

PURPOSE TO ACTION FRAMEWORK

A NEW WAY TO WORK THAT WORKS

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WORKSHOP

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INTRODUCTION

Jonathan's History

Born in Madison

Moved to San Francisco

4 Years @ HolacracyOne

Software Developer → Coach

Certified Holacracy Coach

Consultant/Advisor

Jonathan's Background

Montessori / Waldorf

NLP, NVC, AR

Computer Programming

Creative + Spiritual + Technical

Cooking, Cycling, Kettlebells

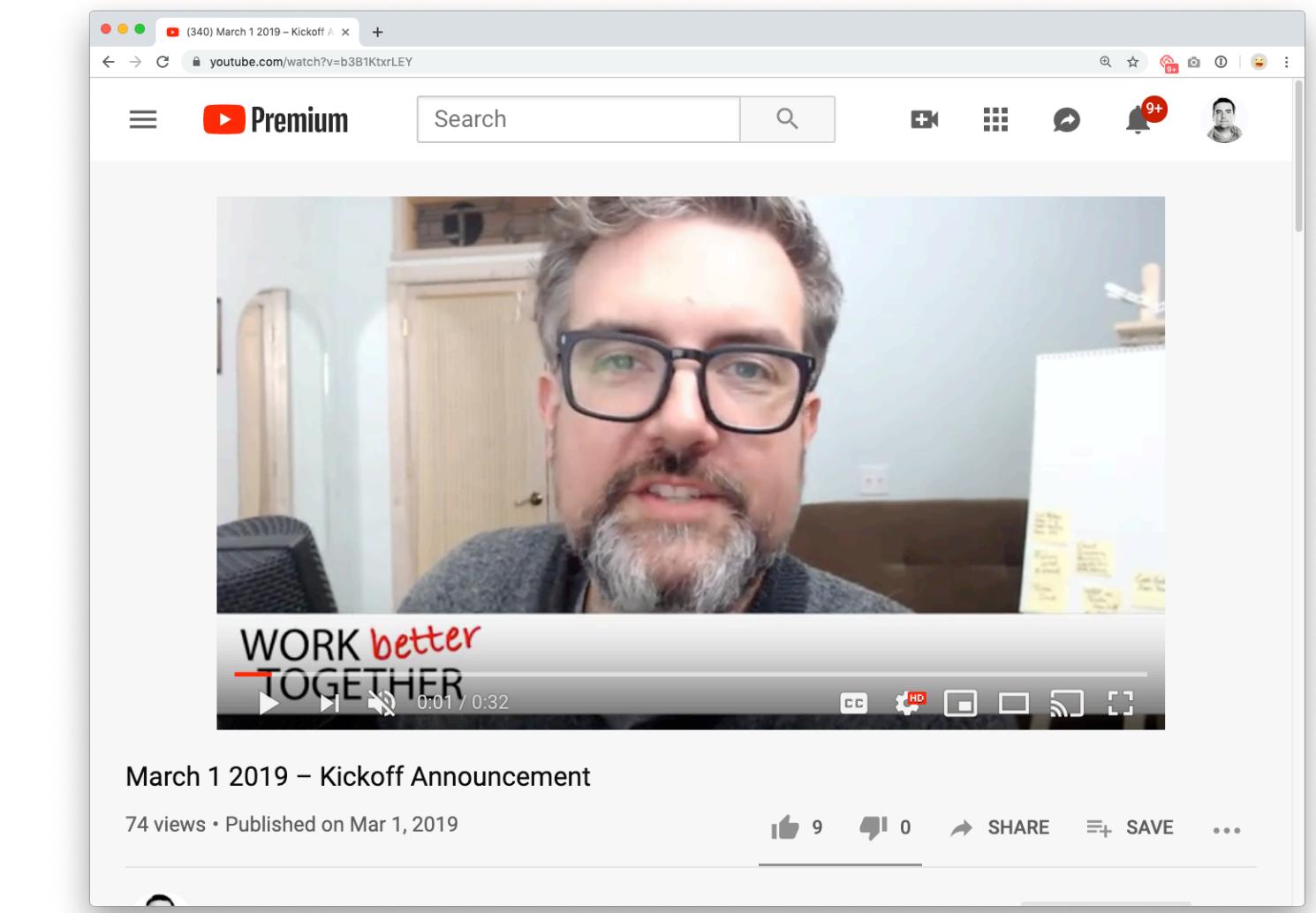
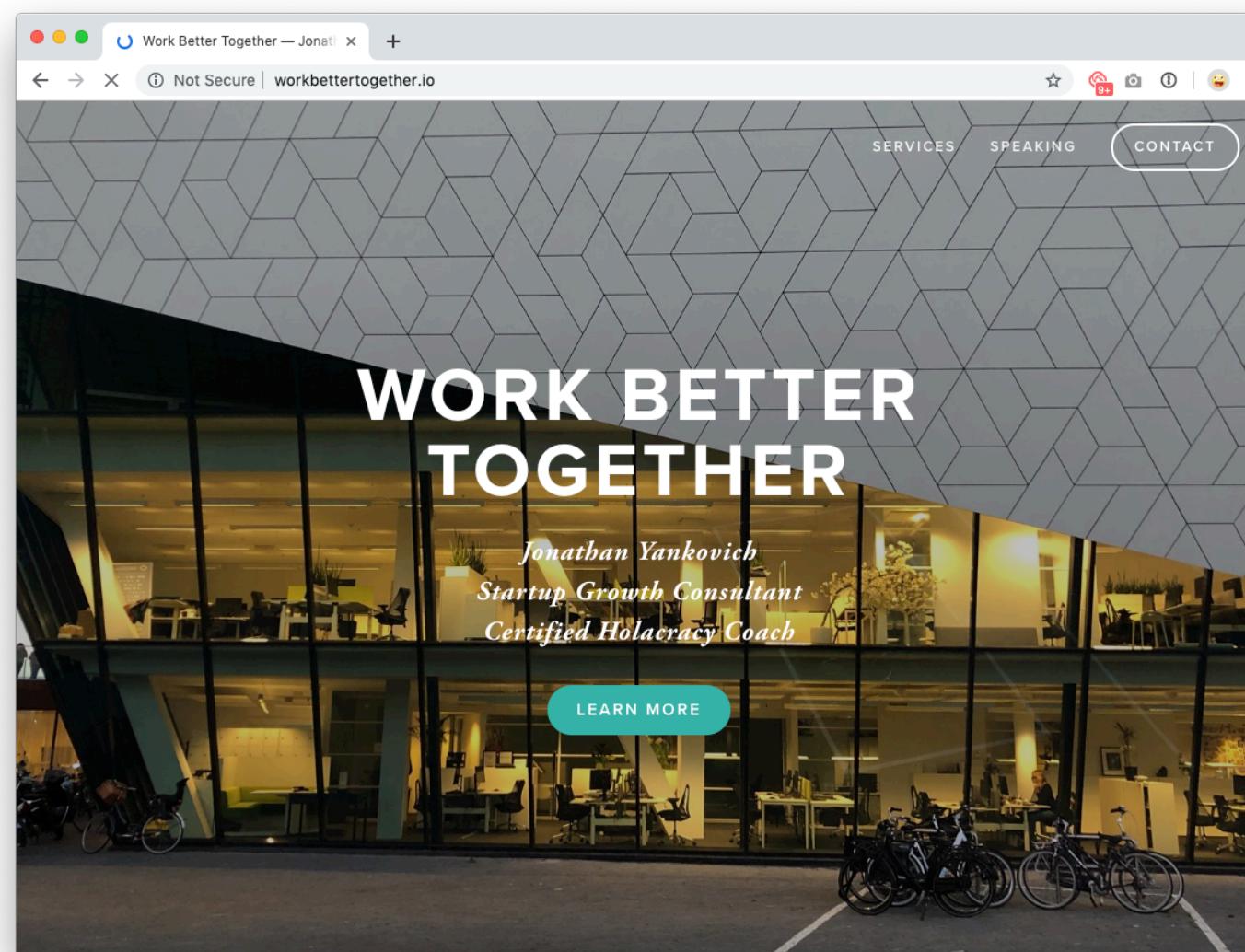
Jonathan's Purpose

