group process for co-creating a response to a driver

- draws on the collective intelligence and diversity of perspective within a group
- involves people in co-creating agreements
- fosters accountability and sense of ownership

Proposal forming may be also be used by an individual.

Consent to Driver

Questions about Driver

Record Considerations

Information Gathering Questions

Prioritize Considerations

Collect Ideas

Select Tuners

Design Proposal(s)

Proposal Forming Steps

- **Consent to driver:** *Is this driver relevant for us to respond to? Is the driver statement an accurate description of what is happening and what is needed?*
- **Deepen shared understanding of driver:** invite essential questions to understand more detail about the driver.
- **Collect considerations** phrased as questions relating to possible solutions. Questions either reveal constraints (information gathering questions) or possibilities (generative questions).
- **Answer** any information gathering questions if possible.
- **Prioritize** considerations.
- **Gather ideas** as possible ingredients for a proposal.
- **Design a proposal** for addressing the driver considering the creative ideas and information gathered so far. This is usually done by a smaller group (tuners).

Selecting Tuners

- who should be there?
- who wants to be there?
- who else may have a valuable contribution to make?
- consider expertise, outside view, and inspiration
- any objections to this group?

Title of Proposal

Evaluation Date and/or Frequency

Who is accountable?

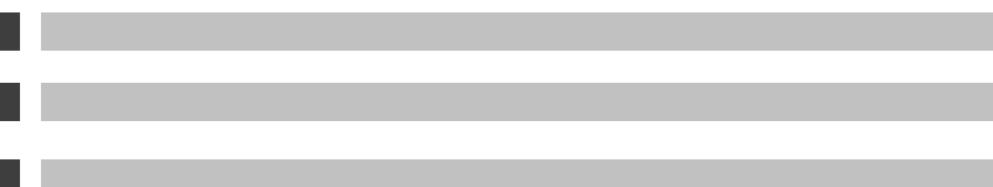
Driver



Proposal Text



Evaluation Process and Criteria



Pattern 1.10: Role Selection

A group process for selecting people for roles

- People avoid expressing interest before the selection
- Nominations are made on the strength of the reason, not according to the majority
- You can nominate yourself or pass
- When checking for objections, ask the person nominated last

Objections to a nominee may be resolved in many ways, including amending the role's domain description or by nominating someone else.

Note: This pattern can also be used for selection between a variety of options in other circumstances.

Present Role Description

Record Nominations

Reasons for Nominations 

Information Gathering

Nomination Changes 

Propose a Nominee

Harvest Objections 

Address and Resolve

Celebrate

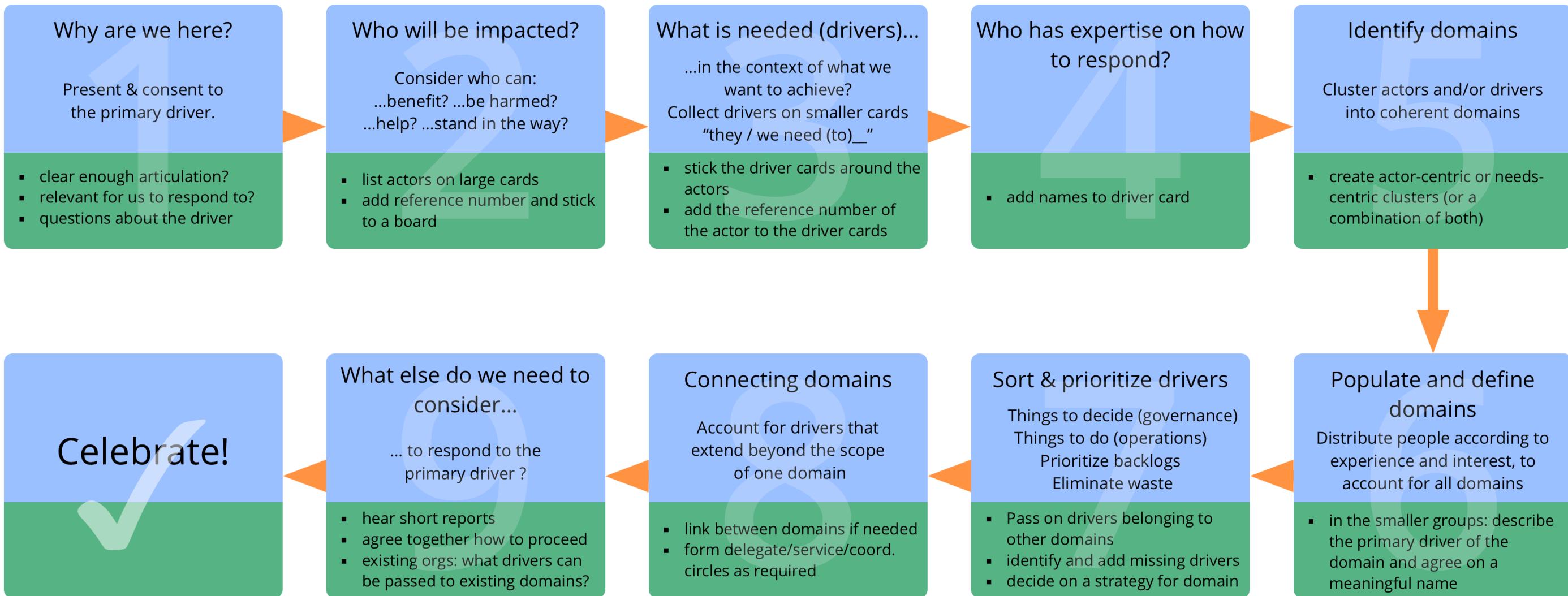


Pattern 1.11: Driver Mapping

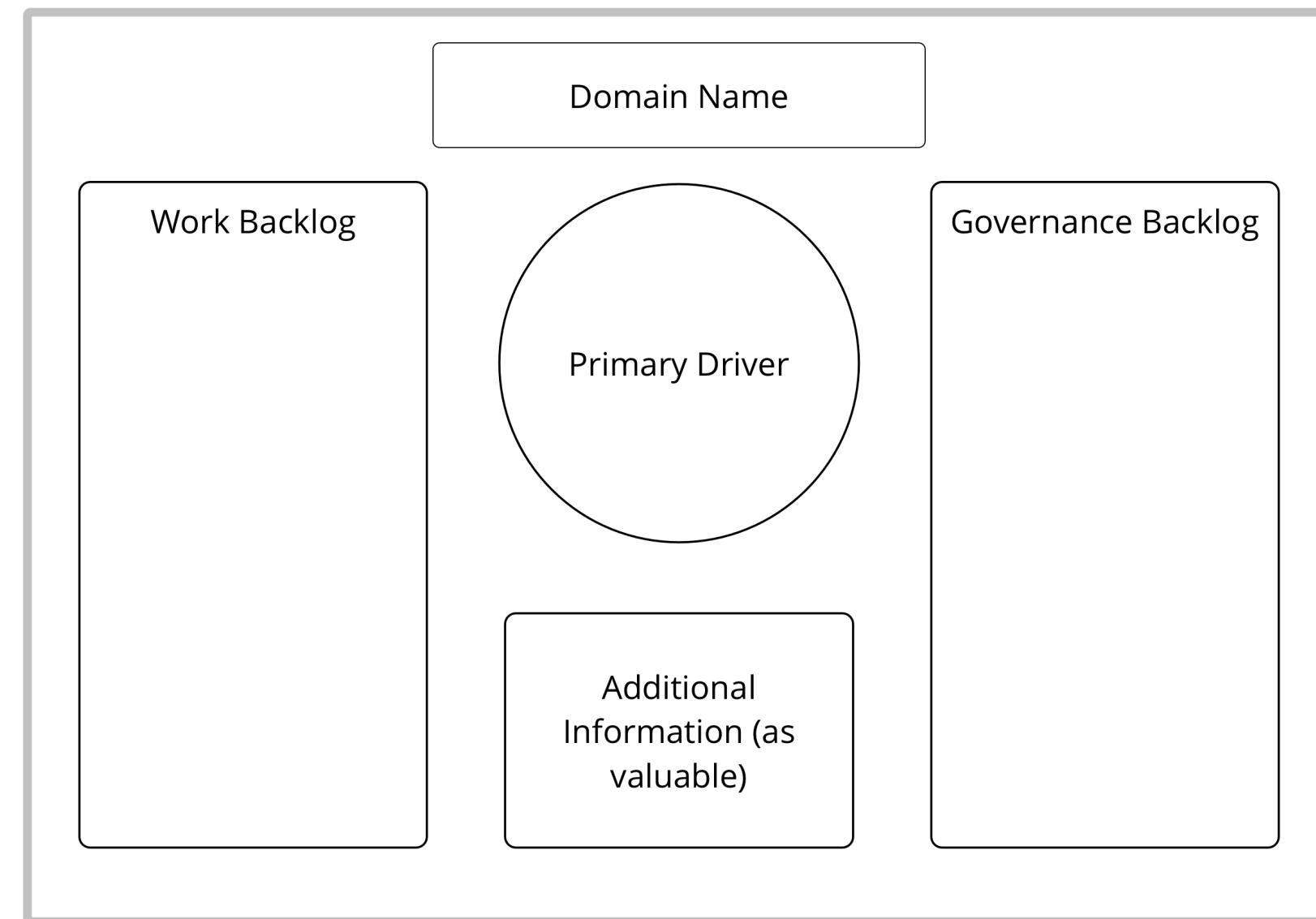
A workshop format to identify an effective response to a complex situation: organize start-ups, kick-off projects, tackle major impediments or opportunities, align organizational structure to the flow of value.

Small or large groups identify and prioritize drivers, progressing quickly from concept to action in self-organizing teams.

Driver Mapping (cont.)



Driver Mapping: Template for Domains





Pattern 2.1: Ask For Help

A simple protocol for learning, skill sharing, and building connections, with respect for people's autonomy.

Ask someone, "*would you be willing to help me with ...?*" The person asked answers with a simple "yes" or "no".

- if the request is declined, the person asking accepts the answer without negotiation or inquiry
- if the request is unclear, inquire for more information
- if you accept a request for help, support your peer in the best way you can

Pattern 2.2: Peer Feedback

Invite a peer to give you some constructive feedback on:

- performance in a role
- general feedback about your participation and collaboration
- any specific aspect you may be interested in

Considerations:

- ask peers to take some time to prepare
- invite both **appreciations** and **actionable improvement suggestions**
- inquire to better understand the feedback, and avoid to discuss or judge it
- decide for yourself what you will do with the feedback



Pattern 2.3: Peer Review

People support each other to learn and grow in the roles and groups they serve.

The role keeper - or group - leads the peer review by setting up the process and speaking first in each step.

Ensure to invite people with complementing perspectives to contribute to the review, and a facilitator.

Improvement suggestions apply to personal development, collaboration, updates to domain description (including driver statement) and strategy.

Invite Contributors

Present Domain Description and Strategy

Collect Appreciations

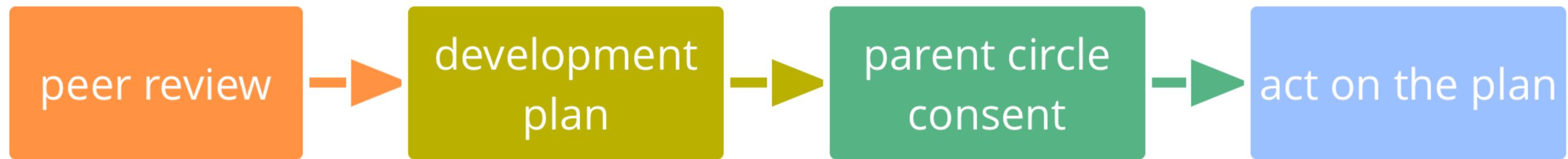
Collect Improvement Suggestions

Co-CREATE Development Plan

Consent to Plan

Peer Review (cont.)

Continuous improvement of people's ability to effectively fulfill roles or collaborate together in groups.



Pattern 2.4: Development Plan

An agreement supporting people to more effectively collaborate as a group or fulfill a role.

A development plan is passed as a proposal to the delegator to test for objections and concerns.

Acting on development plans is an integral part of the strategy of people in roles, and of groups.

Development Plan for <Domain Name>

Date/Version

Review Date

Amendments to Strategy

- [REDACTED]
- [REDACTED]
- [REDACTED]

Action Items

- [REDACTED]
- [REDACTED]
- [REDACTED]

Evaluation Criteria

- [REDACTED]
- [REDACTED]
- [REDACTED]

Amendments to Domain Description

- [REDACTED]
- [REDACTED]
- [REDACTED]

Minutes of Peer Review

Current Domain Description

- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]

Appreciations

- [REDACTED]
- [REDACTED]
- [REDACTED]

Actionable Improvement Suggestions

- [REDACTED]
- [REDACTED]
- [REDACTED]



Pattern 3.1: Artful Participation

An **individual commitment** to developing helpful interactions and effective collaboration:

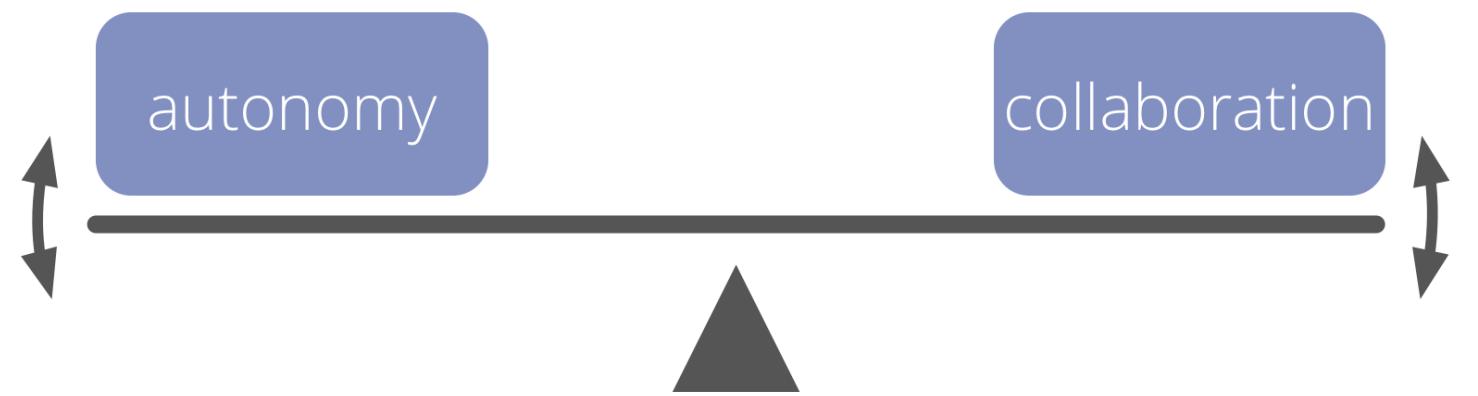
- actively **consider and follow-up on all agreements** made, in the best way possible, given the circumstances
- **develop awareness and understanding** of individual and collective needs
- **grow the necessary skills** to do so
- **support others** in doing the same
- bring impediments to the attention of others if necessary

Participating artfully may include interrupting, objecting or breaking agreements.

"Is my behavior in this moment the greatest contribution I can make to the effectiveness of this collaboration?"

Benefits Of Artful Participation

- enables co-creation and evolution of agreements
- helps to grow stronger teams
- builds self-accountability, integrity and trust
- generates a culture of mutual support and close collaboration
- even more powerful when embraced by many



Artful Participation: Self-Assessment

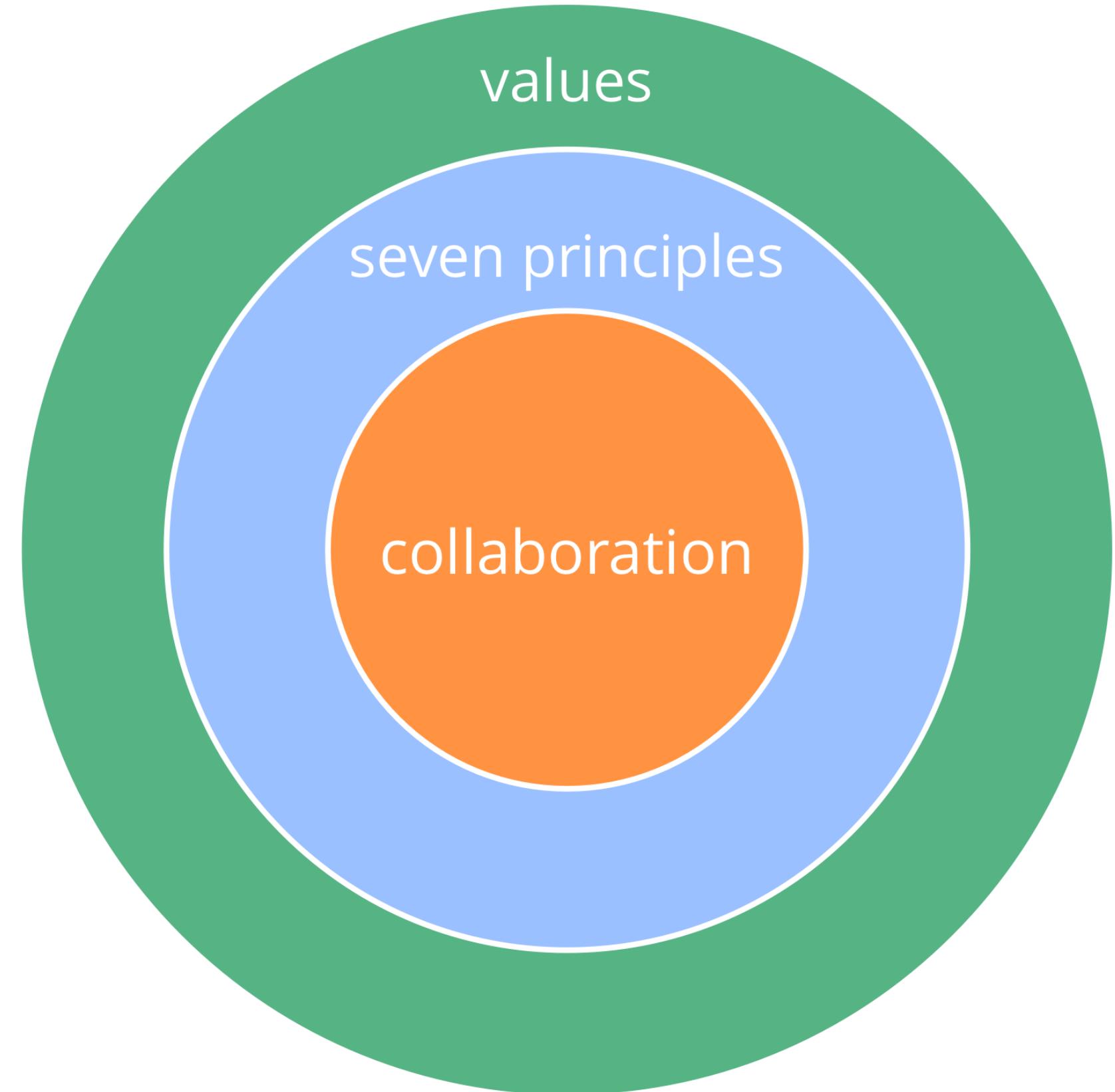
- How will I support myself and others in participating more artfully?
- Where are my interactions with others unhelpful or ineffective?
- Which agreements do I find hard to keep or contribute to? What can I do to address this?
- What skills could I develop, that would support me to participate more artfully?
- What would artful participation mean in relation to:
 - my daily activities?
 - collaboration and interaction with others?
 - the organization? ...our customers or clients?
 - the wider environment?