Help people work better together

Effective Institute's Purpose

Demystify self management and make getting things done easier

Jonathan's Projects



Consulting
effective.institute

Products
teal.dog

Education
Work Better Together
YouTube, Workshops

Jonathan's Projects

30

Consulting
effective.institute

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Products
teal.dog

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Education
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YouTube, Workshops

Purpose of our time together

Learn about the cutting edge of management & teamwork

Orient to a new way to think about the structure of work

Leave with a new possibility to change how you work

Provide pathways for growth & learning

OUR ORGANIZATIONS ARE STUCK

87% of employees are “not engaged” or “actively disengaged”

70% of change management efforts fail

<https://news.gallup.com/poll/165269/worldwide-employees-engaged-work.aspx>

<https://www.linkedin.com/pulse/leading-change-why-70-transformation-programs-fail-d-suryawanshi/>

OUR ORGANIZATIONS ARE STUCK

Managers don't have all the information they need,
and can't cope with the complexity they face

People can't resolve their issues themselves

The organization can't adapt to its changing environment

OUR ORGANIZATIONS ARE STUCK

3 Options

Continue the status quo

Create superhuman leaders

Take the work of management,
break it down, distribute it across the org

OUR ORGANIZATIONS ARE STUCK

Many traditional organizations have **startup envy**

“Think like a startup”

P2AF tells us...

- ◆ How to move in the same direction
- ◆ How to know what needs to be done
- ◆ How to know who should do what
- ◆ How to get the work done
- ◆ How to remove obstacles to along the way

Does this sound like “Management?”

Organizational Alignment

Breaking down the work

Removing obstacles

What was it like at your first yoga class?

Found it awkward and uncomfortable

Heard words you didn't understand

Got corrected for every little detail

Thought those people were weird

Maybe you wanted to leave



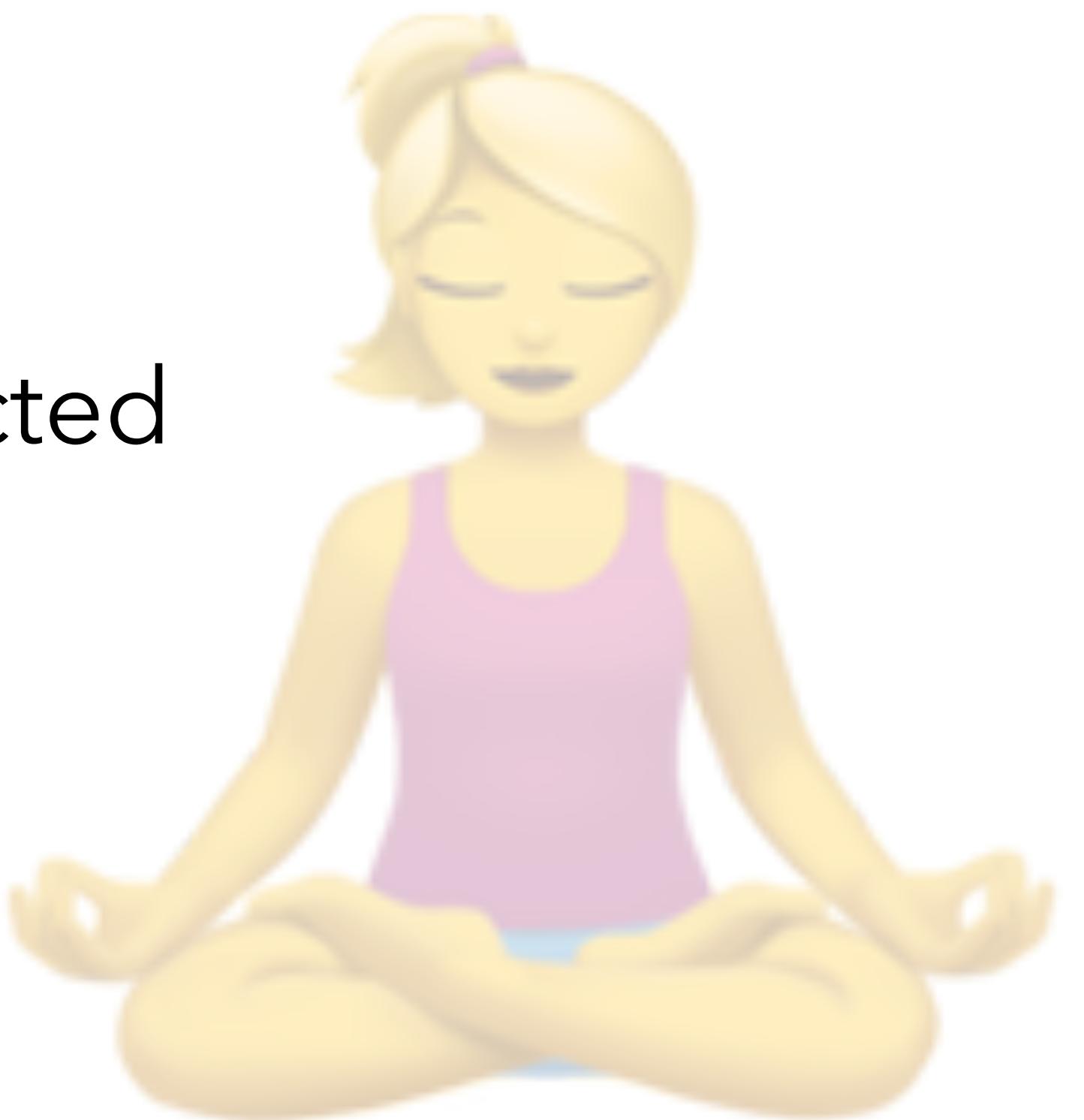
But as you started to learn...

The positions started to feel good, even natural

The language became second nature

You learned what to expect, what was expected

You started to see the value



And once you went a few times...

You realized there was so much more to learn.

And so began your practice.



Purpose-To-Action Framework is a **practice**.

Over time,

Skills deepen, you become graceful

Reasons for things make intuitive sense

You make it your own

...but you're never "done"



Other useful metaphors for learning

Visiting a foreign country

You need a map at first, and the language is confusing

Learning to dance

What starts horribly awkward becomes effortless and graceful

Learning to play soccer

Children learn by playing, not by reading the rule book



Benefits

- ✓ Clarity
- ✓ Responsiveness
- ✓ Leadership Capacity
- ✓ Speed of decision making

Clarity means...

Knowing exactly what is expected of you, and what you can expect

Knowing who is doing what

Knowing who can make which decisions

Knowing what the most important thing to work on is

Knowing why you're doing what you're doing

Your next action on any project is clear

Responsiveness means...

The organization can respond to a changing world ("Agility")

You can answer questions quickly and confidently

You can get answers quickly and confidently

Leadership Capacity means...

Leaders are freed to spend time on strategic decision making instead of managing day-to-day minutia (*micro-managing*)

People working on projects aren't slowed down by "helpful leaders"
(*Capacity to lead yourself*)

Speed of decision making means...

The time between when a person asks a question and when they have an answer that satisfies them is reduced.

By over 90%.

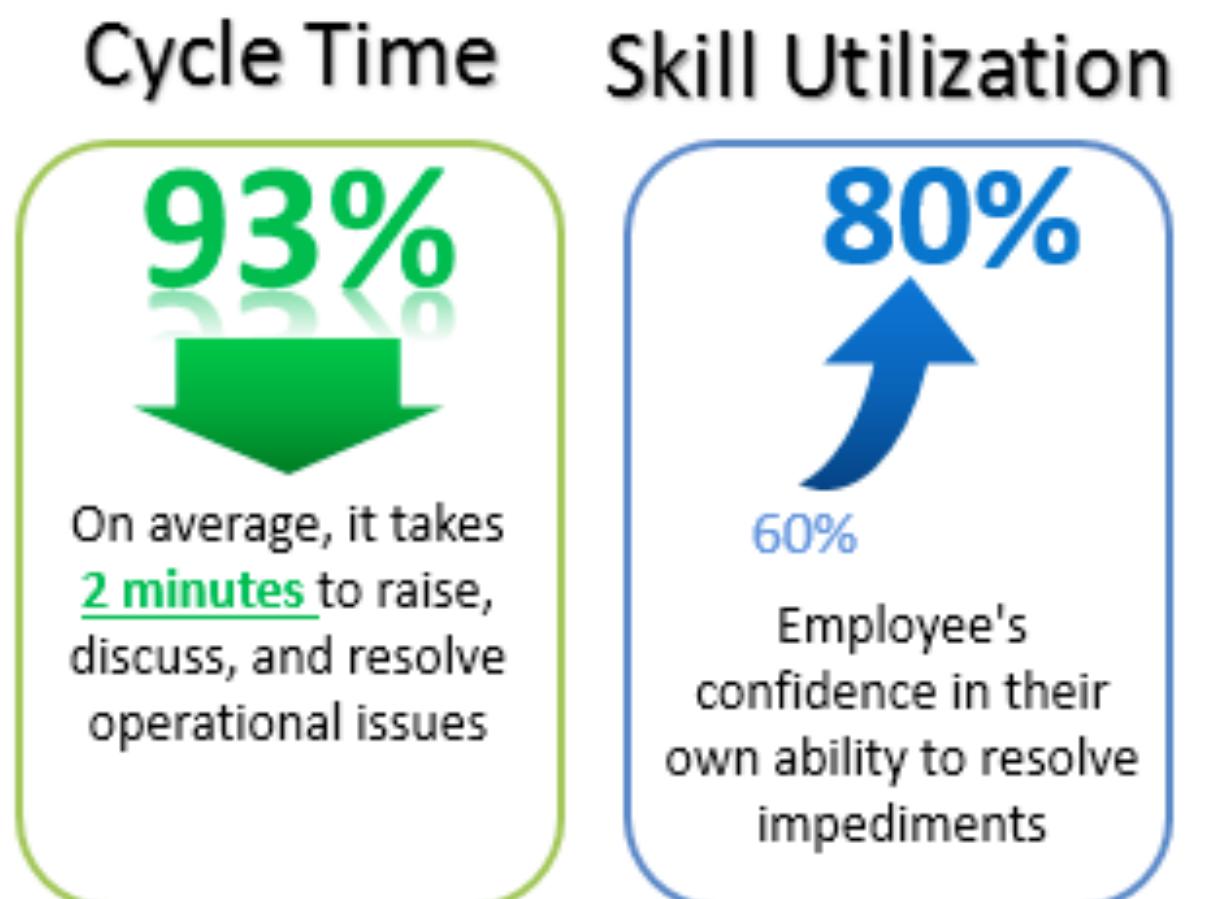
Case Study: Washington Dept. of Technology (WATECH)