Pattern 3.2: Adopt The Seven Principles



Adopt The Seven Principles (cont.)

- align collaboration with the Seven Principles
- adopting the Seven Principles reduces the number of explicit agreements required, and guides adaptation of S3 patterns to suit the organization's context
- an organization's actual values need to embrace Sociocracy 3.0 principles



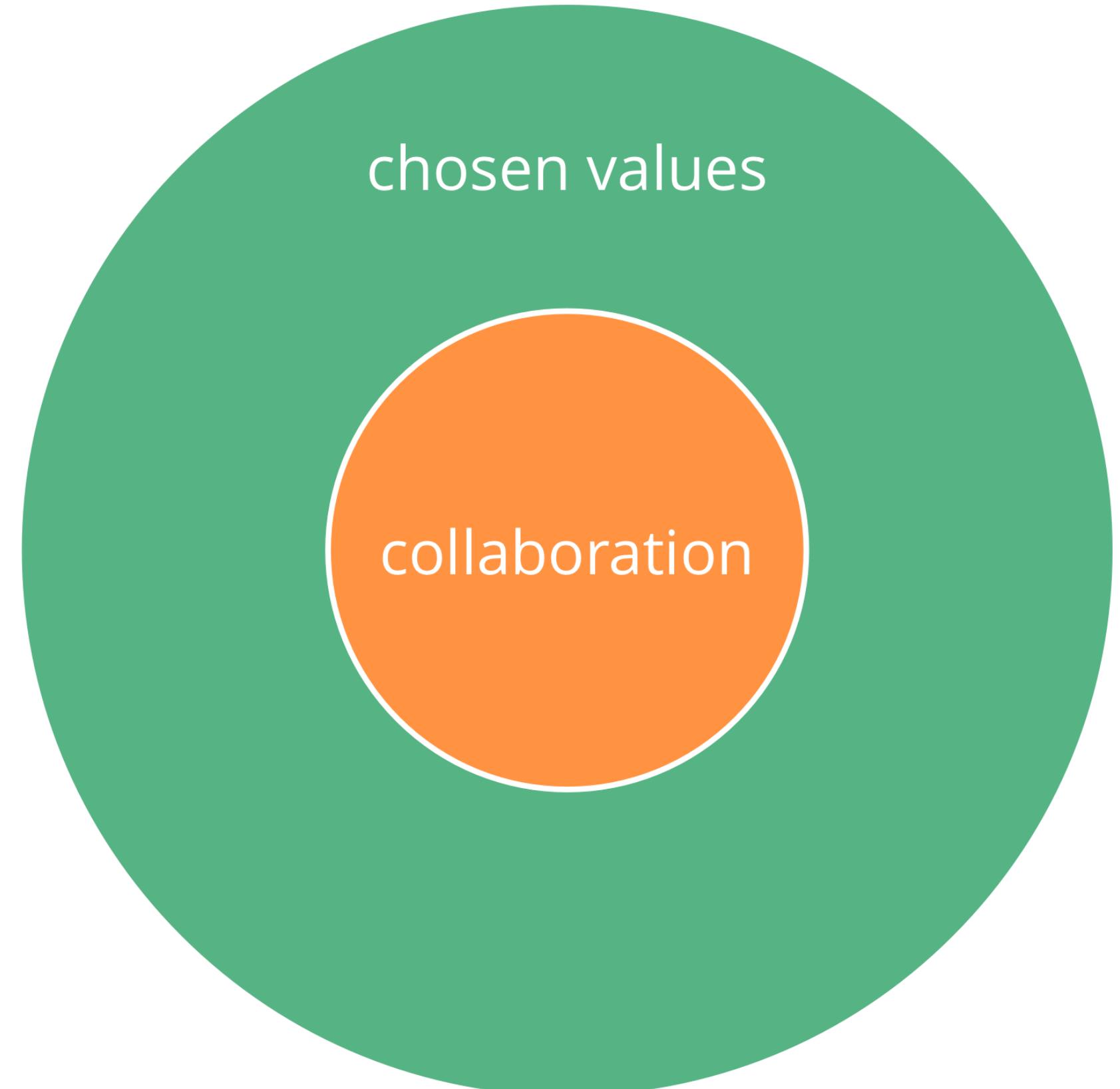
Pattern 3.3: Agree On Values

Intentionally shape the culture in your organization

A **value** is a principle that guides behavior.

Values define scope for action and ethical constraints.

- each member brings their own values to an organization based on personal experiences and beliefs
- a group or organization may **choose to collectively adopt values** to guide their collaboration



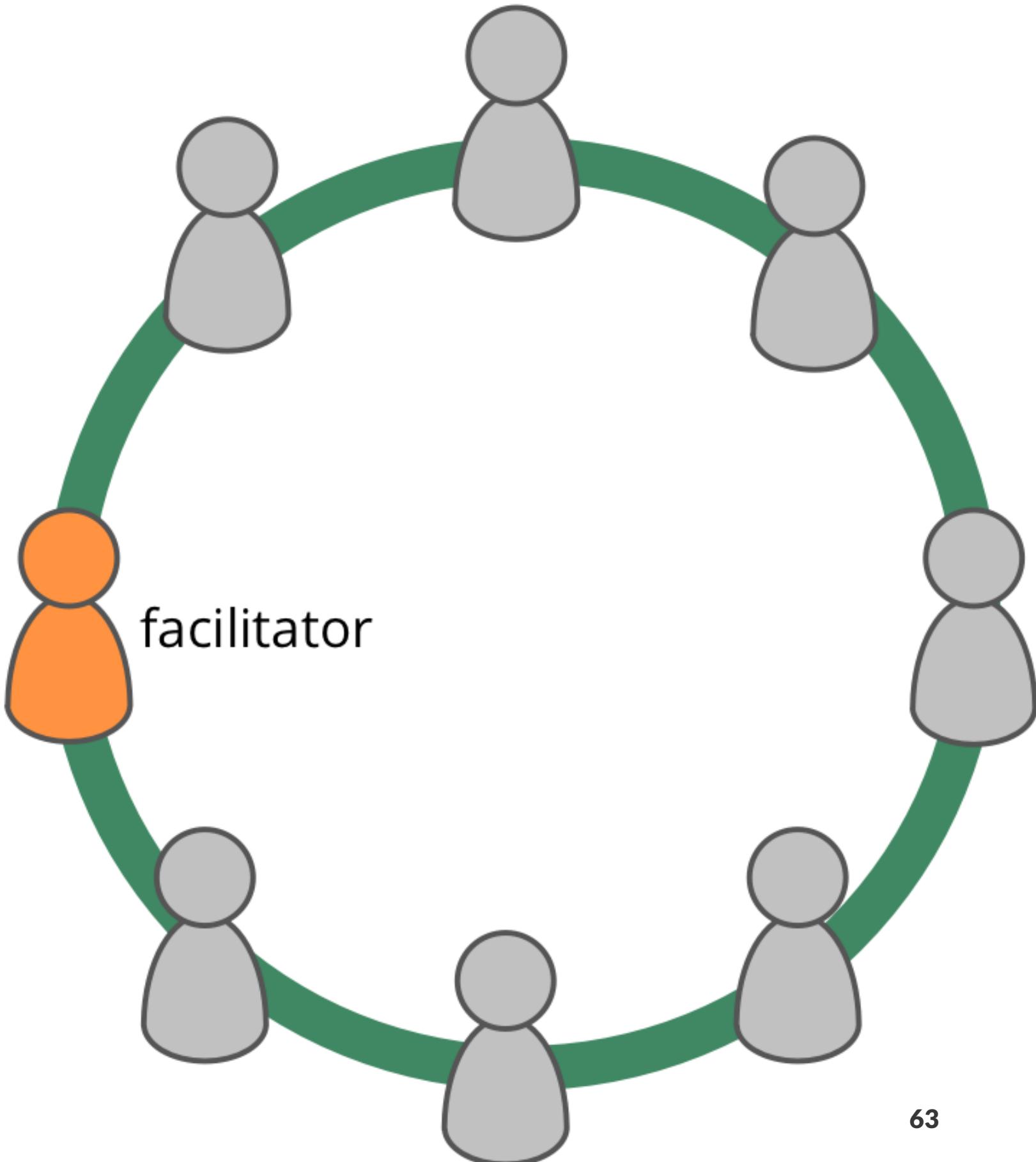
Agree On Values (cont.)

- values offer guidance to determine appropriate action, even in the absence of explicit agreements
- defining values is a **strategy** that supports effectiveness of an organization:
 - reduces potential for **misunderstanding**
 - **aligns** decision making and action
 - **attracts new members, partners and customers** who are aligned with the organization
- values are an agreement and thus subject to **regular review**

Pattern 3.4: Governance Facilitator (Role)

A governance facilitator:

- is accountable for ensuring governance meetings are facilitated, stay on track and are evaluated
- is (usually) selected by a group from among its members
- familiarizes themselves with the governance backlog
- often invites others to facilitate some agenda items



Governance Facilitator (cont.)

When using S3 for governance, the facilitator familiarizes themselves with the following patterns:

- rounds
- proposal forming
- consent decision making
- role selection
- evaluate meetings
- resolve objections
- peer reviews

Pattern 3.5: Breaking Agreements

- is sometimes **necessary**...
- ...but may come at a **cost** to the community
- be accountable!
 - **clean up** disturbances
 - **follow up** ASAP with those affected or accountable
 - **initiate changes** instead of repeatedly breaking the same agreement

Pattern 3.6: Contracting And Accountability

When entering into formal or informal agreements with others:

- ensure all parties understand what's expected of them and intend to keep to the agreement
- verify the agreement is beneficial to all parties, and that expectations are realistic

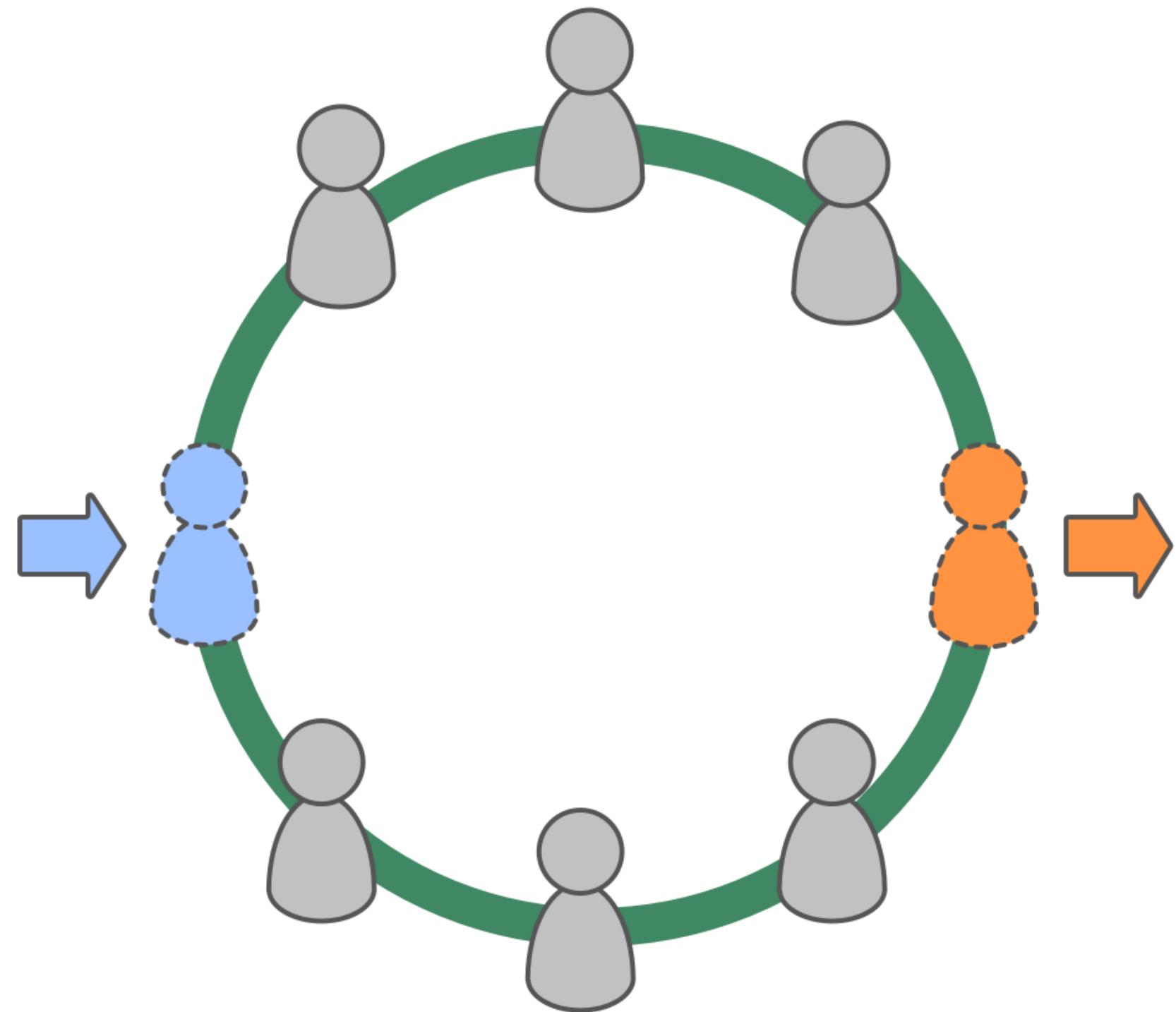
Be accountable for breaking agreements.



Contracting And Accountability (cont.)

To preserve organizational culture, maintain self-accountability and help new members of an organization or circle have a smooth start:

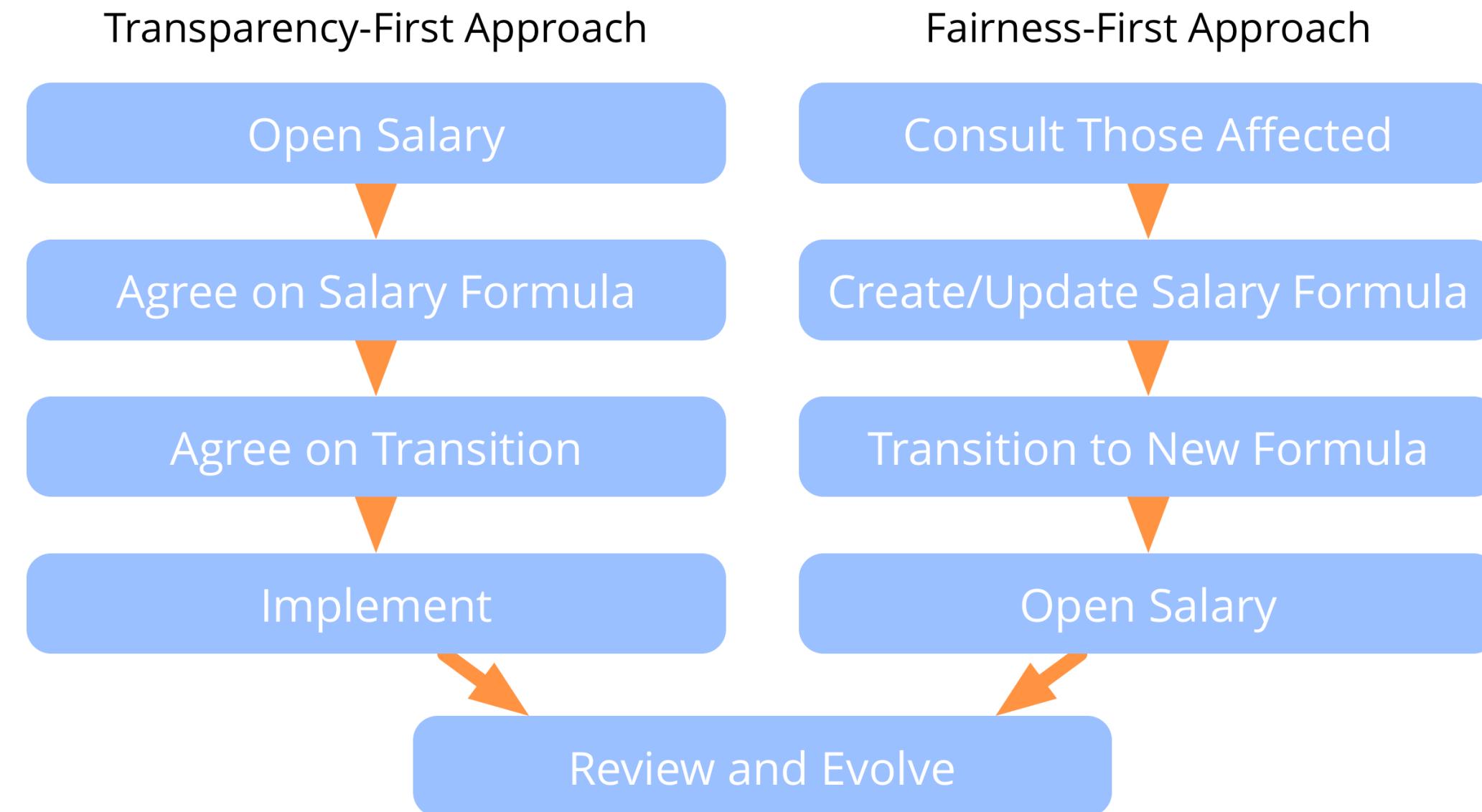
- define expectations for new members (both cultural fit and the skills required)
- align contract with both organizational culture and legal requirements
- consider a probationary period
- have clear procedures for breaches of contract



Pattern 3.7: Transparent Salary

- transparent salaries need to be fair
- fairness has several orthogonal dimensions
- perception of fairness is specific to organizational context
- consider members and relevant stakeholders (e.g. investors)
- create a salary formula:
 - fixed: subsistence guarantee
 - variable: fair distribution of gains and costs
- consider remuneration for changing roles
- create strategy for transitioning towards new contracts and compensation agreements

Two Ways of Opening Salaries



Pattern 3.8: Support Role

Apply the role pattern to external contractors

- clarify and describe driver for the role
- create domain description
- implement a selection process
- limit term of the contract
- build in regular peer reviews

Support roles may be operational only, and external contractors consent to account for their role.



Pattern 3.9: Bylaws

Secure S3 principles and patterns in your bylaws as needed to protect **legal integrity** and **organizational culture**

Consider:

- consent and equivalence in decision making
- selection process for leadership roles
- organizational structure, values and principles
- influence of owners or shareholders
- sharing gains and costs



Pattern 4.1: Delegate Influence

Decentralize power to influence within defined constraints. Enable people to decide and act for themselves in response to organizational drivers.