<https://ocio.wa.gov/news/heck-kaizen-kaikaku-your-hierarchy>

Case Study: Washington Dept. of Technology (WATECH)

"We averaged about 1-2 operational decisions per meeting. Now, with nearly a year of Holacracy we consistently make 20-25 operational decisions per meeting. The average time to introduce, discuss, and decide an operational issue is 2 minutes. This represents a 93% reduction in cycle time for decisions, while many other decisions are never even brought to meetings because they no longer need management approval for execution."



- Michael DeAngelo, Former Director at Wa-Tech

<https://ocio.wa.gov/news/heck-kaizen-kaikaku-your-hierarchy>

Case Study: Washington Dept. of Technology (WATECH)

“What was taking up so much of my time as a servant leader was solving other people’s problems”

- Michael DeAngelo, Former Director at Wa-Tech

BACKGROUND

First evidence of self management ~1950

"Empirical evidence of self-managing teams can be traced to the 1950s when British scientist Eric Trist reported on self-regulating coal miners in his now famous article, 'Some Social and Psychological Consequences of the Longwall Method of Coal Getting.'"

- *Eric Trist*

<https://corporate-rebels.com/reinventing-the-wheel/>

Origin of Holacracy, 2007

"[Most methods are created] by someone taking a set of ideas and constructing a system around them."

"I began to realize that rules and methods stemming from my ideas and principles were actually getting in the way of my ultimate search for a better way to organize."

"The process was more like discovering and capturing than designing"

Brian Robertson, Founder of Holacracy



Brian Robertson

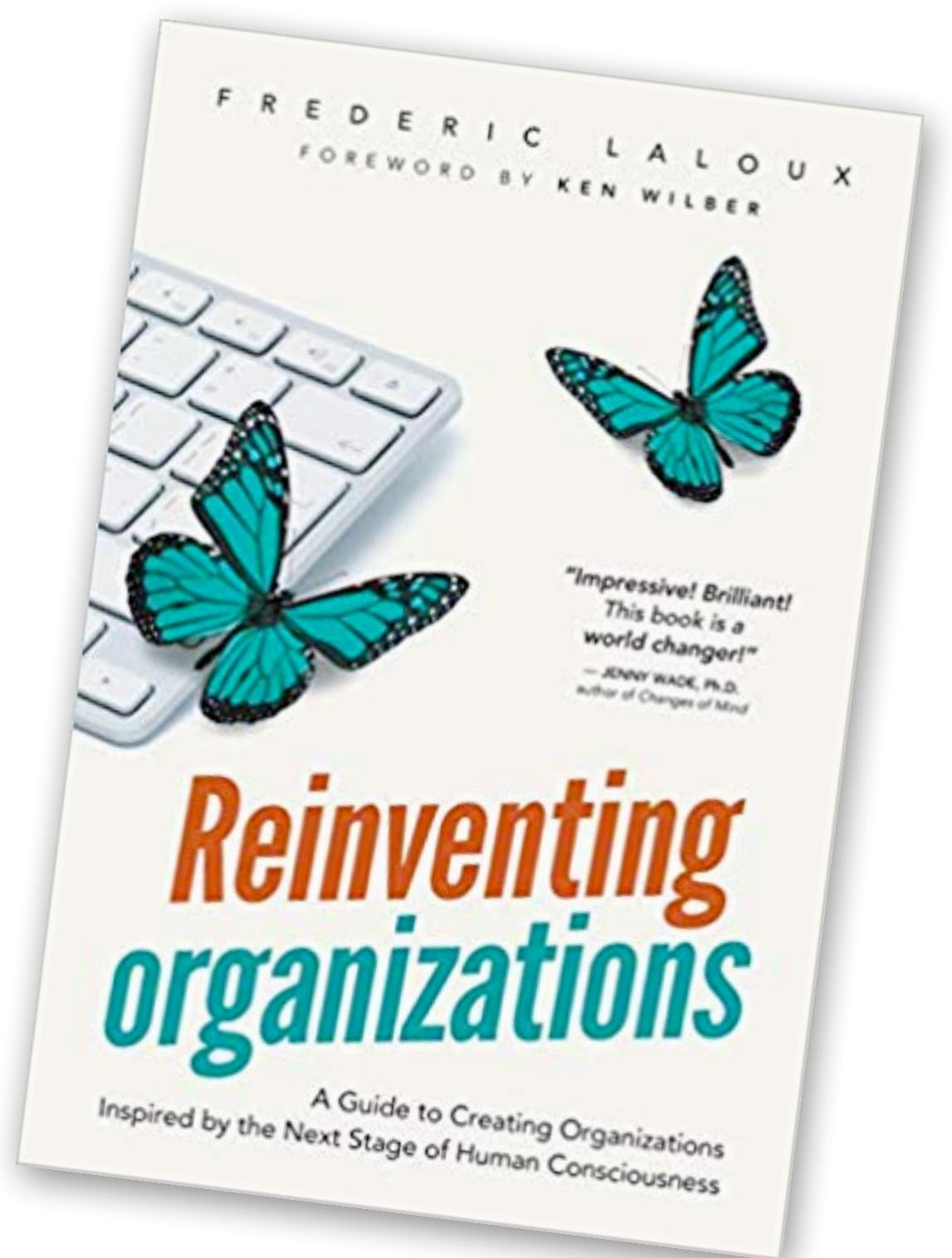
<https://blog.holacracy.org/history-of-holacracy-c7a8489f8eca>