The delegator supports people in delivering value by:

- defining domains of accountability and autonomy clearly
- ensuring ongoing learning and development
- providing support as needed

Adjust constraints incrementally, considering capabilities, reliability and outcome.

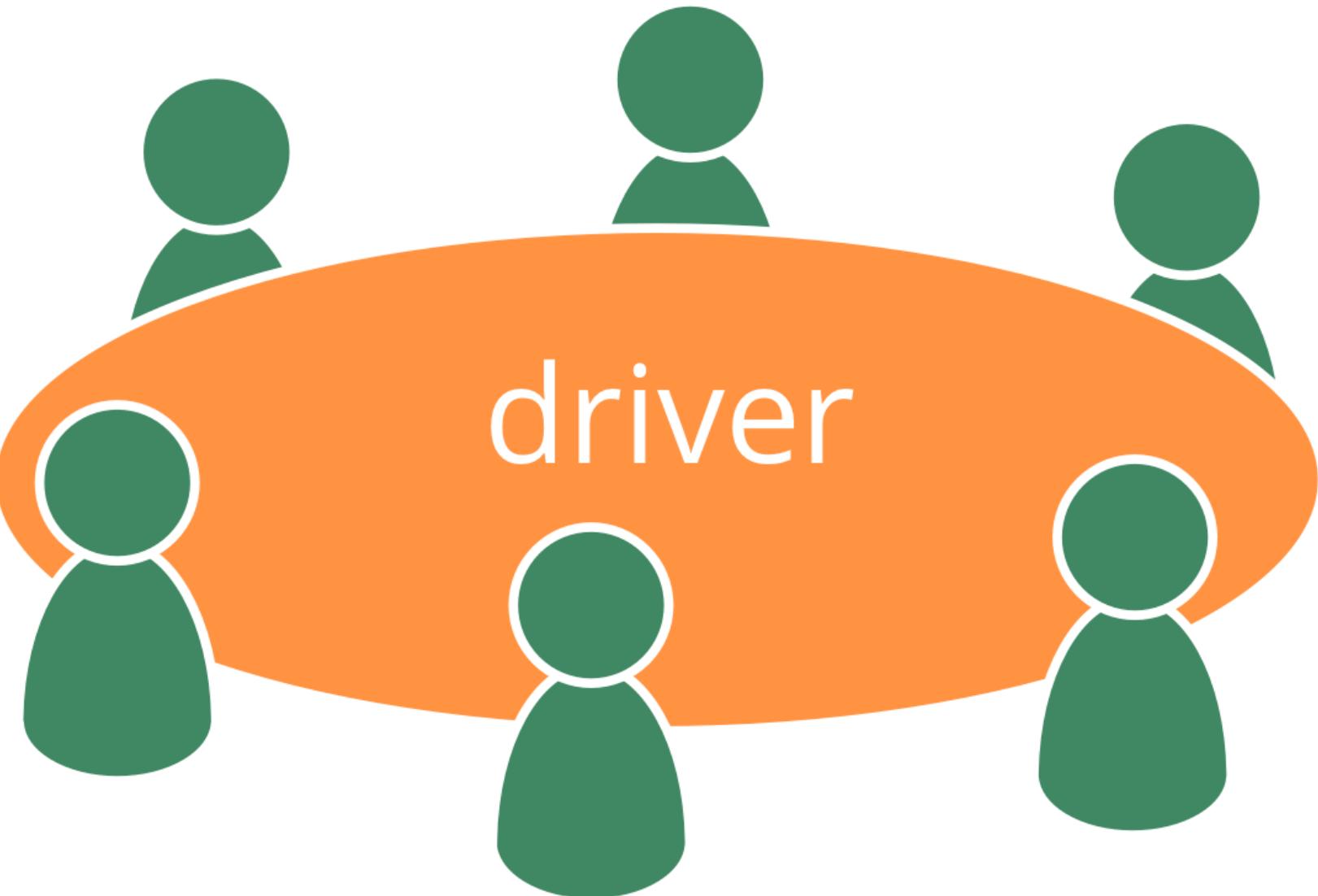
Decentralize as much as possible, retain as much influence as necessary.

Pattern 4.2: Circle

A **circle** is an equivalent, semi-autonomous and self-governing group of people collaborating to respond to a driver.

A circle:

- may be permanent or temporary
- may be self-organizing
- is accountable for its own development and its body of agreements



Circle (cont.)

- **semi-autonomous**
 - a circle acts within the constraints of their domain
 - each circle can create value autonomously
- **self-governing:**
 - a circle continuously decides what to do to account for their domain, and sets constraints on how and when things will be done.

Pattern 4.3: Role

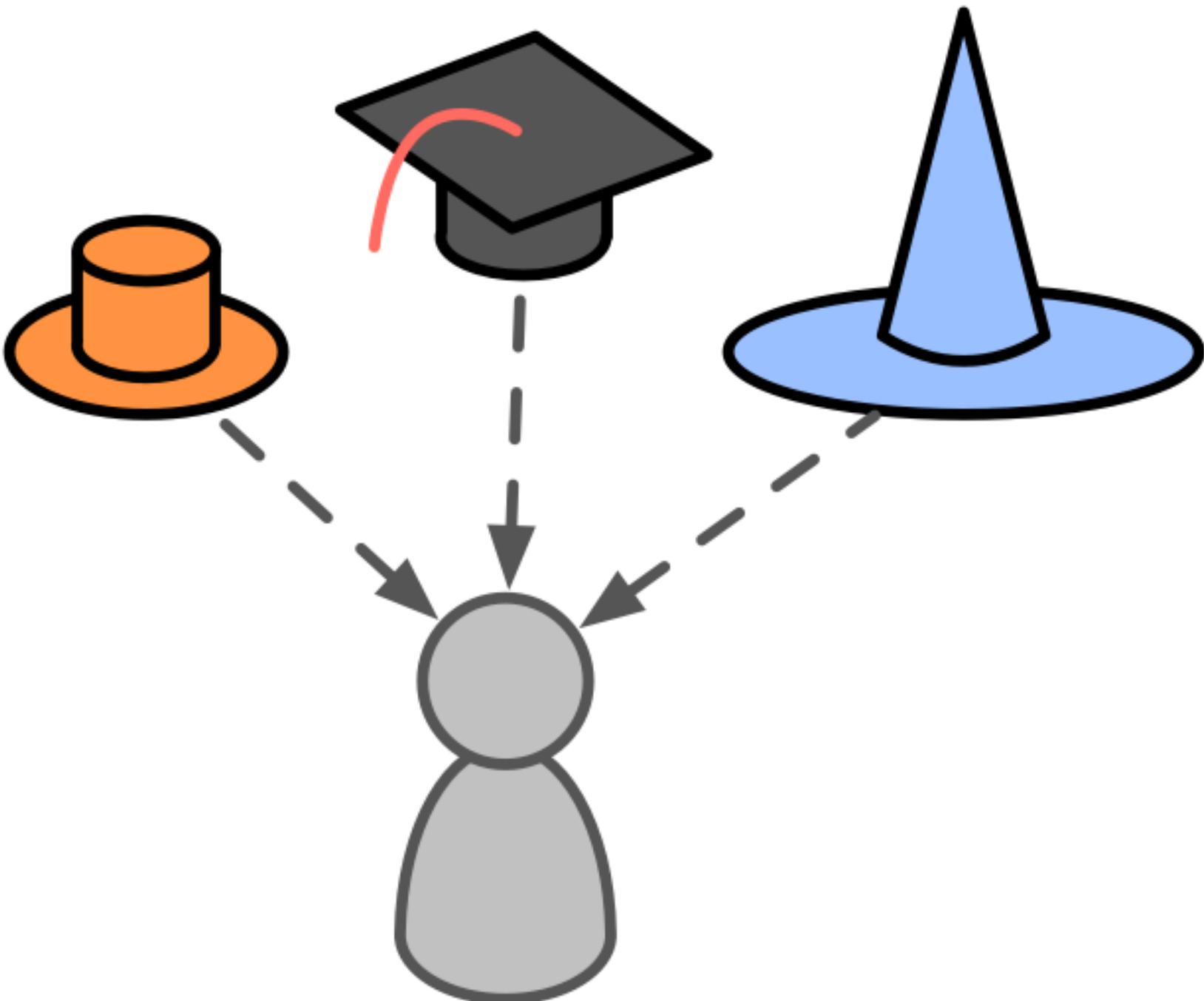
A **role** is a set of constraints for how an individual can account for a domain.

A **role keeper** (individual selected into a role) is autonomous to decide and act within these constraints.

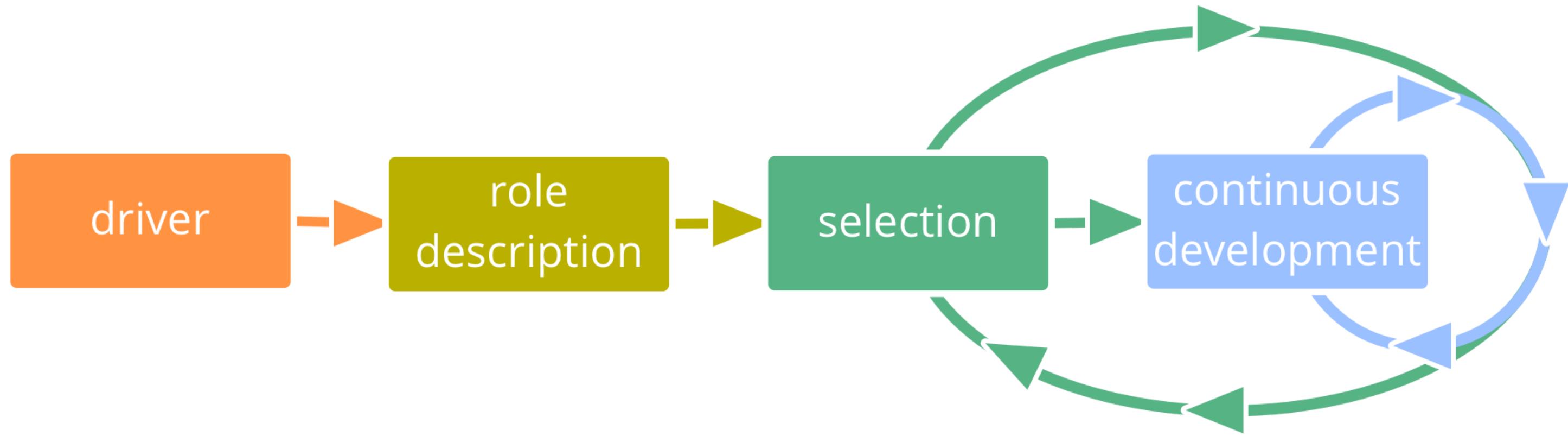
- people can be in more than one role
- selection is by consent and for a limited term
- the role keeper leads in creating strategy for how to account for the role's domain, checking for objections with the parent circle
- peers support one another to develop in the roles they fulfill

A role keeper may maintain a logbook and a governance backlog to evolve their approach towards delivering value.

Note: In S3, guidelines, processes or protocols created by individuals in roles are treated as agreements.



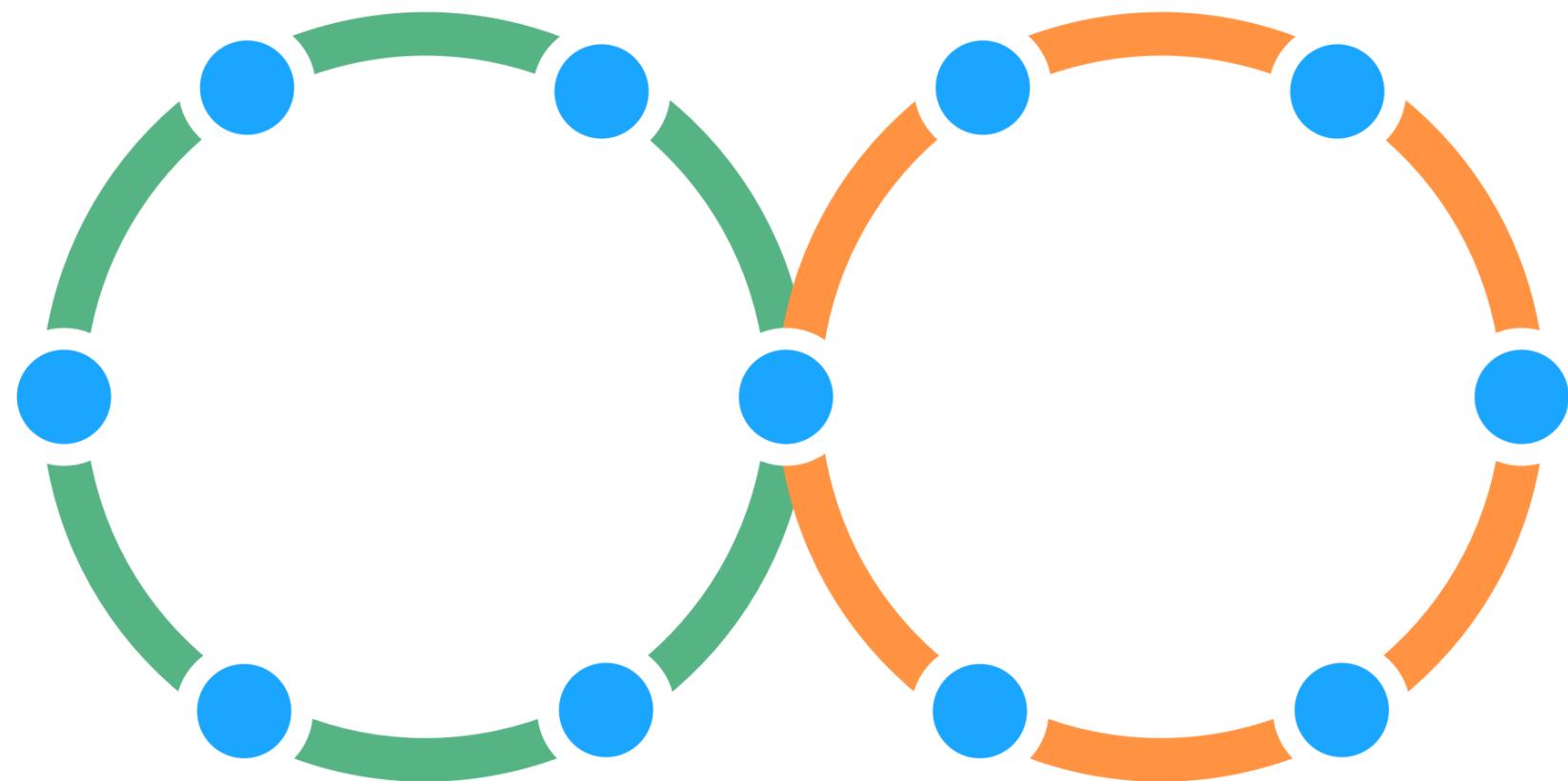
Role: one way to account for a domain



Pattern 4.4: Linking

Facilitate flow of information and influence between two groups.

A group selects one of its members to represent their interests in the governance decisions of another group.

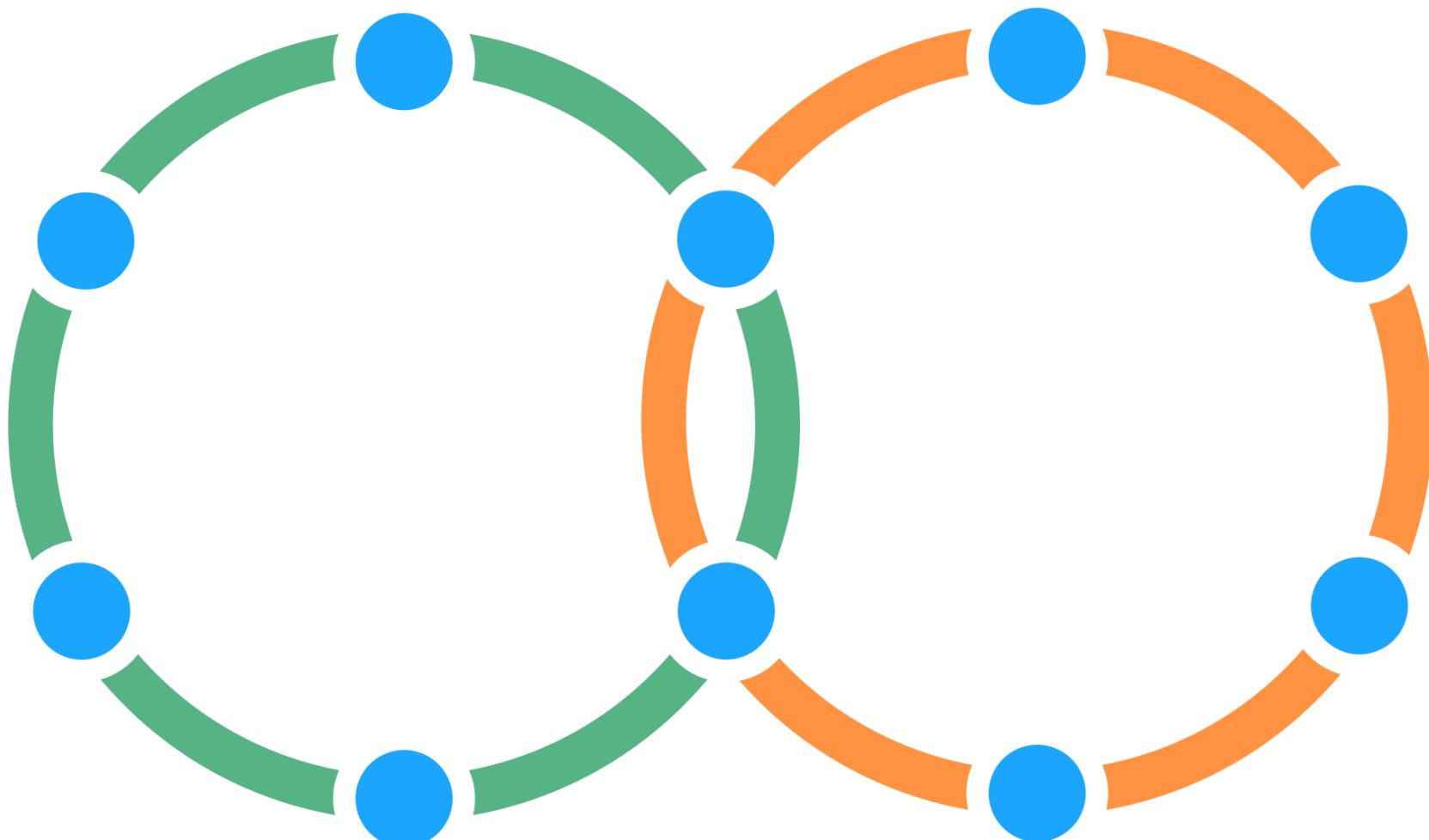


Pattern 4.5: Double Linking

Facilitate two-way flow of information and influence between two groups.