Self Management picks up speed, 2014

Fredric Laloux , Reinventing Organizations, 2014

Defines a developmental model for organizations

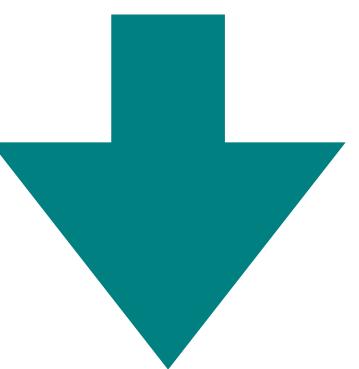
Considered “State of the art” in
Organizational Development



WHAT IS SELF-MANAGEMENT?

BACKGROUND

Five Stages of Organizational Development



Red "Impulsive"	Amber "Conformist"	Orange "Achievement"	Green "Pluralistic"	Teal "Evolutionary"
Mafia Street gangs	Army Catholic church	Wall Street banks Most MBA programs	Southwest Airlines Nonprofits and NGOs	Patagonia HolacracyOne
Division of labor, top-down authority	Replicable processes, a stable organization chart	Innovation, accountability, meritocracy	Empowerment, values-driven culture, stakeholder value	Self-management, wholeness, evolutionary purpose
Organization exists to serve power holders.	Organized according to a group common belief. Shame and guilt used for enforcement.	Organization as Machine. Mechanistic, predictable, scientifically understood and controlled.	Has a sense of inclusion, and a drive to view and treat all people as equal.	Organization as Organism. World is integrated, people are called by an inner voice to contribute based on their unique potential.
Authority enforced by through physical power.				

Reinventing Organizations, LaLoux, (2014)

What do we mean by “Teal Organizations”?

Self-management

Wholeness

Evolutionary Purpose

“Organization as Organism”

“Individuals contributing based on choice”

There are many paths to self-management

Sociocracy

Holacracy

Buurtzorg Model

Market-based Dynamics

& more...

Self-management is everywhere

Buurtzorg Nederland

Healthcare

Morningstar Farms

Foods

VSE Inc

Technical Consulting

WATECH

Government

WD-40

Manufacturing

Zappos

Retail

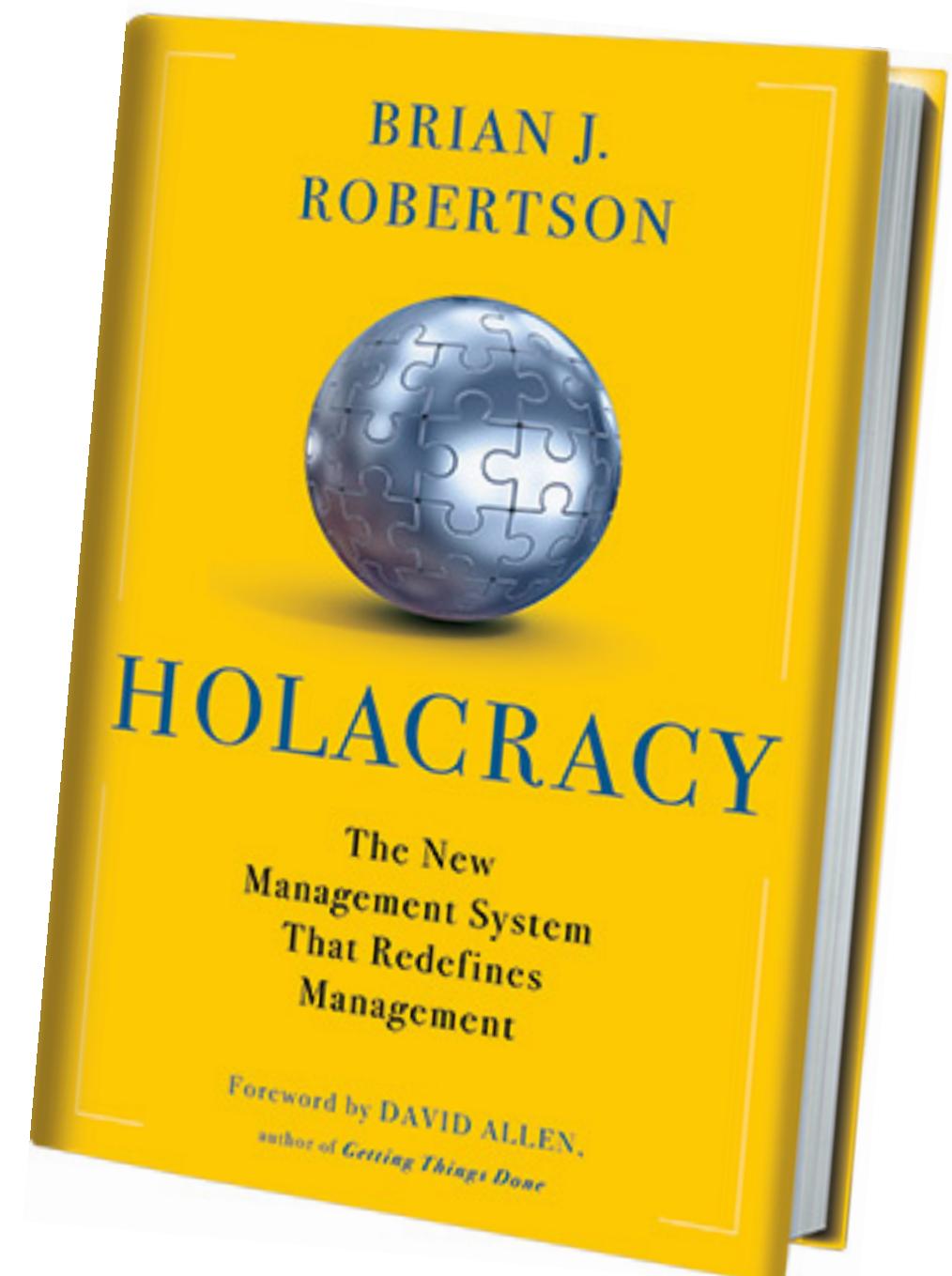
Buurtzorg Nederland is “[A nurse-led model of holistic care that revolutionized community care in the Netherlands ... employs over 10,000 nurses and assistants in 850 self-managed teams supported by 15 coaches and 45 staff. (8% as opposed to 25% in comparable orgs).]”

<https://www.buurtzorg.com/about-us/our-organisation/>

What is Holacracy?

Holacracy is a methodology for structuring, growing, and governing an organization. Holacracy is described in the Holacracy Constitution.

Holacracy distributes authority and decision-making throughout an organization, and defines people not by hierarchy and titles, but by roles. Holacracy creates organizations that are fast, agile, and that succeed by pursuing their purpose.



Holacracy is a registered trademark of HolacracyOne, LLC

<http://holacracybook.com/>

Hola-what?

holon (Greek: ὅλον, *holos* "whole")

Something that is simultaneously a whole and a part.

-ocracy (/ɒkrəsi suffix, in nouns)

Government according to a particular principle

The word “Holon” was first used in Arthur Koestler's book

The Ghost in the Machine (1967, p. 48)

[https://en.wikipedia.org/wiki/Holon_\(philosophy\)](https://en.wikipedia.org/wiki/Holon_(philosophy))

Fractal (Self-similarity)

Each part has properties of the whole,
and is also looks different from the whole
Simple, consistent rules combine to create complex
systems

Examples in nature - Order without rulers

Human Body Cell, Organ, Limb, Body

City Person, Household, Neighborhood, Town, City

The Internet?

**ABOUT
PURPOSE TO ACTION**

WHAT IS PURPOSE-TO-ACTION FRAMEWORK?

ABOUT P2AF

What it is not

Culture Change

Conceptual

Values system

Democratic

Flat Organization

A Software Solution

"Agile for X"

What is Purpose-To-Action Framework?

P2AF is a set of individual and group practices that optimizes for clarity, efficiency, and ease. It is a fork (modification) of the Holacracy business management methodology.

WHAT IS PURPOSE-TO-ACTION FRAMEWORK?

ABOUT P2AF

Said differently, it is...

A set of Practices, Rules, Rituals (Processes)

Provides structure while respecting autonomy

Can be adopted one piece at a time

Emphasize usability over completeness

Why fork Holacracy?

Holacracy is a complete, comprehensive system that changes how power works in organizations. The bar for adopting Holacracy is high. It is often said to be a 5+ year journey.

The goal if P2AF is to provide 80% of the benefits of Holacracy in 20% of the time and effort.

Some things

Anything you learn about Holacracy can be applied to P2AF.

It won't solve your problems, but it will show you where they are, and it will give you the tools to fix them.

It takes what you're already doing and standardizes it with the rigor of a world-class team.

KEY SHIFTS

Role and Soul

"Trees are to a forest as _____ are to an organization"

We all work and play in many roles every day.

How we relate to each other changes depending what role we're in.

Organizations govern roles, not people. People give life to the roles.

By changing the roles distinct from the people, the organization can express its purpose more fully.

Implicit → Explicit

In most organizations, responsibilities are vague and implied.

Changes to roles, strategies, and responsibilities go unrecorded.

How are you expected to own your autonomy when you're dependent on someone to even know what decisions you can make, or how to get the help you need?

This leads to ambiguity, inefficiency, and dysfunction.

Healthy organizations make as much information as explicit as possible by putting it in a place where everyone can see it.

Centralized Authority → Distributed Authority

As any complex system develops, it differentiates.

Each part gains more control over how it functions in service of the whole.

Consciously *diffusing authority* in an organization creates more capability and allows the organization to adapt more readily. Distributing authority through clear, explicit expectations supports healthy growth and autonomy.

Concentrations of power represent threats to the long term healthy of these systems.

Avoiding Tensions → Processing Tensions

Anything you notice in your world that could be better is a Tension.

Everyone is bubbling with tensions all the time.

In an unhealthy organizations, important tensions go ignored.

When you process a tension, you grow and adapt, the tension disappears. **Tensions are at the root of healthy change.**

Healthy people and orgs have reliable ways to process tensions.

Being Purpose-Driven

Purpose allows a group to orient toward a goal without explicit orders.

Evaluating actions against purpose is an effective way to make decisions toward a common goal without being told what to do or how to do it.

Purpose is superior to values because it can't be used to exclude and alienate people.

For any action, ask yourself, "Does this serve my role's purpose?"

WORKING “ON” THE ORGANIZATION (IN VS ON)

KEY SHIFTS

Work “on” the organization, not just “in” it.

Most people work in their orgs without working on them.

Working “on” the organization is about changing the structure of circles and roles to refine what we can expect of each other.

Changing the structure is how organizations learn.