Two interdependent circles (or teams) each select one of their members to represent their interests in the governance decisions of the other group.

- creates equivalence between two groups
- can be used to draw out valuable information in hierarchical structures



Pattern 4.6: Representative

Representatives (a.k.a. links):

- stand for the interests of a circle (or team) in another circle
- are selected for a limited term
- participate as full members in the **governance decisions** of the circle they are delegated to, and can:
 - raise items for the agenda
 - participate in forming proposals
 - object to agreements and proposals (when there is reason to do so)



Pattern 5.1: Adapt Patterns To Context

Adapt and evolve S3 patterns to fit your specific context.

- ensure everyone affected by adaptation:
 - understands why it is necessary to adapt the pattern
 - is present or represented when doing so
- use S3 principles as a guide for adaptation
- run experiments with adaptations for long enough to learn about benefits and potential pitfalls
- consider sharing valuable adaptations with the S3 community

Understand Context

Understand Pattern

Proposal for Adaptation

Consent to Adaptation

Test Adaptation

Evaluate and Evolve

Pattern 5.2: Create a Pull-System For Organizational Change

Create an environment that invites and enables members of the organization to drive change.

Change things when there is value in doing so:

- bring in patterns that solve current and important problems
 - don't break what's already working!
 - meet everyone where they are...
 - ...and let them choose their own pace
- consider making all change voluntary!

Pattern 5.3: Be The Change

Lead by example.

Behave and act in the ways you would like others to behave and act.

Pattern 5.4: Invite Change

A way for individuals to initiate and facilitate change.

- be the change you want to see
- use and adapt S3 patterns to address drivers when it's helpful to do so
- tell the story about how and why you are using patterns from S3, including documenting outcomes, successes and failures
- invite others to experiment with you

Pattern 5.5: Open S3 Adoption

Invite everyone to evolve to create and run experiments for evolving the organization.

- identify the driver for pulling in S3 patterns
- schedule regular open space events:
 - invite all members to create and run experiments
 - define constraints for experiments: e.g. S3 principles
 - review and learn from experimentation in the next open space
 - repeat



Pattern 5.6: Continuous Improvement Of Work Process With S3

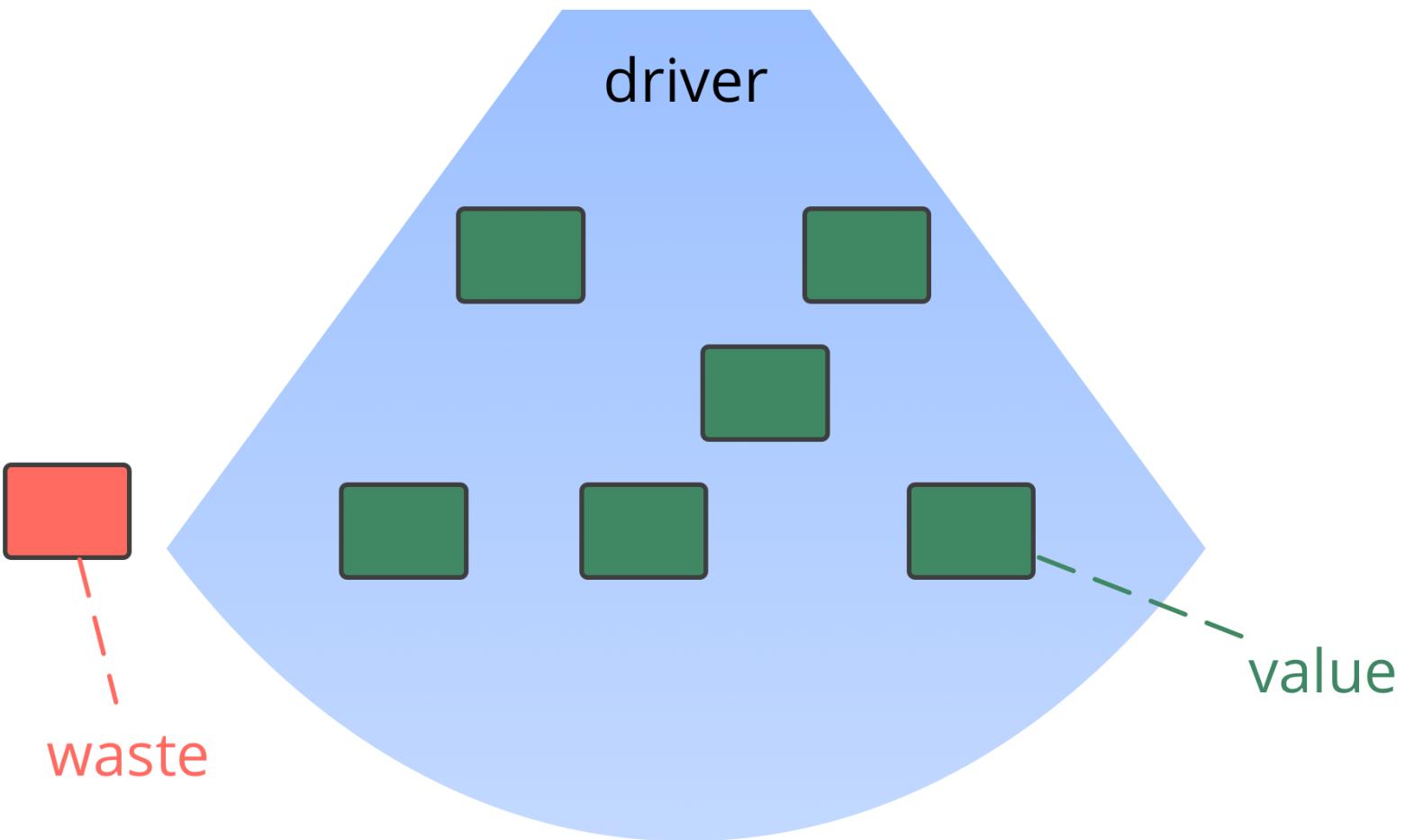
To reveal drivers and establish a metrics-based pull-system for organizational change

- introduce the principle of consent and *Navigate Via Tension* to evolve work process in one team
- consider selecting a facilitator and agreeing on values
- trigger continuous improvement (e.g through Kanban)
- team members pull in S3 patterns as required
- expand the scope of the experiment iteratively
- intentionally look out for impediments

Waste And Continuous Improvement

Waste is anything not necessary for - or standing in the way of - effective response to a driver.

- waste exists in various forms and on different levels of abstraction (tasks, processes, organizational structure, mental models...)
- establishing a process for ongoing elimination of waste enables natural evolution of an organization towards greater effectiveness
- adaptation to changing context is built into the process

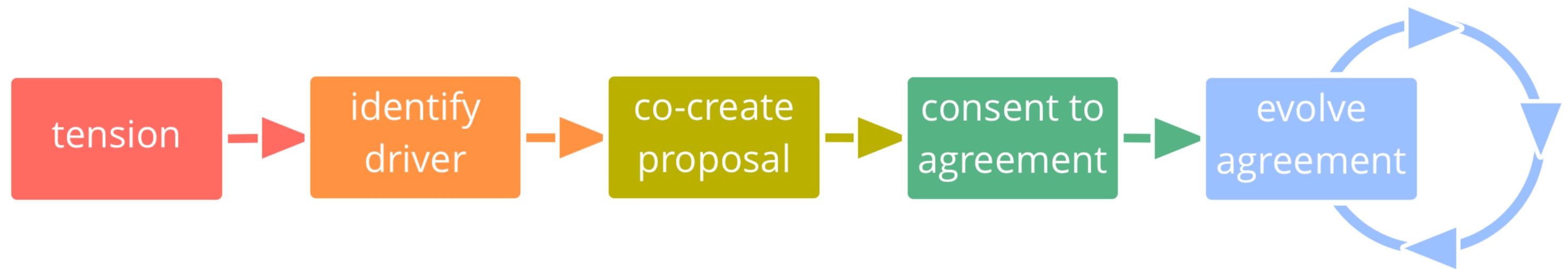




S3 promotes a hypothesis-driven approach to decision making



Agreement Life-Cycle

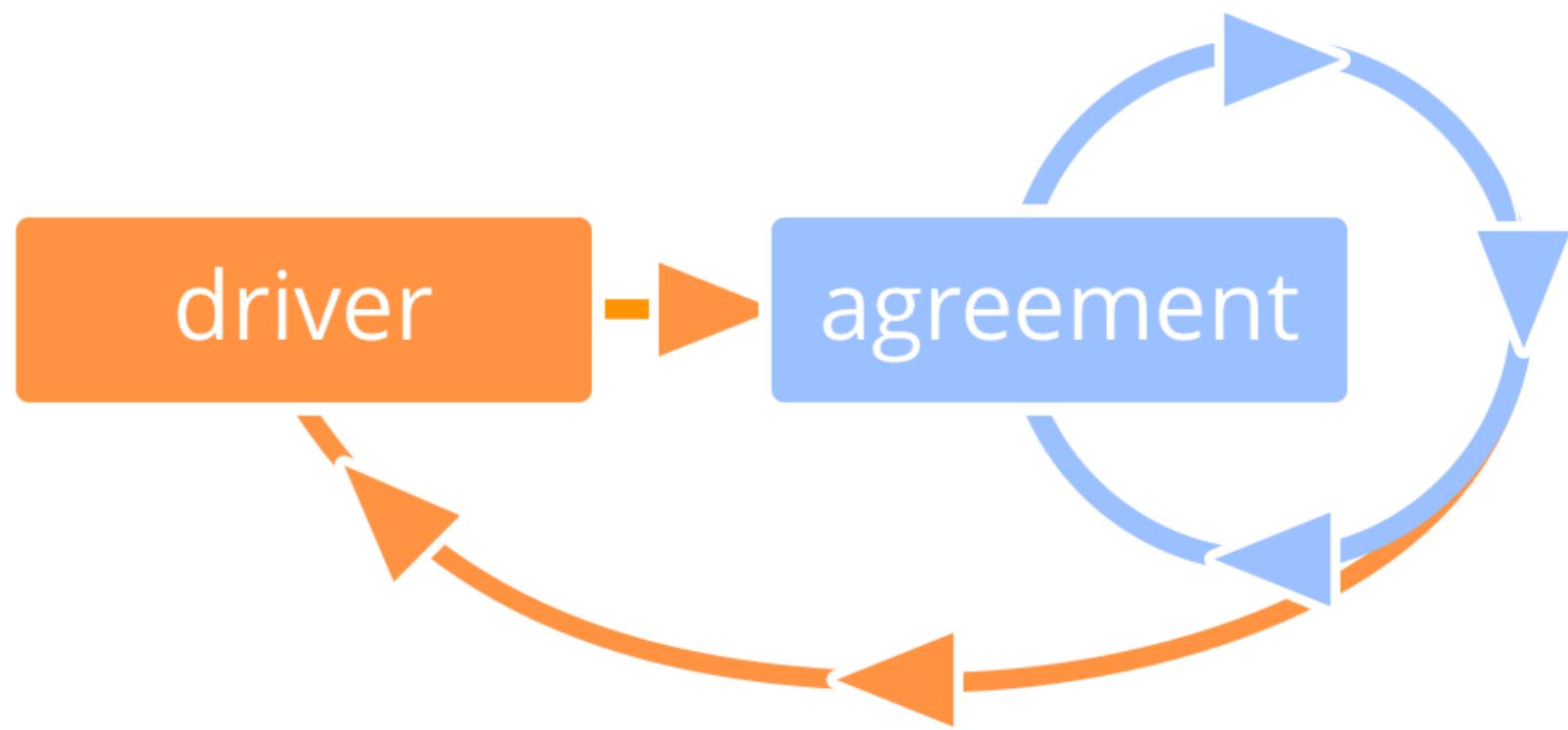


Pattern 6.1: Agreement

An **agreement** is an agreed upon guideline, process or protocol designed to guide the flow of value.

- agreements are created in response to drivers
- agreements are the **accountability of the people** that make them
- agreements are **regularly reviewed**

Note: In S3, guidelines, processes or protocols created by individuals in roles are treated as agreements.



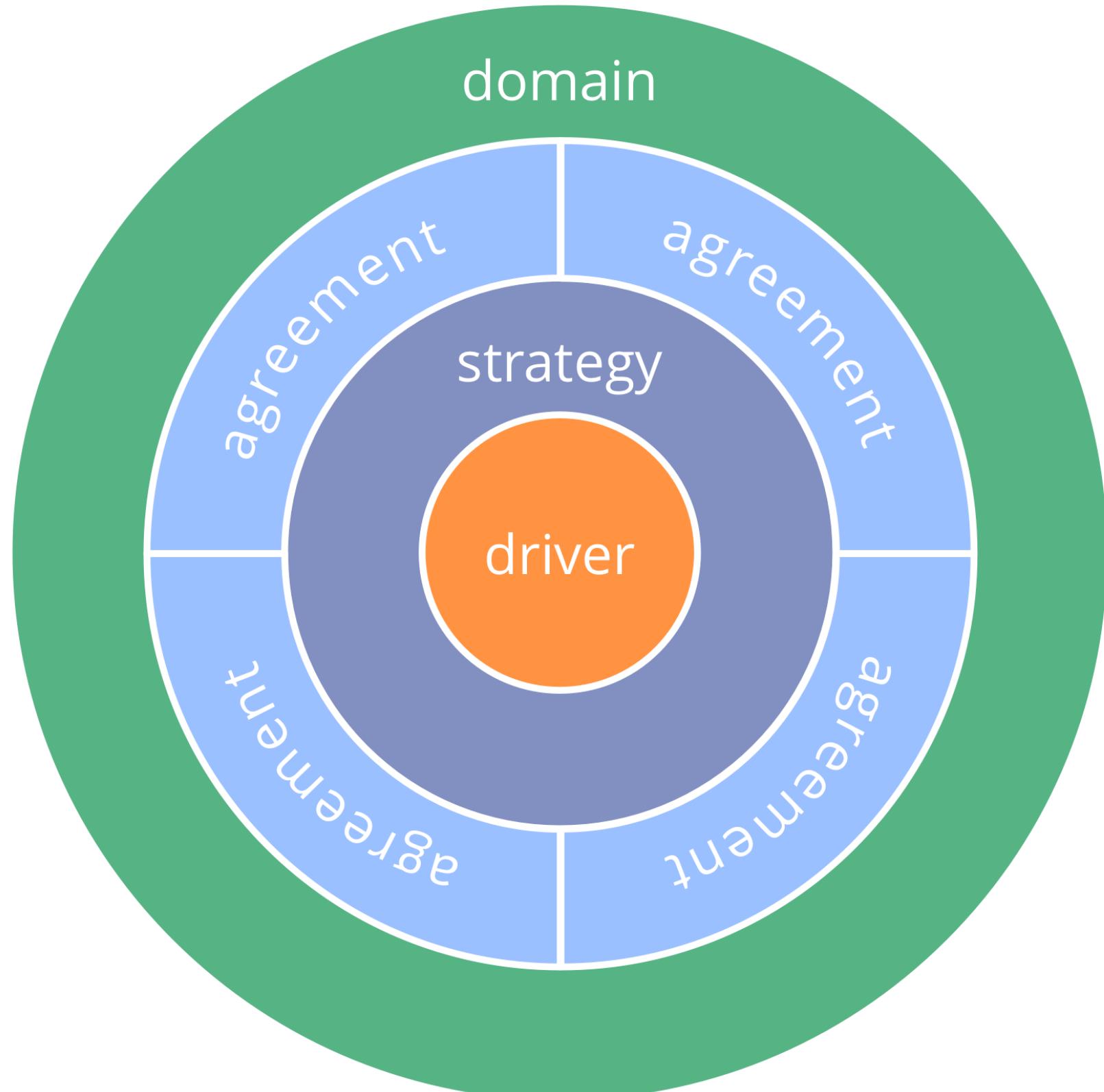
Template for Agreements

Title of Agreement		Appendix
Date/Version	Review Date	Background Information
Who is accountable?		Previous Versions
Driver		References
Description		
Evaluation Criteria		
(Concerns)		

Pattern 6.2: Develop Strategy

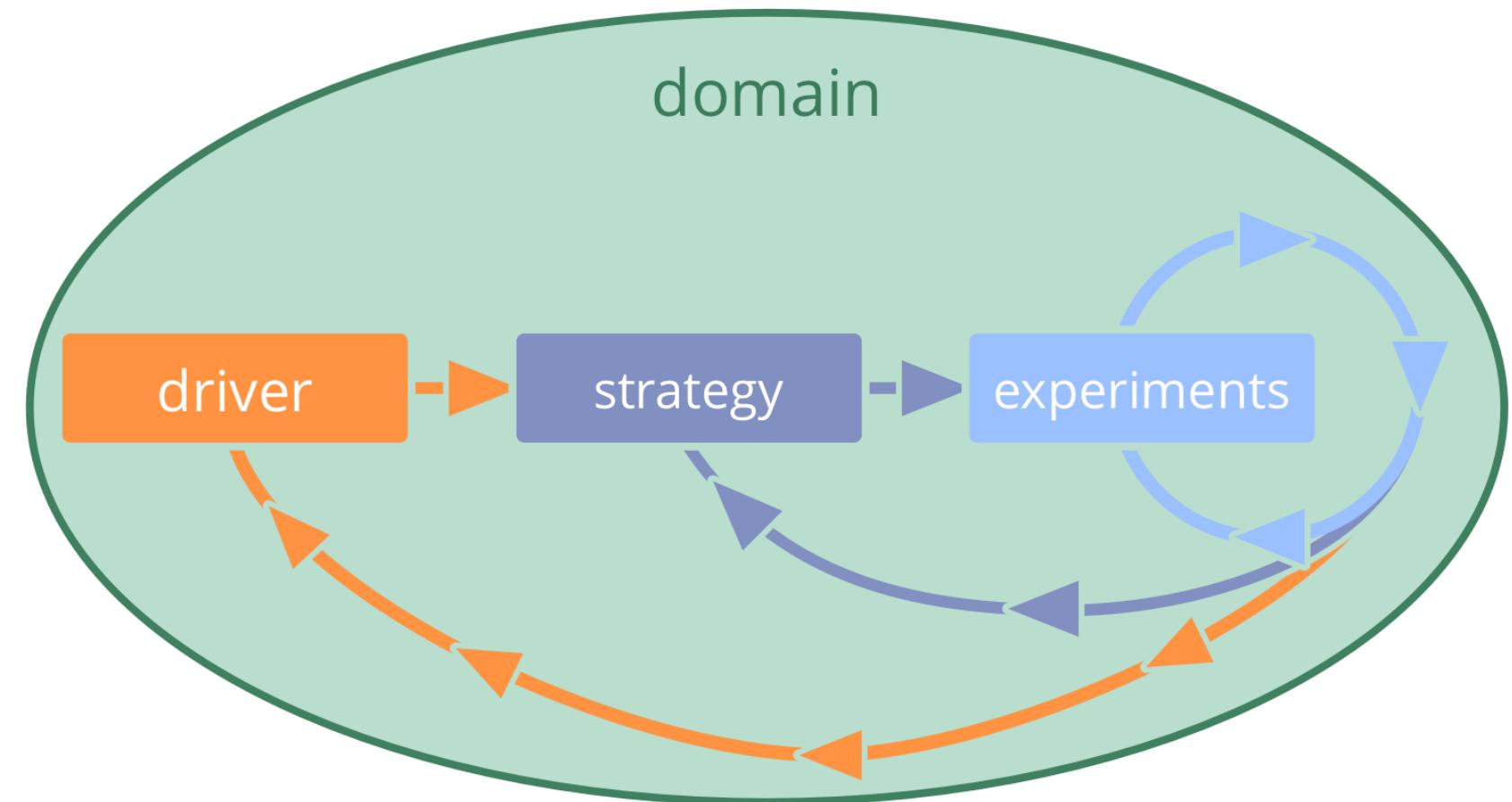
A **strategy** is a high level approach how people will create value to successfully account for a domain.

- an organization, group or role keeper develop their own strategy
- a strategy often includes a description of the intended outcome
- as the delegator shares accountability for the domain, it's valuable they review the strategy, identify potential impediments and suggest improvements
- strategy is a shared agreement between delegator(s) and delegatee(s) that is regularly reviewed and updated as necessary (*pivot or persevere*)



Strategy (cont.)

Strategies are implemented and refined through experimentation and learning.



Pattern 6.3: Clarify Domains

A clear understanding of people's area of accountability and autonomy enables greater efficiency, effective collaboration and agility throughout the organization.

A simple way to clarify domains is with a **domain description** that contains:

- primary driver
- key responsibilities
- constraints
- evaluation criteria for peer review
- term (for a role)
- (previous versions)

Name of the Domain

Date/Version

Review Date

Primary Driver



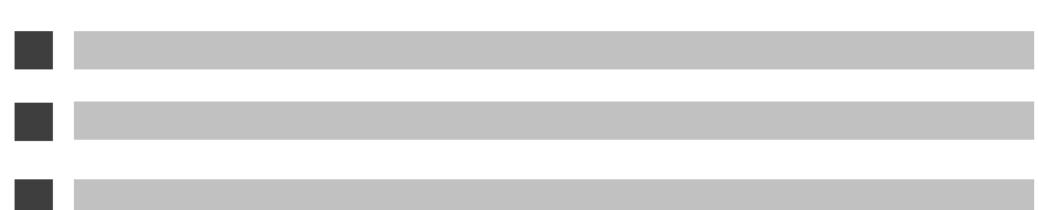
Key Responsibilities



Constraints

- preferred/required skills, qualities, experience
- resources, budget
- time, privileges

Evaluation Criteria for Peer Review



Clarify Domains (cont.)

Domain descriptions can be created for a role, position, circle, team, open domain, department, unit, or the whole organization.

Start by clarifying existing domains and consider defining new ones.

Pattern 6.4: Intended Outcome

- a concise description of the expected result of an agreement, action, project or strategy
- specific *Evaluation Criteria* and metrics can be helpful for reviewing the actual outcome

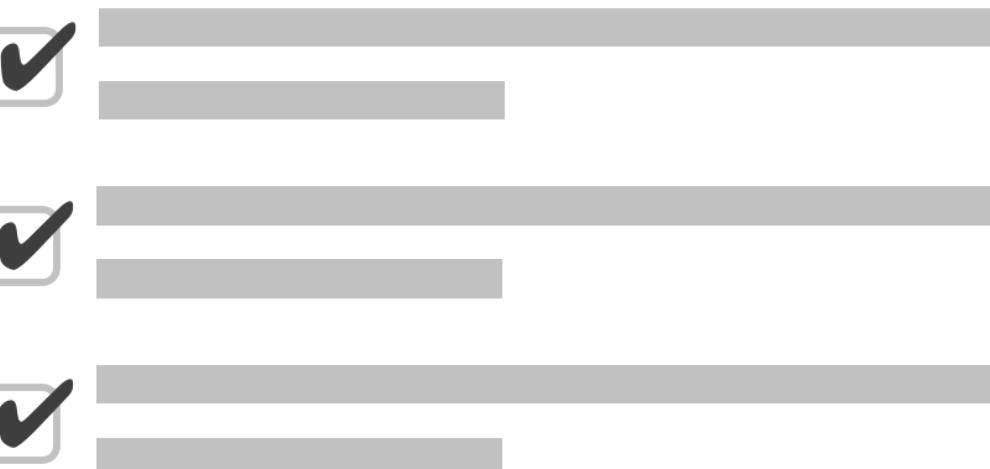
Intended Outcome



Metrics



Evaluation Criteria



Pattern 6.5: Describe Deliverables

A **deliverable** is something which is provided as a result of an agreement in response to a driver. Deliverables include products, raw materials, services, experiences and transformation.

In the context of an agreement, clearly describing deliverables supports shared understanding:

- include the necessary amount of detail
- reference other documents when helpful or necessary

Describe Deliverables (cont.)

Explicitly defining deliverables can be useful for improving:

- organizational strategy
- circle strategy
- development plans
- domain descriptions
- any other agreement (e.g. business goals, process policy, customer communication)

Pattern 6.6: Evaluation Criteria

Defining evaluation criteria can help to understand whether or not an agreement has the desired effect.

- go for **simple and unambiguous** criteria and document them (to avoid discussion when reviewing your agreements)
- define **actionable metrics** to continuously track effects and spot deviations from intended outcomes

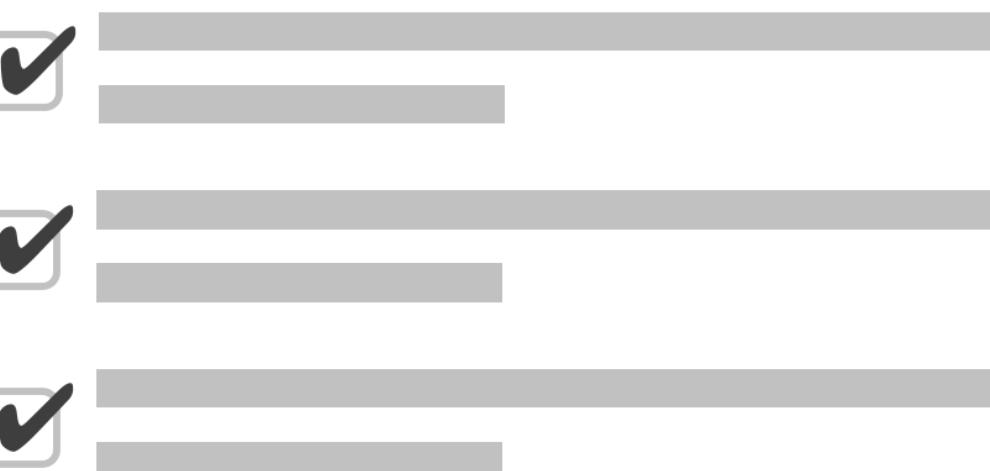
Intended Outcome



Metrics



Evaluation Criteria



Pattern 6.7: Logbook

A logbook is a (digital) system to store all information relevant for running an organization and its teams. The logbook is accessible to all members of an organization, and information is kept confidential only when there is good reason to do so.

Common platforms for logbooks are Wikis (e.g. Dokuwiki or MediaWiki), Content Management Systems (e.g. Wordpress), Google Drive, Evernote or Trello etc.

Logbook Contents

- Organization:
 - primary driver, strategy and organizational values
 - organizational structure (domains and connections)
 - agreements
- Circle:
 - circle description and strategy
 - agreements (including delegatees' domain descriptions, strategies and development plans)
 - backlogs and other information relating to a circle's work and governance

Logbook Contents (cont.)

- Personal logbooks
 - domain descriptions, strategies and development plans
 - governance and operational backlogs for roles
 - decisions related to delivering value in a role

Pattern 6.8: Logbook Keeper (Role)

The logbook keeper is accountable for maintaining a circle's logbook by:

- recording details of agreements, domain descriptions, selections, evaluation dates, minutes of meetings etc.
- organizing relevant information and improving the system when valuable
- keeping records up to date
- ensuring accessibility to everyone in the circle (and in the wider organization as agreed)
- attending to all technical aspects of logbook keeping



Pattern 7.1: Governance Meeting

Groups of people meet at regular intervals to create and evolve agreements relating to drivers they are accountable for.

A governance meeting is usually:

- facilitated
- prepared in advance
- time-boxed for a duration of 90-120 minutes
- scheduled every 4 weeks

Opening Round



Administrative Matters

Agenda Items

Meeting Evaluation

Closing

A typical governance meeting includes:

- opening round: attune with each other and to the driver of the group
- administrative matters
 - consent to last minutes, date for next meeting, etc.
 - check for last-minute agenda items and consent to agenda
- agenda items
- meeting evaluation: reflect on your interactions, celebrate successes and share suggestions for improvement
- closing

Typical agenda items include:

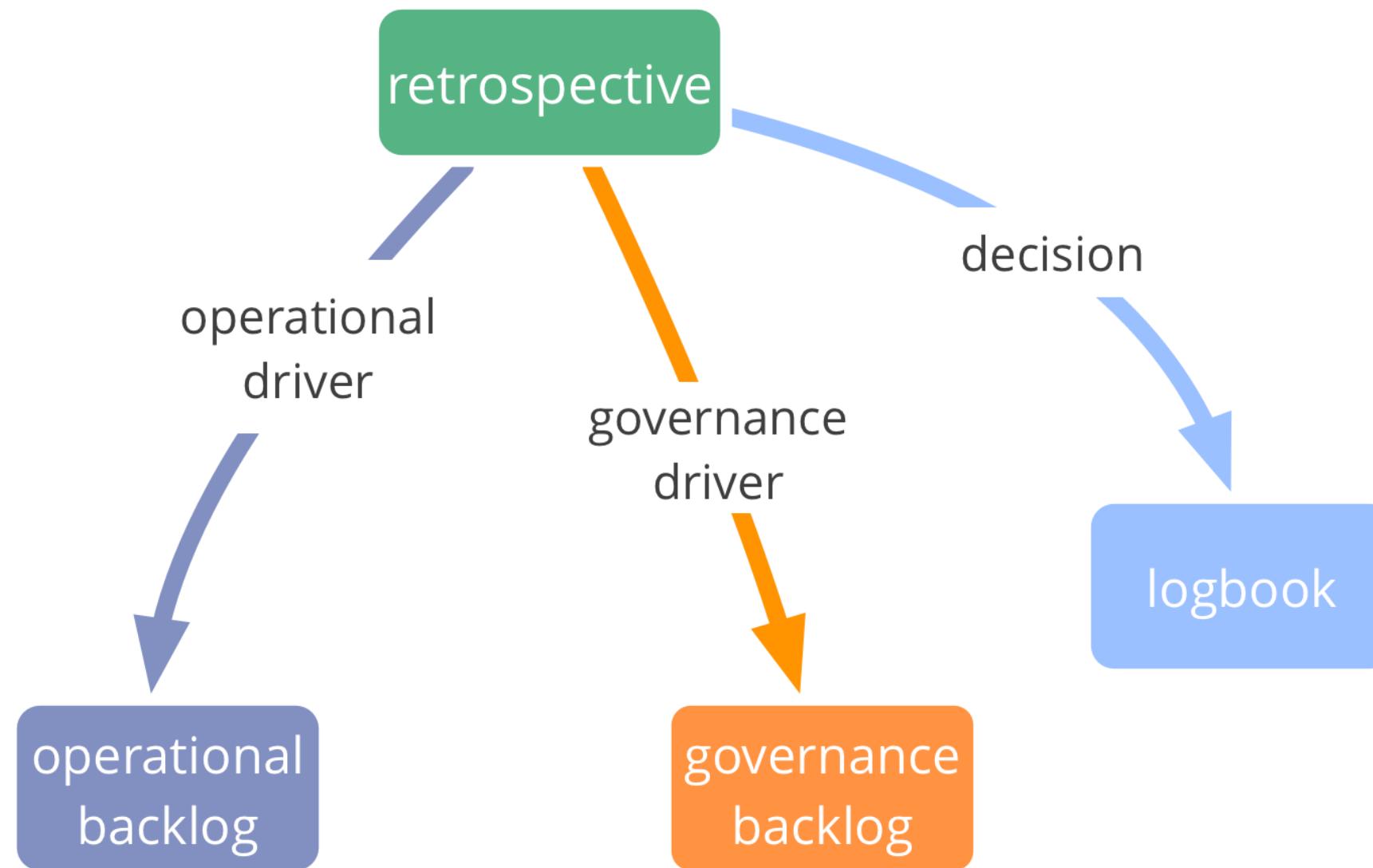
- any short reports
- evaluation of existing agreements due review
- new drivers requiring decisions to be made, including:
 - understanding and agreeing on situations that require attention
 - forming proposals and making agreements
 - creating and defining new roles and teams
 - reviewing existing roles and teams
 - selecting people to roles

Pattern 7.2: Retrospective

Building in continuous improvement of work process through reflection and learning from past experience.

- output: changes to work process, new tasks, on-the-fly agreements, and drivers requiring an agreement
- facilitated meeting (~1hr)
- regular intervals (1-4 weeks)
- adapt to situation and context

Output of a Retrospective



Five Phases of a Retrospective Meeting

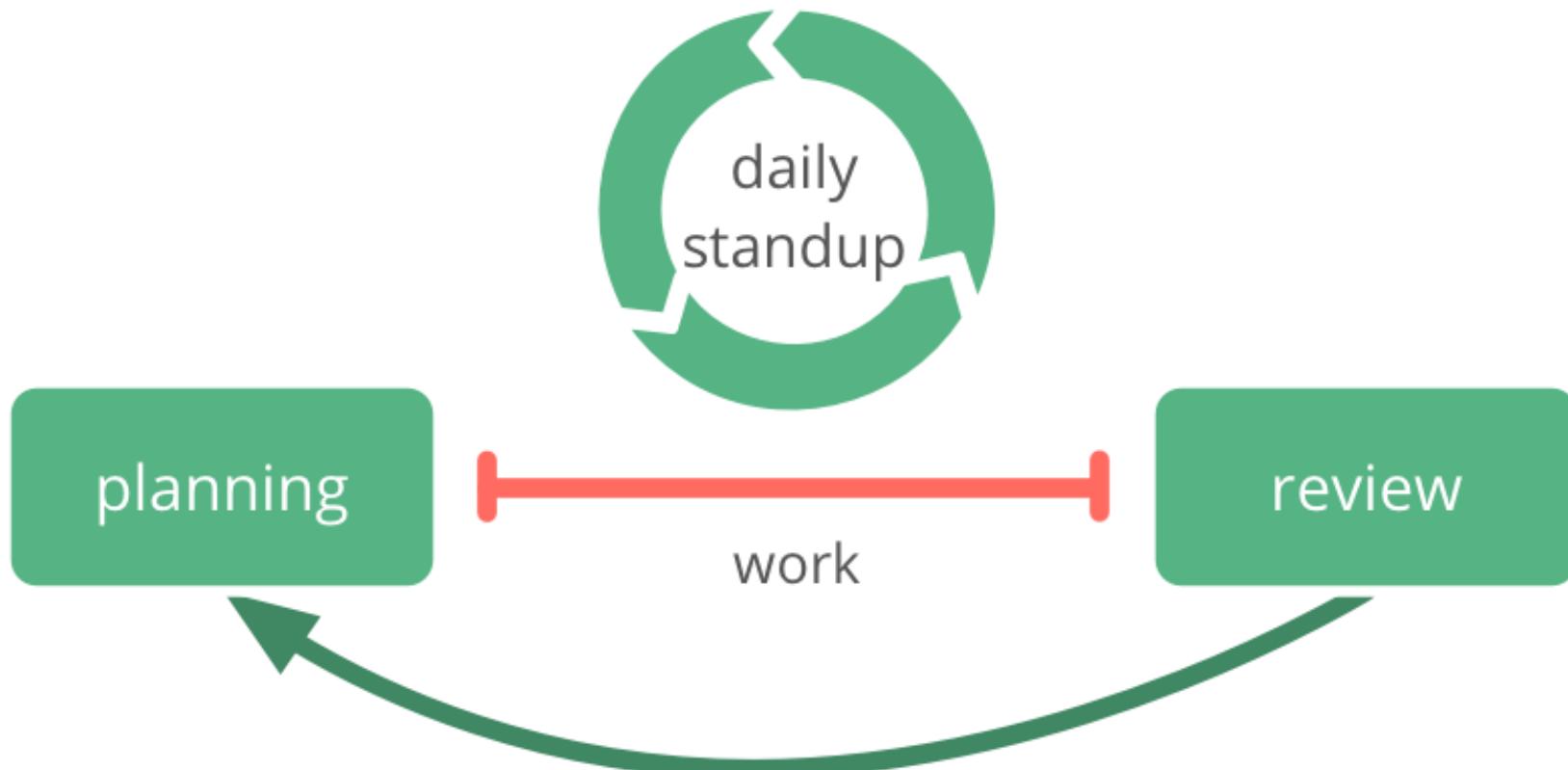
1. Set the stage
2. Gather data
3. Generate insights
4. Decide what to do
5. Close the retrospective

Many different activities for each phase can be found at plans-for-retrospectives.com

Pattern 7.3: Daily Standup

A meeting to coordinate work, facilitate learning, improve productivity and effectiveness

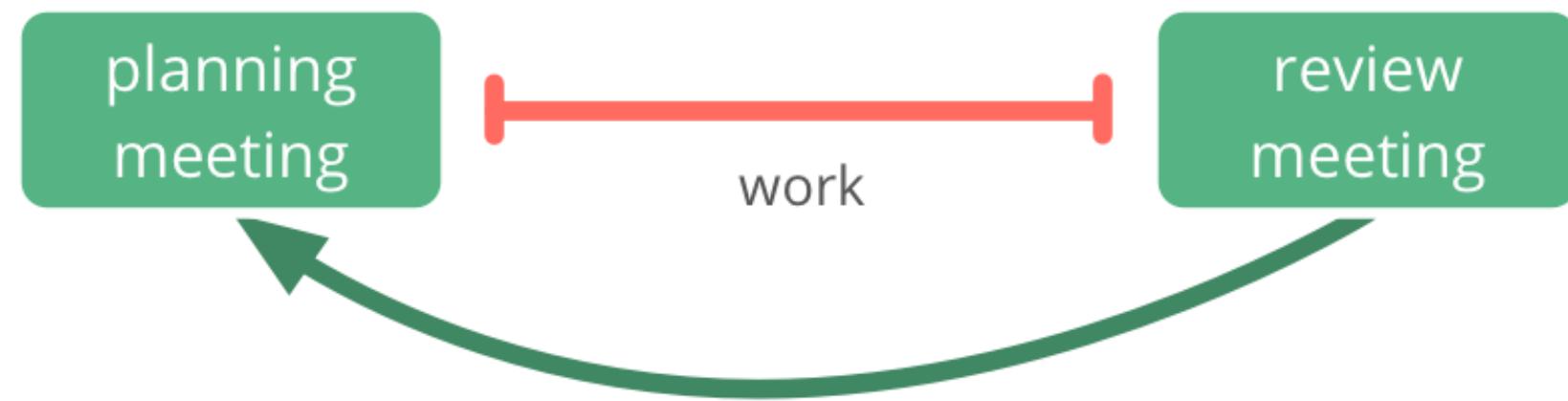
- time-boxed (usually 15 minutes)
- held daily at the same time
- the group gathers around a visible project management board/tool for:
 - coordination of daily work
 - addressing impediments/blocks
 - adaptation of existing agreements or creation of new agreements on the spot



Pattern 7.4: Planning And Review Meetings

People meet at regular intervals (1-4 weeks) in time-boxed meetings to plan and review work.