If you don’t do this work, you are robbing the organization of learning.

The process is the teacher

Pobody's nerfect. Nobody starts out knowing everything.

You will never be as bad at this as you are today.

It's okay, even healthy, to make honest mistakes during meetings.

Since the process is designed for improvement, following the process (in meetings and daily practice) will result in learning and improvement.

Get on the field, try things. If you don't have the answer, just do your best.

IN PRACTICE

Setting the scene

You're part of a navy seal team and you've just gotten orders to drop into a foreign country to perform an operation.

Everyone is working according to a set of duties so everyone knows they can count on each other. Some people have special duties and authority that help the team work smoothly. Other people have special skills that only they can do, that are needed for the team to complete its mission.

Setting the scene

We're on the plane about an hour away from the drop site.

We have one hour to make sure everyone has what they need to accomplish their part of the mission.

The huddle before we drop behind enemy lines is the Tactical Meeting.

In a *Tactical Meeting*, *Circle Members* bring *Agenda Items* to address *Tensions* they feel while working in their *Roles* towards the circle's *Purpose*. *Checklist Items*, *Metrics*, and *Projects* are reviewed.

To address *Tensions*, people request information, share information, request projects or actions, and ask the Circle Lead to update the roles. The result of the meeting is new *Projects*, *Actions*, *Changes to Roles*, and new *Tensions*.

Outside of tactical meetings, people perform their roles' accountabilities and work on projects by prioritizing and taking actions. Anything that happens in a tactical meeting can be done outside of a tactical meeting.

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Tactical Meeting

A tactical meeting is a regular meeting of a circle, usually 1x/week. The purpose is to...

...ensure alignment with the goals and purpose of the team.

...surface information relevant the work of the circle and its roles.

...remove barriers to anyone's work with the full support of the team behind them.

...highlight how the circle can change to address changes in environment.

In a *Tactical Meeting*, **Circle Members** bring *Agenda Items* to address *Tensions* they feel while working in their *Roles* towards the circle's *Purpose*. *Checklist Items*, *Metrics*, and *Projects* are reviewed.

Circle A circle is a team with a stated purpose and a number of roles that work toward that purpose. A circle is also a role, and like a role has accountabilities to the circle that it is a part of.

Circle Member Every person filling a role in a circle is a circle member. All circle members are invited to every tactical meeting. Only circle members may participate, but anyone may observe.

In a *Tactical Meeting*, Circle Members bring **Agenda Items** to address Tensions they feel while working in their Roles towards the circle's Purpose. Checklist Items, Metrics, and Projects are reviewed.

Agenda Items

The agenda is created on-the-fly (no pre-set agenda.) Each circle member adds as many items as they want from a private list that they maintain. New items can be added to the agenda at any time. Most items represent a tension coming from a role. The same item can be added by different people and will be processed separately. The same person may bring the same item more than once. The Facilitator chooses which item to process and each item is done when the agenda item holder gets what they need.

In a *Tactical Meeting*, Circle Members bring *Agenda Items* to address **Tensions** they feel while working in their *Roles* towards the circle's *Purpose*. *Checklist Items*, *Metrics*, and *Projects* are reviewed.

Tensions

A Tension is any sense a person has that something could be changed or improved. Often tensions represent what a role needs to work toward an outcome. Tensions brought to a meeting must serve the Circle's purpose, otherwise the Facilitator can throw out the agenda item it represents. Each circle member is responsible for maintaining their own list of tensions. Tensions are fuel for change. Tensions are valuable.

In a *Tactical Meeting*, Circle Members bring *Agenda Items* to address *Tensions* they feel while working in their **Roles** towards the circle's *Purpose*. *Checklist Items*, *Metrics*, and *Projects* are reviewed.

Roles

Roles represent the job functions in a circle. Each circle has 3 “core roles” (*Circle Lead*, *Facilitator*, *Secretary*) and any number of “dynamic roles.” Roles are created and maintained by the Circle Lead. The Circle Lead “fills” (assigns) people into roles. Each person may fill more than one Role. A role can exist without being filled and can be filled by more than one person. Each Role can have a purpose and one or more accountabilities. Roles can also have projects, domains, and policies. Roles are often created or changed to solve a tension from another role.

In a *Tactical Meeting*, *Circle Members* bring *Agenda Items* to address *Tensions* they feel while working in their *Roles* towards the circle's *Purpose*. *Checklist Items*, *Metrics*, and *Projects* are reviewed.

Purpose

Each Role and Circle can have a Purpose. A purpose clarifies the identity and intention of the role, even absent any other information. It helps people in the circle or role orient their work. Purposes are often aspirational. A purpose cannot compel specific action. A good purpose leaves room for interpretation. When doing work on behalf of a Role, the role filler should ask, "Does this work serve the purpose of my role or the purpose of the circle?"

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Checklist Items

A checklist item is type of metric, stated as a question or statement that has a yes/no answer. Each checklist item in a circle belongs to at least one role and may also be assigned to "all circle members". When answering a checklist item, the role filler can answer "Check", "No Check", or "No data." The rules for adding and removing checklist items are the same as for metrics.

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Metrics

A Metric describes quantifiable value, typically a number, that represent something relevant to the work of the Circle. Each Metric in a circle belongs to at least one role and may also be assigned to "all circle members". When answering a Metric, the role filler can provide the answer, typically a number, or say "No data." Any circle member may add or remove metrics on any other role if it serves their roles. The Circle Lead has the authority and responsibility to maintain useful metrics on the Circle, overriding circle members.

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Projects

A Project is a concrete outcome, typically described in past-tense. A project can be thought of as a series of *actions* that a person takes on behalf of a role. Projects can only belong to one role, but many roles can have a project with the same name. During Project Updates, each Role will give share only what's changed with each of their projects since the last update was given, or say "No Updates."

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Actions

An action is a concrete step toward an outcome. These are the things we do every day, like “schedule haircut” or “check the mail”. For any project, identify the next action you would take to move toward the outcome.