- select and estimate work items for the next iteration in a planning meeting
- review completed work items and decide on re-work and changes for the next iteration in a review meeting



Pattern 7.5: Coordination Meeting

Meet on a regular basis (usually weekly) for reporting on and coordinating work.

- facilitate the meeting and use rounds instead of discussions where valuable
- if possible, compile the agenda before the meeting
 - include any prerequisites for attendees to prepare
 - further items may come up when hearing status reports

Coordination Meeting

- status reports:
 - circle metrics (if any)
 - projects and tasks
- agenda items:
 - sharing of information
 - add or update tasks or projects
 - propose new or updated agreements

Opening Round



Status Reports

Agenda Items

Meeting Review

Closing Round





Pattern 8.1: Rounds

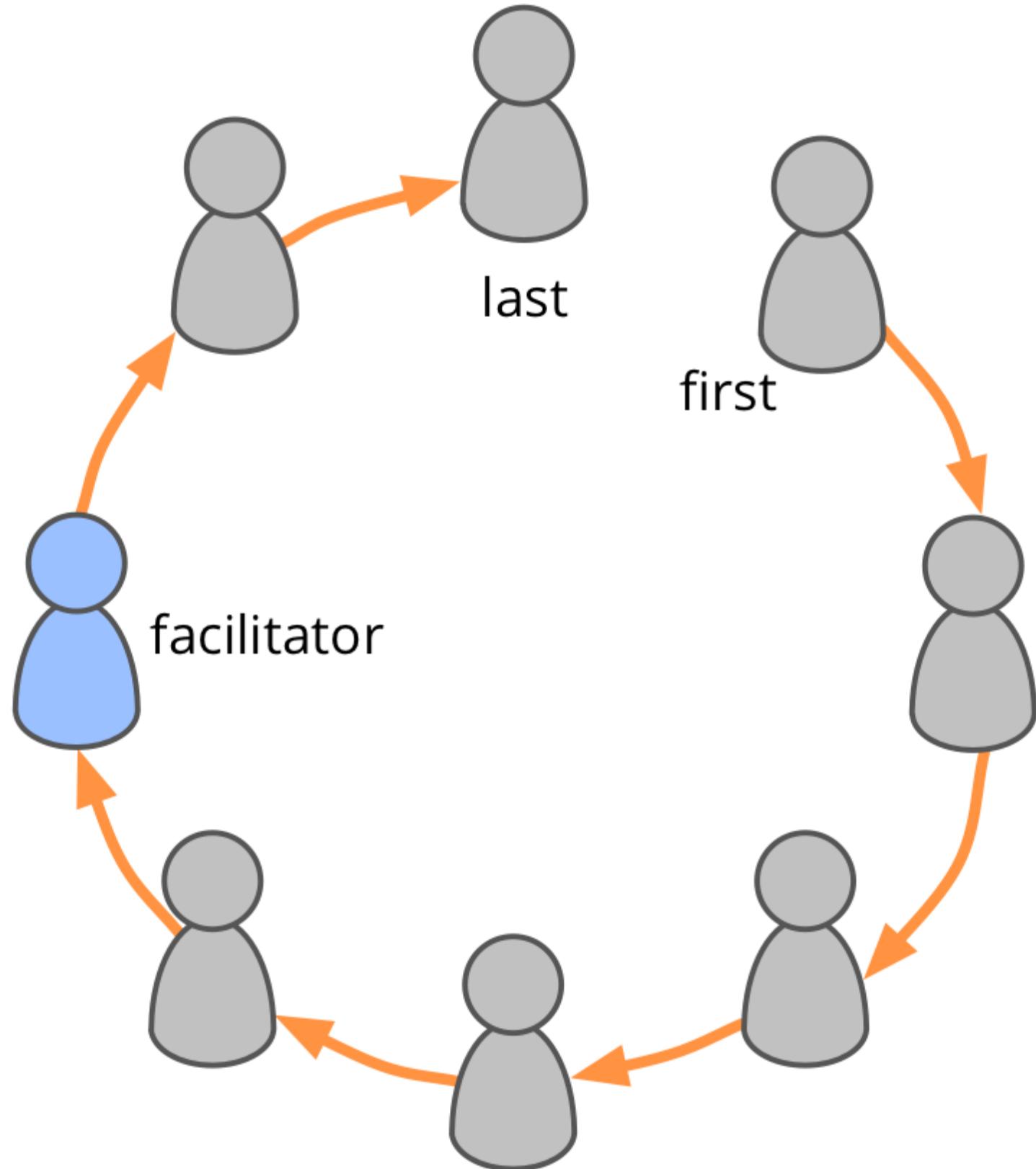
A group facilitation technique to maintain equivalence.

1. Pick a random person to start

- begin each round with a different person to maintain equivalence

2. Go around the circle giving everyone the chance to speak

There are a number of ways that experienced groups can fast track certain rounds.



Pattern 8.2: Facilitate Meetings

Choose someone to facilitate a meeting. Even an inexperienced facilitator can help to focus a meeting and make a positive difference.

- prepare an agenda of topics
- select a facilitator who:
 - facilitates a suitable activity or format for each topic
 - holds the space, keeps the time and navigates the agenda during the meeting
 - facilitates an evaluation of the meeting at the end

Pattern 8.3: Evaluate Meetings

Take time for learning at the end of each meeting or workshop.

Reflect on interactions, celebrate successes and share suggestions for improvement.

- before the closing round
- reserve 5 minutes for 1 hour, and 15 minutes for a full-day workshop
- record learning and review before the next meeting
- short formats:
 - more of/less of/start/stop/keep
 - positive/critical/suggested improvements

Opening

Workshop/Meeting

Evaluate Interaction

Closing

Evaluate Meetings: Long Format

Ask everyone in a round to reflect on any or all of the following topics in a brief sharing:

- effectiveness and format
- facilitation and participation
- emotional tone
- appreciations and achievements (I liked...)
- growing edges and improvement suggestions (I wish...)
- wild ideas and radical suggestions (What if...)

Pattern 8.4: Meeting Host (Role)

The meeting host is accountable for preparation and follow-up of meetings, workshops or other events.

The role may be assigned temporarily (i.e. for one specific event) or for a duration of time.

Meeting Host: Responsibilities

- preparation
 - identify goals and deliverables
 - prepare and distribute agenda and schedule
 - estimate required time
 - identify and invite participants
 - schedule the meeting/workshop
 - book location (and transportation if required)
 - set up the space, provide required materials and information
 - ensure selection of a facilitator and a notetaker to record minutes, if appropriate
- follow-up
 - clean up location, return keys etc.
 - ensure minutes are distributed

Pattern 8.5: Governance Backlog

A governance backlog is a visible, prioritized list of items (drivers) related to governing a domain that require attention.

- upcoming reports
- decisions to make
- proposals to create and consider
- agreements for review
- selecting people for roles



Pattern 9.1: Backlog

A backlog (to-do-list) is a visible list of (often prioritized) uncompleted work items (drivers) that need to be addressed.

Types of backlog include:

- operations backlog
- sprint backlog
- product backlog
- impediments backlog

Backlog (cont.)

- **Implementation**
 - **analog backlog:** sticky notes on a wall, or index cards, magnets and whiteboard
 - **digital backlog:** e.g. Google Sheets, Trello, Kanban Flow, Jira

Elements of a (prioritized) backlog

- a **short description** or a driver statement
- a **unique reference number** (or link) for each work item
- (the **order of work items**)
- **dependencies** to other work items or projects
- **due date** (if necessary)
- (optional) a measure for **value**
- (optional) a measure for **investment** (often an estimate of time or complexity)

Pattern 9.2: Prioritize Backlogs

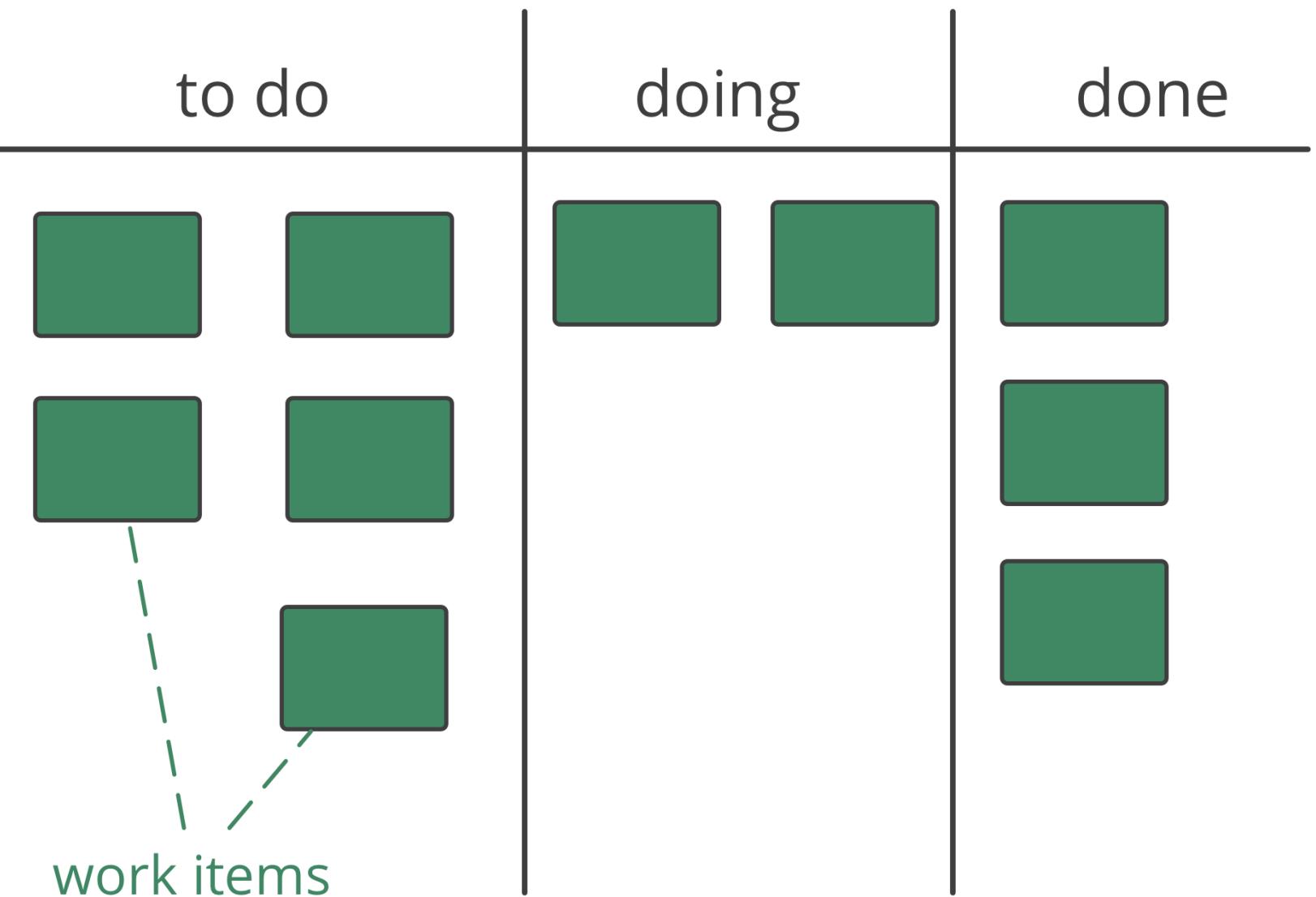
Order **all uncompleted work items** with the most important items first:

- work items are pulled from the top whenever there is new capacity
- no two items can be of equal importance, meaning it is necessary to agree on priorities and make tough choices
- **Benefits**
 - focus on most important items
 - shared understanding of priorities enables more effective collaboration

Pattern 9.3: Visualize Work

Transparency about the state of all work items currently pending, in progress or completed.

- valuable for self-organization and pull-systems
- system must be accessible to everyone affected
- **analog:** post-its on a wall, or index cards, magnets and white board
- **digital:** Trello, Kanbanery, Leankit, Jira, Google Sheets, etc.



Things to track:

- **types of work items** (e.g. customer request, project tasks, reporting tasks, rework)
- **start date** (and **due date** if necessary)
- **priorities**
- **stages** of work (e.g. "to do", "in progress", "review" and "done")
- impediments/blocks
- who is working on which items
- agreements and expectations guiding workflow (e.g. definition of done, policy, quality standards)
- use colors, symbols, highlights etc.

30.3.2017

due: 1.4.2017

Update the fiddly things
it doesn't break
somebody looks at it
sideways.

BLOCKED:
ask Carl about
deployment,
he's on on
holiday.

#37



Pattern 9.4: Pull-System For Work

- people pull in new items when they have capacity (instead of work being pushed at them)
- prioritize available work items to ensure that important items are worked on first
- prevents overloading the system, especially when work in progress (WIP) per person is limited

Pattern 9.5: Limit Work in Progress

Limit the number of work items in any stage of your work process.

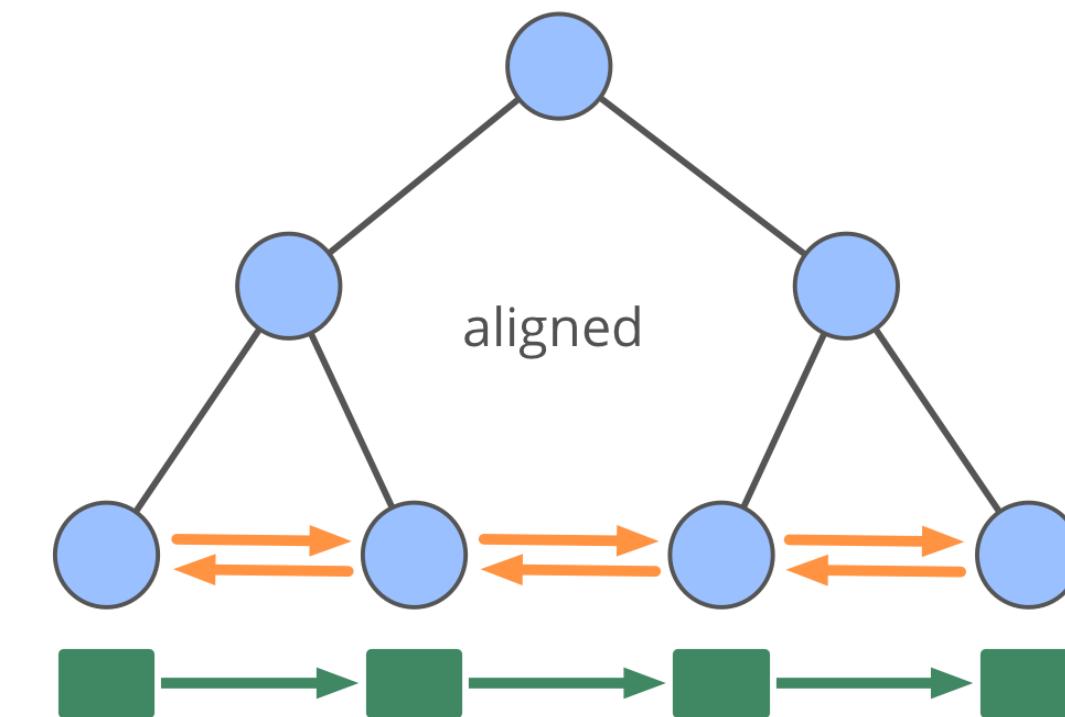
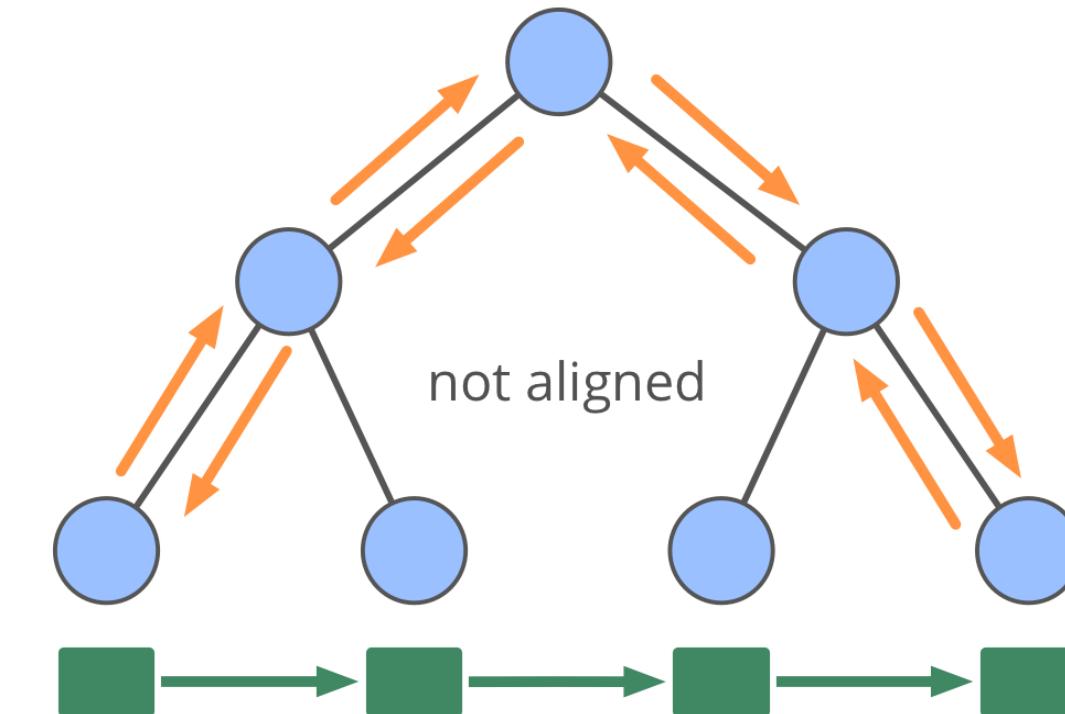
Work in Progress includes:

- number of items in a backlog
- concurrent projects or tasks for teams or individuals
- products in a portfolio

When an action would exceed an agreed upon limit of work items in progress, this needs to be brought up with the group before continuing.

Pattern 9.6: Align Flow

- in an effective organization, **flow of information and influence supports the continuous flow of value**
- alignment is achieved and maintained through the continuous improvement of agreements



→ flow of value
→ flow of information

Flow of Value

- flow of value is guided by (explicit and implicit) agreements and assumptions
- work in progress is regarded as waste because it ties up resources
- continuous flow of value reduces the potential for accumulation of waste
 - it also makes for shorter feedback loops and amplifies learning

Pattern 9.7: Coordinator (Role)

A person in the role of a coordinator is accountable for **coordinating a group's operations** and is **selected for a limited term**.