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Requesting information

Ask for information, opinions, data, or advice to help you get clarity.

Avoid seeking buy-in, agreement or consensus. If concerned, ask,

"Does anyone see harm in _____?" or

"In my role as _____, I intend to _____. Are there any objections?"

To address *Tensions*, people request information, **share information**, request projects or actions, and ask the Circle Lead to update the roles. The result of the meeting is new *Projects*, *Actions*, *Changes to Roles*, and new *Tensions*.

Sharing information

Announce or share anything you think another role or the circle needs to know.

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Requesting projects or actions

Ask another role to work towards an outcome or take a specific action.

The person being asked needs to consider if the project/action fits their roles' purpose and accountabilities, and may accept or decline, but may not decline because of resources (time, money, energy, etc).

ex: "Would it make sense in your role as _____ to take a project to _____?"

To address *Tensions*, people request information, share information, request projects or actions, and ask the Circle Lead to update the roles. The result of the meeting is new *Projects*, *Actions*, *Changes to Roles*, and new *Tensions*.

Ask the Circle Lead to update the roles

This is how you create an ongoing expectation of another role.

This is also called a “Governance Change”.

The Circle Lead may ask the role filler if the change makes sense, but does not need their permission to update the role. For example,

“I’d like to add an accountability to the office manager role to order printer paper.”

Summary of the four pathways

Share your tension, then

- Request Information
- Share Information
- Request a project or action
- Ask the Circle Lead to update the roles

You may use as any pathway as many times as you want during your item.

In-Process, Out-of-process, & Time Outs

If you are confused about the process, you can ask the Facilitator for a time out.

The facilitator will call time out, and you can get clarity about how to use the pathways.

When done, the facilitator will call "time back in" and resume the process.

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Outside of tactical meetings

Each person must keep list of projects & the next actions and review it regularly.

When working, you must consider all of your projects and prioritize accordingly, choosing the next action on the project that you think will best serve the organization.

When asked to take a project, if it fits your roles, you must accept it, regardless of workload.

When asked about a project on your list, you must be able to provide:

- The relative priority of the project
- The next action of the project.
- A projection of when it might be done

You can take any action in service of your roles as long as it doesn't violate an existing rule.

Taking healthy action

Do what you think will best serve your roles and accountabilities.

Update your roles to match the reality of your work.

Don't ask for permission, seek consensus, or get agreement.

Don't be afraid to create tensions for others.

Be a Ferrari.

ANATOMY OF AN ORGANIZATION

Organization

Circles

A circle is a role that contains other roles.

Roles

A role describes expectations around an area of work.

Agreements

Any written agreement between two entities.
(Person to Person, Person to Org, Org to Org, etc)

People

People perform work in roles on behalf of the organization.

Circle

Roles

Roles are different depending on the needs of a circle.

Core Roles

All circles have certain “core roles” which perform required functions for the health of the circle.

Every circle is a Role, and so has everything a role has.

Strategies

Heuristics (loosely-defined rules set by the Circle Lead that serve to inform decisions made by roles in the circle.

Role

Purpose

The reason for the existence of the role (aspirational)

Accountabilities

Concrete ongoing processes the role can be expected to do

Focus

For multi filled roles, a focus orients the work the role filler does

Domains

“Property” of the role that you must get permission to impact

Policies

A constraint or rule you must follow when acting on a domain

Roles are like cells

Different roles perform different specific ongoing processes

They exist in service of the broader organism

They have a boundary that mediates what gets in and out

ANATOMY OF AN ORGANIZATION

DISTINCTIONS

Core Roles

Some roles are special and are needed for the circle to function.

Circle Lead

Represents the circle externally
Sets priorities & strategies
Allocates resources
Updates roles at the request of other roles

Facilitator

Maintains order in meetings
Answers questions about procedure

Secretary

Schedules meetings
Records outputs of meetings
Interprets governance when needed

Dynamic Roles

All other roles are *dynamic* and created by the *Circle Lead* as part of the circles *Governance*.

Grant Writer

Finance

Software Developer

Project Manager

Customer Service

Catering

Website Manager

Copywriter

The shape of a healthy Circle

Have 2-20 dynamic roles

Have 3-8 people filling those roles

Hold regular Tactical Meetings once/week

The Circle Lead updates the roles at least once a month (often more)

*** The Circle Lead is not the Facilitator**

In new circles, the Governor and Circle Lead are often filled by the same person

Traits of healthy Roles

Have an inspirational purpose that orients and motivates the role filler

Have at least one accountability, starting with an “-ing” word

Is reviewed once a week by each of its Role Fillers

When multi-filled, each role filler has a different focus

APPENDIX

Recommended technology platforms

Shared Live Document Editing

Google Docs, Office365, Notion

Easy video conferencing

Zoom

Group Communication platform

Slack, Asana, Teams, etc

Practice Management Tool

TealDog, GlassFrog, Asana, etc

Personal Organization System

Asana, Omnifocus, Things, 2Do
Wunderlist, Evernote, Apple Notes,
etc

OTHER TOPICS

APPENDIX

Optimal conditions for success

Working Agreements

How to write good roles

Criteria for filling people into roles

Evaluating Role Fit & Org fit

Removing accountabilities
from the Circle Lead

How to write strategies

Harm, Objections, & Integration

Requesting & Accepting Projects

Biasing for action in communication

Stating intention

Official Circle Lead Prioritization

How to prioritize your work

Aligning personal purpose
with your role constellation

Technology Platforms

Basic required skills

Full Time, Part Time & Contractors

Getting Things Done (GTD) practice

Projections vs Deadlines

Domains & Policies

Making autocratic decisions

Going slow to go fast

Pathways for getting someone
to do something

What to do when something lands
at your feet

WHEW

THANKS

HOLACRACYONE

TOPHER HUNT

BETH & HALEY

THANKS

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