- the coordinator may be selected by the group itself, or by a superset circle
- the coordinator role is an optional pattern for coordinating work within a domain
- coordinators may collaborate to synchronize work across multiple domains



Organizational Structure

Organizational structure is the actual arrangement of domains and their connections. It reflects where power to influence is located, and the channels through which information and influence flow.

An effective organizational structure:

- supports flow of value
- enables collaboration
- ensures information is available to those who need it
- distributes power to influence as required
- evolves continuously to adapt to changing context

Organizational Structure (cont.)

The basic building blocks for organizational structure are interdependent, connected domains.

Domains can be linked in a hierarchy or a **heterarchy** (a.k.a. complex adaptive system, or network), where different functional structures co-exist.

Structural Patterns

Sociocracy 3.0 describes a variety of patterns to grow organizational structure.

- patterns apply to different layers of abstraction
- different structural patterns serve different drivers
- structural patterns can be adapted and combined as needed
- more patterns are out there and will be discovered

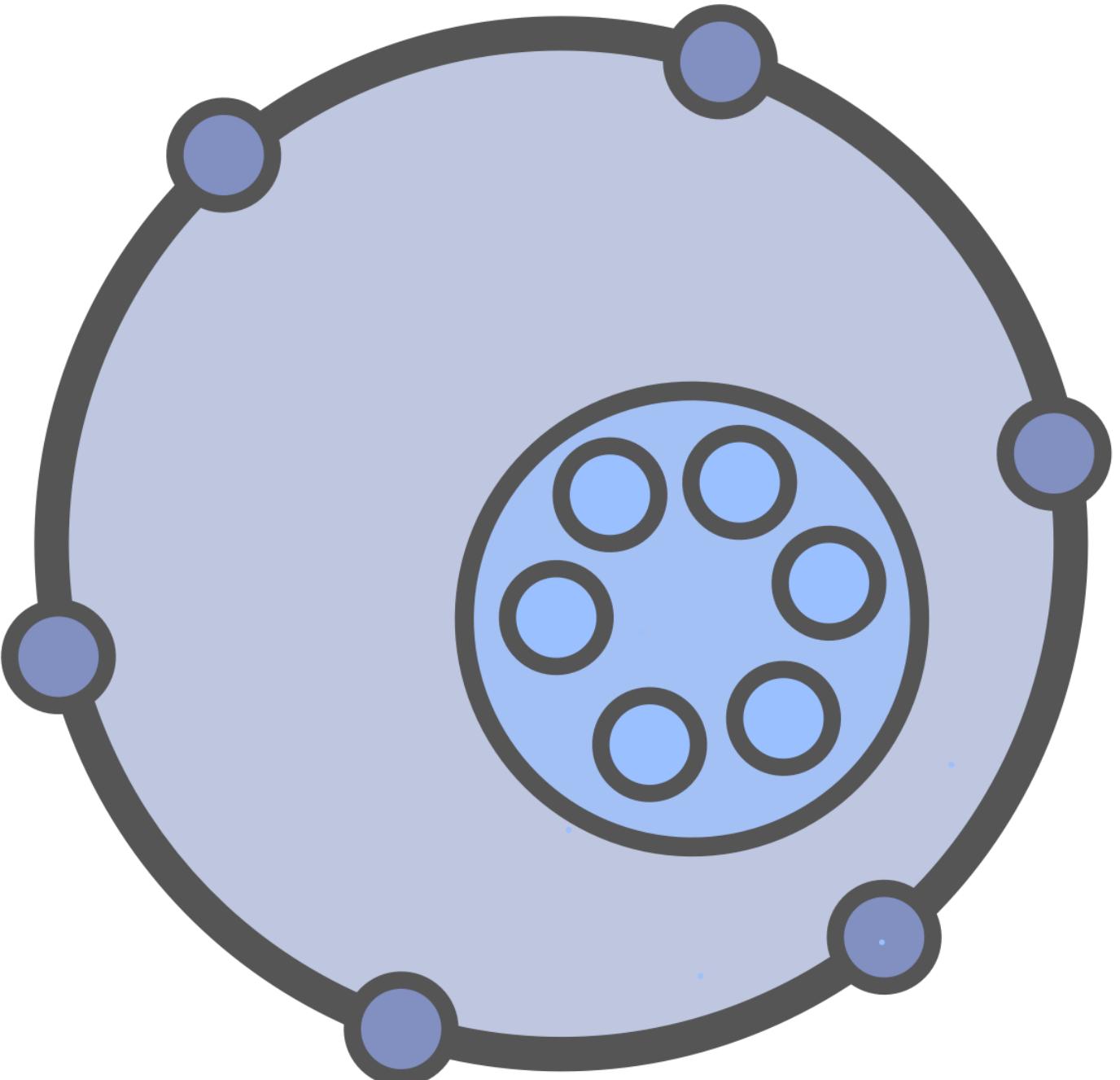
Pattern 10.1: Helping Team

A group of people with the mandate to execute on requirements defined by a circle in response to a driver.

- a way for a circle to expand its capacity
- may be self-organizing or guided by a coordinator chosen by the parent circle
- is governed by the parent circle

Members of the helping circle:

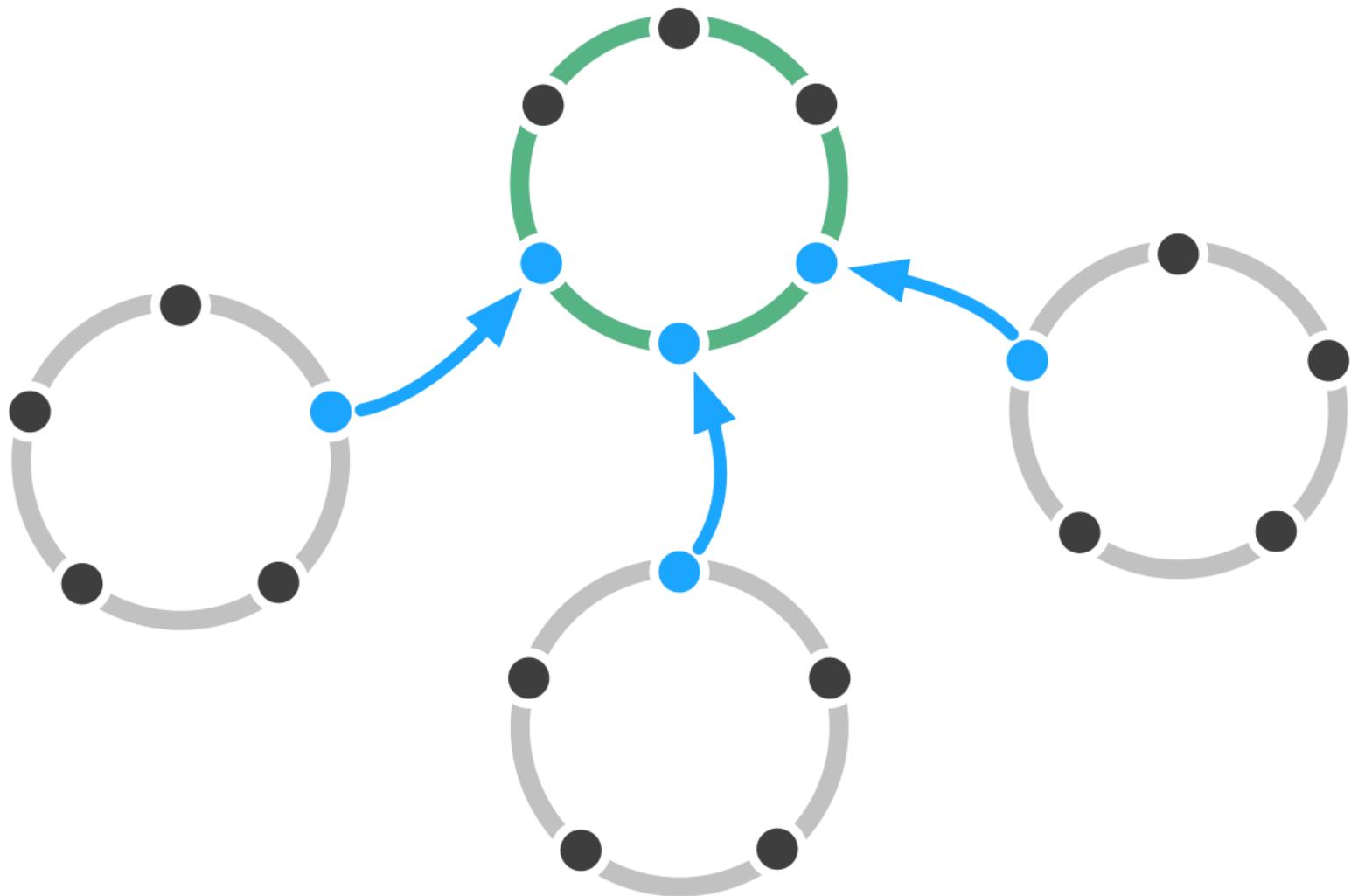
- can object to decisions made by the parent circle that affect them
- can add items to the governance backlog of the parent circle
- may be invited to select a representative to participate in governance decisions of the parent circle



Pattern 10.2: Service Circle

A pattern for outsourcing services required by two or more domains.

A service circle can be populated by members of the domains it serves, and/or by other people too.



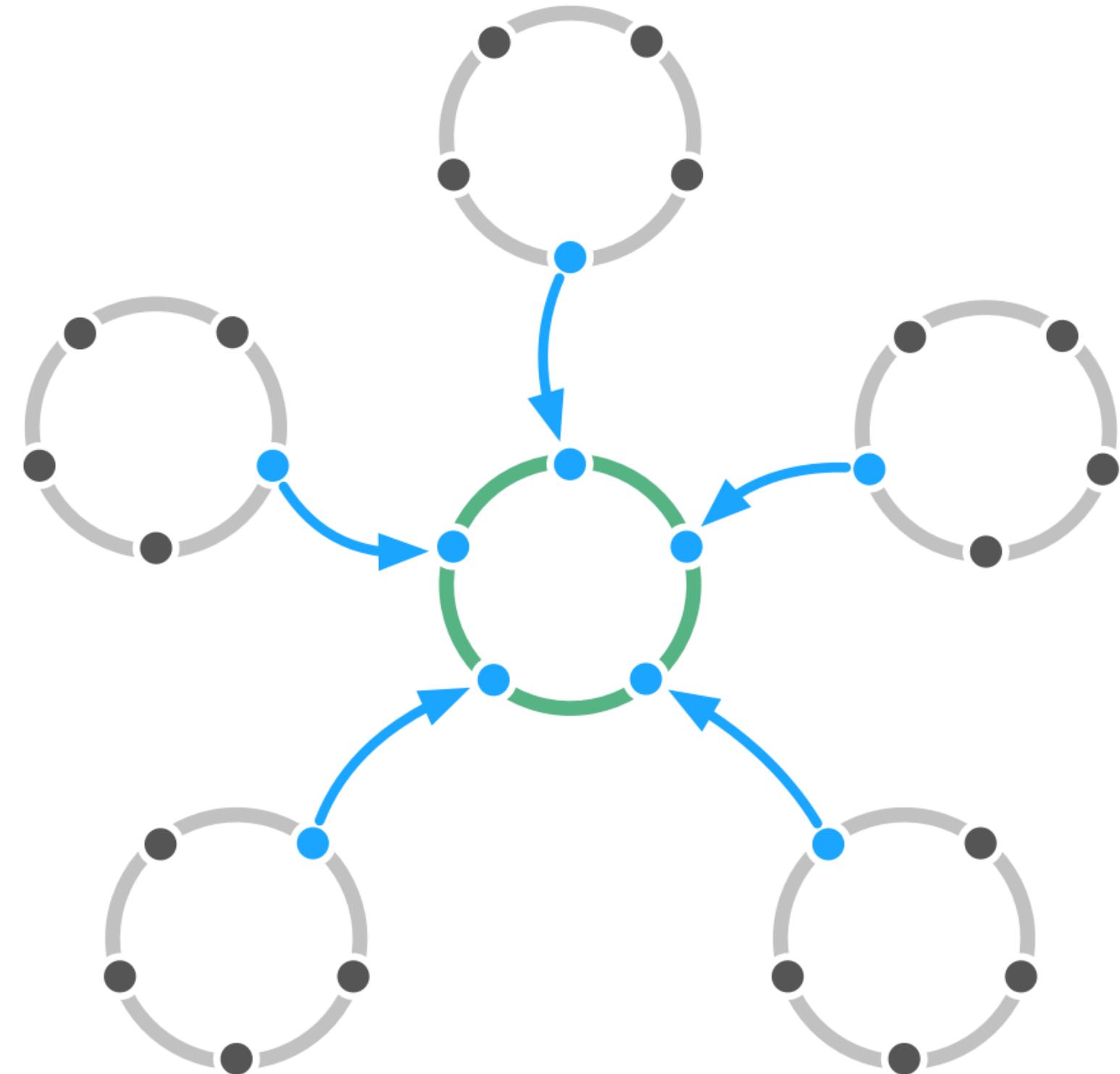
Pattern 10.3: Delegate Circle

A pattern for deciding how to address drivers affecting multiple domains.

Decisions of a delegate circle are acted upon in the various domains it serves.

Each circle selects one or more members as representative(s) to a delegate circle.

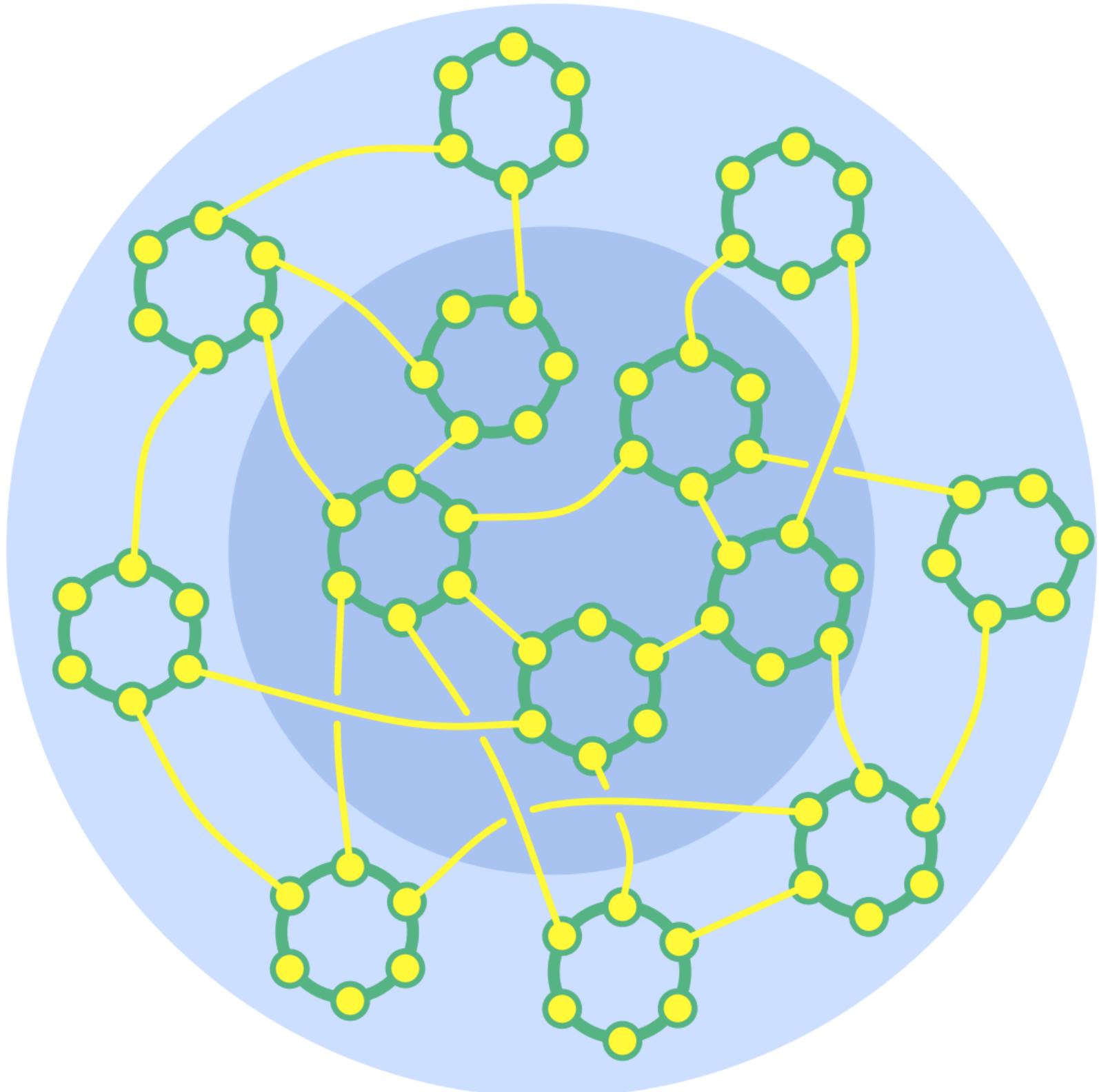
Delegate circles provide a way of steering organizations from the ground up, and bring a diversity of perspective to governance decisions.



Pattern 10.4: Peach Organization

A pattern for decentralized organizations to deliver value in complex and competitive environments.

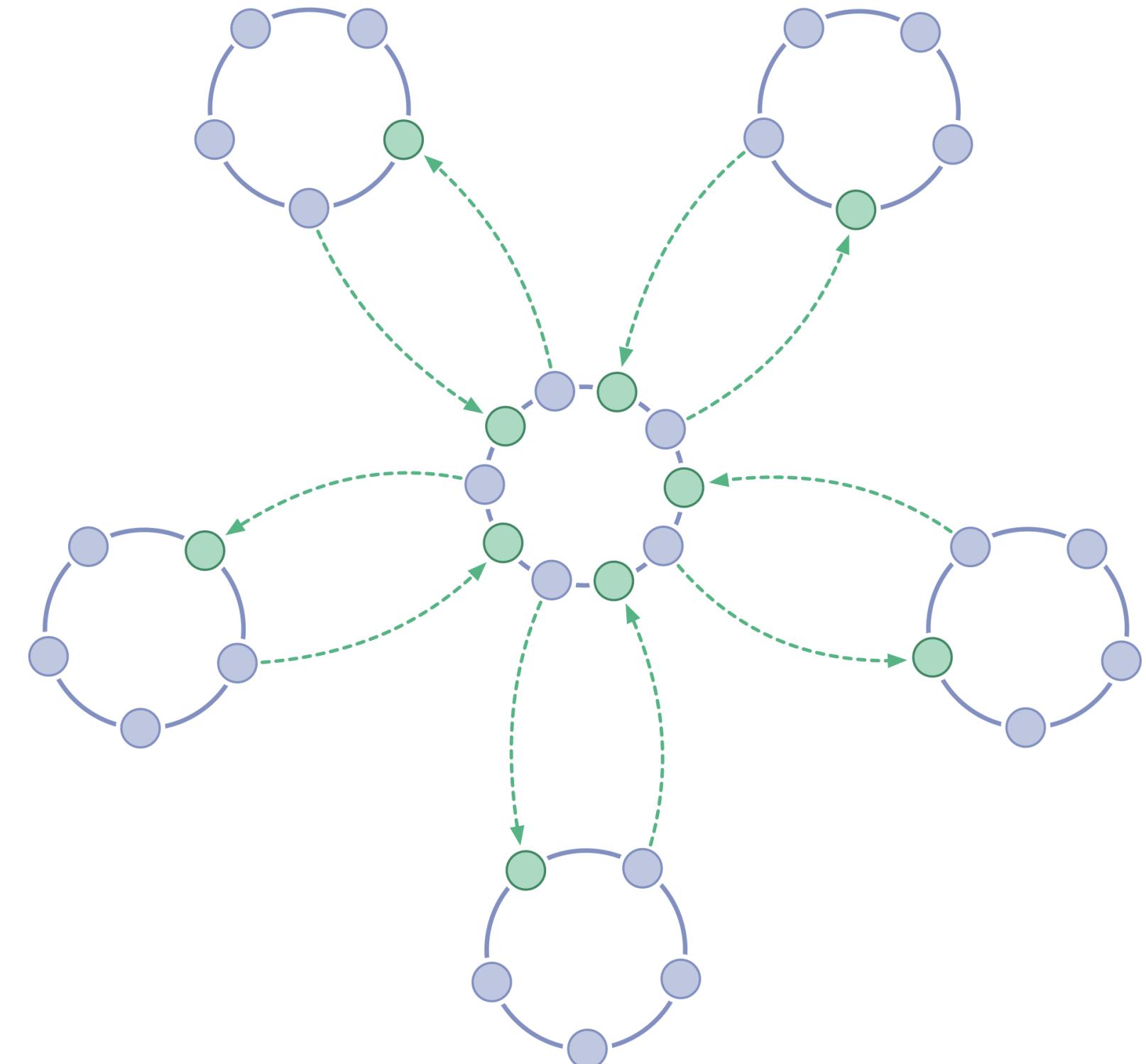
- circles on the periphery deliver value in direct exchange with the outside world (customers, partners, communities, municipalities etc.)
- the center provides internal services to support the organization
- periphery stewards the monetary resources and steers the organization



Pattern 10.5: Double-Linked Hierarchy

Bring equivalence to governance in a typical organizational hierarchy.

- the organization is built from of self-governing circles
- circles select a member to represent their interests in governance decisions of the next higher circle, and vice versa
- functional hierarchy is still possible if valuable



Pattern 10.6: Open Systems

An organization (or its various sub-domains) can benefit from intentionally communicating with and learning from others.

An organization is an interdependent system that benefits from consciously inviting **information and influence** from people who can assist with making decisions and experimenting to learn.

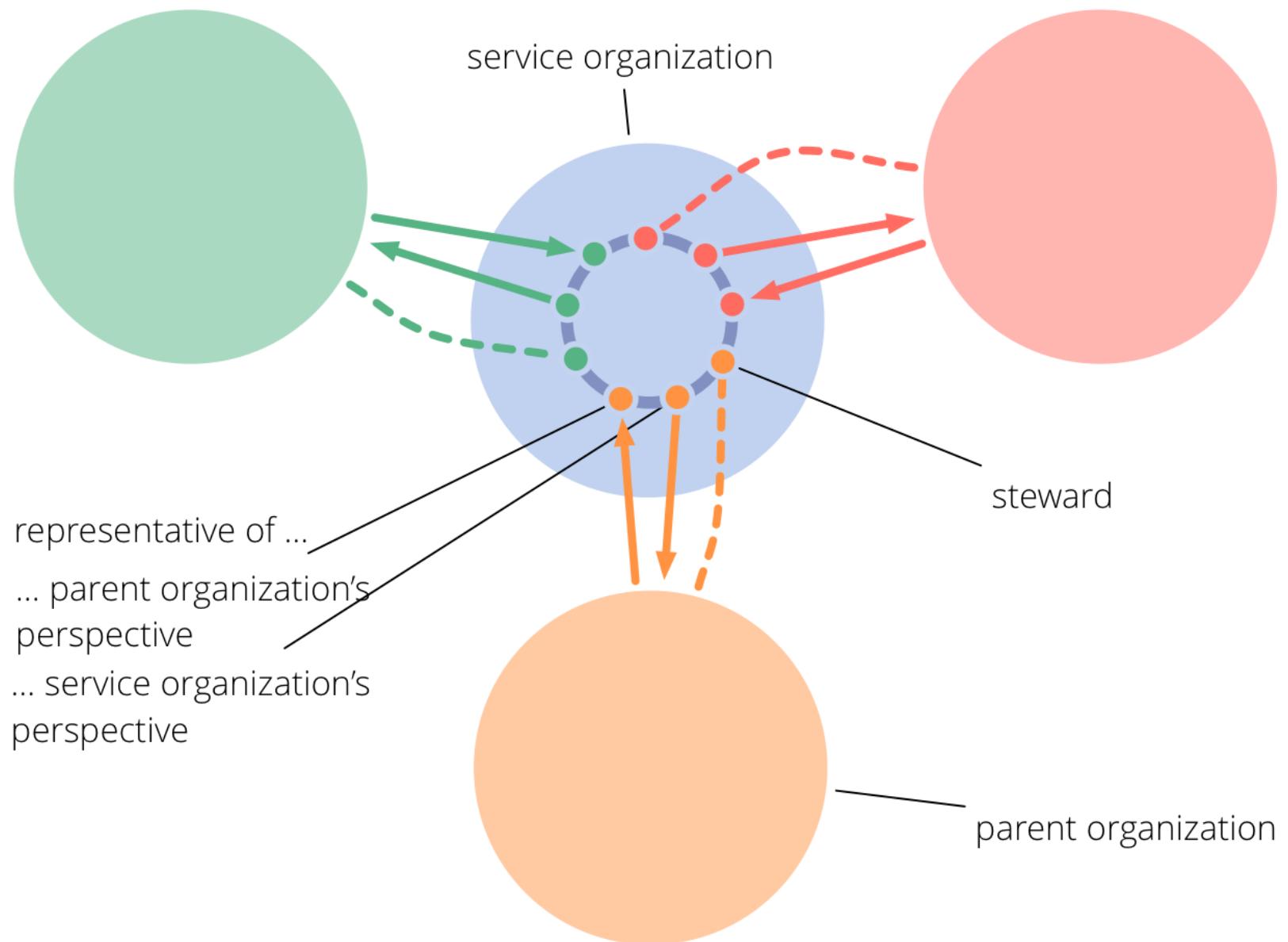
Open Systems (cont.)

- **External experts** can offer an outside perspective and bring knowledge, understanding and skills
- **Representatives of affected parties** can inform and influence decision making in ways that benefit overall objectives (see Those Affected Decide)

Pattern 10.7: Service Organization

A pattern for multi-stakeholder collaboration and alignment towards a shared driver (often referred to as a backbone organization).

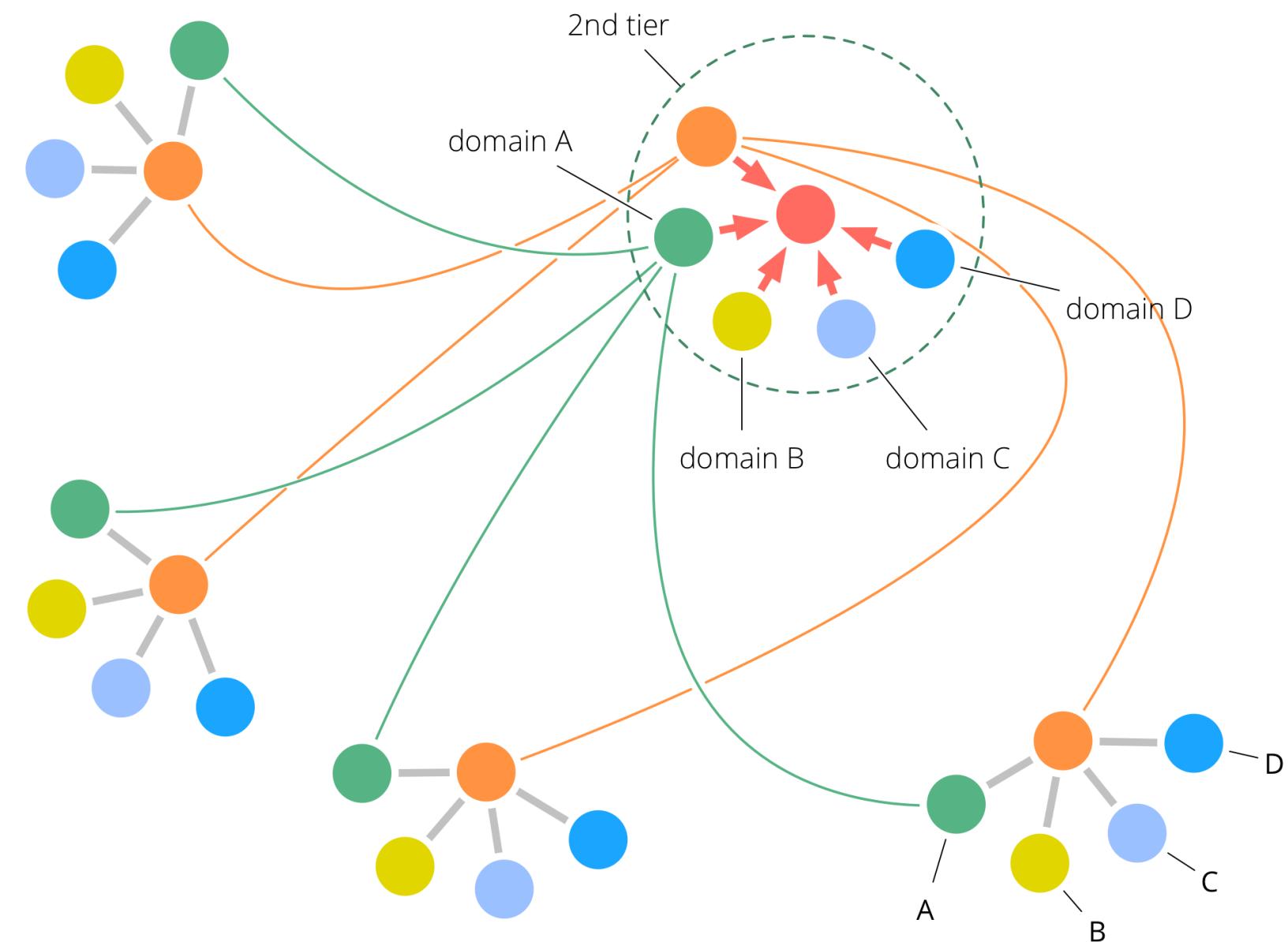
- improves potential for equivalence between various entities
- increases cross-departmental/organizational alignment
- supports multi-agency collaboration between departments/organizations with different primary motives, or that are in conflict
- suitable for one-off projects, or ongoing collaboration



Pattern 10.8: Fractal Organization

A pattern for multiple organizations (or domains) with a common driver to share learning and if valuable, coordinate and align action.

- a way to organize, align and steer from the ground up, while preserving autonomy and agency of the various entities involved
- a structure to facilitate innovation and exchange of learning throughout a large community on an 'as needed' basis



Pattern 10.9: Open Domain

An open domain is a way to intentionally account for a domain by invitation rather than assignment.

The delegator of the open domain clarifies:

- primary driver, key responsibilities and constraints of the open domain
- who is invited to contribute to the open domain
- constraints relating to the delegator's participation in the open domain's governance

The delegator of the open domain is accountable for ensuring regular review of the open domain.

Depending on the constraints set by delegators, contributors may account for work and/or governance of the open domain.

Appendix

- Changelog
- Links
- License
- Authors
- Glossary
- Pattern Index

Changelog (2017-10-21)

- added Liliana David to authors
- dropped the term "framework" (replaced with "practical guide")
- updated order of patterns
- added an index of all the patterns
- added a glossary
- added acknowledgements
- various small clarifications and corrections to text and illustrations

Changelog (2017-10-21 cont.)

- Introduction:
 - added "what's in it for me?"
 - added definitions for governance, self-organization, semi-autonomy, operations to introduction
 - clarified domains and their relationship to drivers
 - fleshed out core concepts
 - made all principles actionable

Changelog (2017-10-21 cont.)

- *Artful Participation*: refined description
- *Agreement*: clarified that the concept of agreements is applicable to people in roles
- *Clarify Domains*: refined description
- *Circle*: updated definition, refined description
- *Driver*: updated definition
- *Development Plan*: refined template and description
- *Develop Strategy*: clarified definition of strategy, refined description
- *Double-Linked Hierarchy*: new illustration

Changelog (2017-10-21 cont.)

- *Evaluate Agreements*: aligned questions to peer review
- *Governance Backlog*: updated definition
- *Logbook*: added details about governance to personal logbook
- *Objections*: clarified qualifying objections
- *Peer Review*: refined description
- *Respond to Organizational Driver*: integrated information about qualifying drivers
- *Role*: clarified role keeper may maintain a governance backlog, introduced the term "role keeper" for a person in a role
- *Proposal Forming*: added criteria for selecting tuners, added step for prioritizing considerations, small clarifications
- *Resolve Objections*: updated illustration to better reflect the process

Changelog (2017-10-21 cont.)

Renamed Patterns:

- *Backbone Organization* to *Service Organization*
- *Effectiveness Review* to *Peer Review*
- *Strategy* to *Develop Strategy*
- *Domain Description* to *Clarify Domains*
- *Describing Deliverables* to *Describe Deliverables*

added

Describe Drivers
Open Domain
Delegate Influence

removed

Coordination Circle
Nested Domains
Qualify Driver



Links

S3 website: <http://sociocracy30.org>

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

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The latest version of this document is available at
<http://sociocracy30.org>

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Glossary

Accountability: Respond when something is needed, do what you agreed to and take ownership for the course of the organization.

Agreement: An agreed upon guideline, process or protocol designed to guide the flow of value.

Circle: An equivalent, semi-autonomous and self-governing group of people collaborating to respond to a driver.

Concern: An opinion that doing something might impede – or miss an opportunity to improve – flow of value to an organizational driver.

Consent: Do things in the absence of reasons not to.

Continuous Improvement: Change incrementally to accommodate steady empirical learning.

Deliverable: Something which is provided as a result of an agreement in response to a driver. Deliverables include products, raw materials, services, experiences and transformation.

Doing the Work (Operations): People doing what needs to be done, guided by coordination and governance.

Domain: A distinct area of influence, activity and decision making within an organization.

Driver: A driver is a person's or a group's motive for responding to a specific situation.

Effectiveness: Devote time only to what brings you closer towards achieving your objectives.

Empiricism: Test all assumptions through experiments, continuous revision and falsification.

Equivalence: Involve people in making and evolving decisions that affect them.

Governance: Continuously deciding what to do to achieve objectives, and setting constraints on how and when things will be done.

Logbook: A (digital) system to store all information relevant for running an organization and its teams.

Objection: A reason why doing something stands in the way of (more) effective response to a driver.

Peer Domain: Two peer domains are contained within the same immediate superdomain, and may be overlapping.

Organization: a group of people collaborating towards a shared objective (driver).

Glossary (cont.)

Peer Drivers: Two *drivers* existing as a direct consequence of a response to the same *superdriver*, are called peer drivers.

Pattern: A template for successfully navigating a specific context.

Primary Driver: The driver that defines a *domain* is called the primary driver of that domain, except in the case of the organization itself, in which case it is referred to as the **organization's primary driver**.

Principle: A guideline for behavior.

Role: A set of constraints for how an individual can account for a *domain*.

Self-Governance: People governing themselves within the constraints of a domain.

Self-Organization: People coordinating work within constraints defined through *governance*.

Semi-Autonomy: People with autonomy to create *value*, limited by the constraints of their *domain*.

Strategy: A high level approach how people will create value to successfully account for a *domain*.

Subdomain: A domain that is fully nested within another domain.

Subdriver: A subdriver arises as a consequence of people responding to another driver (the *superdriver*) and are necessary to address to respond to the superdriver.

Super driver: see *subdriver*.

Superdomain: A *domain* that fully contains another domain.

Transparency: Make all information accessible to everyone in an organization, unless there is a reason for confidentiality.

Value: The importance, worth or usefulness of something in relation to a *driver*.

Waste: Anything not necessary for - or standing in the way of - effective response of a *driver*.

Patterns

Adapt Patterns To Context - 5.1
Adopt The Seven Principles - 3.2
Agree On Values - 3.3
Agreement - 6.1
Align Flow - 9.6
Artful Participation - 3.1
Ask For Help - 2.1
Backlog - 9.1
Be The Change - 5.3
Breaking Agreements - 3.5
Bylaws - 3.9
Circle - 4.2
Clarify Domains - 6.3
Consent Decision Making - 1.4
Continuous Improvement Of Work Process - 5.6
Contracting And Accountability - 3.6
Coordination Meeting - 7.5
Coordinator - 9.7
Create A Pull-System For Organizational Change - 5.2
Daily Standup - 7.3

Patterns (cont.)

Delegate Circle - 10.3
Delegate Influence - 4.1
Describe Deliverables - 6.5
Describe Drivers - 1.3
Develop Strategy - 6.2
Development Plan - 2.4
Double Linking - 4.5
Double-Linked Hierarchy - 10.5
Driver Mapping - 1.11
Evaluate Agreements - 1.7
Evaluate Meetings - 8.3
Evaluation Criteria - 6.6
Facilitate Meetings - 8.2
Fractal Organization - 10.8
Governance Backlog - 8.5
Governance Facilitator - 3.4
Governance Meeting - 7.1
Helping Team - 10.1
Intended Outcome - 6.4
Invite Change - 5.4



Patterns (cont.)

Limit Work In Progress - 9.5
Linking - 4.4
Logbook - 6.7
Logbook Keeper - 6.8
Meeting Host - 8.4
Navigate Via Tension - 1.2
Objection - 1.5
Open Domain - 10.9
Open S3 Adoption - 5.5
Open Systems - 10.6
Peach Organization - 10.4
Peer Feedback - 2.2
Peer Review - 2.3
Planning And Review Meetings - 7.4
Prioritize Backlogs - 9.2
Proposal Forming - 1.9
Pull-System For Work - 9.4
Representative - 4.6
Resolve Objections - 1.6
Respond To Organizational Drivers - 1.1

Patterns (cont.)

Retrospective - 7.2
Role - 4.3
Role Selection - 1.10
Rounds - 8.1
Service Circle - 10.2
Service Organization - 10.7
Support Role - 3.8
Those Affected Decide - 1.8
Transparent Salary - 3.7
Visualize Work - 9.3

