

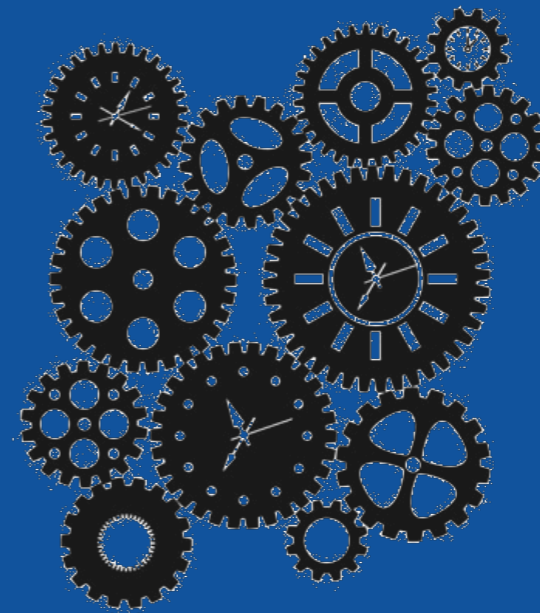


PatternDynamics™

thrive in complexity

Flocks not Clocks

Learning the Principles of Self-Organisation



The PatternDynamics™ Operating System Workbook

Using a living systems view to help you create more open, adaptive, innovative self-organising groups.

Contents

1.

Getting Started

- The Living Systems View
- Why Self-Organisation?
- 7 Principles of Self-Organisation

2.

Assessing Your Capability

- The Living Systems Context
- Determining Your Purpose
- Evaluating Your Current State
- Your Focus

3.

The Operating System

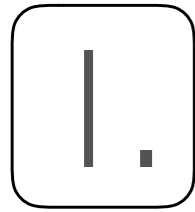
- Aspects of the Operating System
- Principles, Patterns, and Practices

4.

Collaborative Systems Enquiry

- Operating System on a Page
- Run the OS
- OS Performance Chart
- Next Steps





Getting Started

The Living Systems View

Living systems work like flocks of birds. They are *self-organising*: the coordination of the whole emerges, bottom-up, from the combined interactions of all members of the group. In a living systems model, individuals make autonomous decisions based on sharing a set of organising principles. In the case of a flock of birds, they are principles like know the goal, turn when your neighbour turns, maintain a certain distance to the birds nearby, and follow the bird in front of you. The parts that make up all living systems, from organisms to whole ecosystems, follow shared principles and self-organise in this way.

In contrast to the living systems model, many organisations are based on a mechanistic view. In mechanistic models, decision making comes from the *top down*. Individuals are expected to carry out decisions in a structured fashion, with little autonomy, like the cogs or springs in a clock. Research indicates that as social and organisational challenges become more complex, mechanistic operating models do not allow sufficient collective input for effective decision making and problem solving. ¹

Our goal in this workbook is to provide you with a model that helps you learn principles, practices, and skills for demonstrating the benefits of increased self-organisation based on a living system view. By demonstrating these benefits you can attract others to this form of organisational practice and help lead the change to more generative cultures.

1.) For example, see: Jaques, E. (1976). A general theory of bureaucracy. London: Heinemann Educational.; Habermas, J. (1975). Legitimation crisis (T. McCarthy, Trans.). Boston: Beacon Press. Kegan, R. (1994). In over our heads: The mental demands of modern life. Cambridge, MA: Harvard University Press. Bell, D. (1973). The coming of post-industrial society. New York: Basic Books



Why Self-Organisation?

“From a Living Systems Perspective there has never been anything more powerful in human affairs than people who are in touch with the self-organising Source of a living universe. “

– Tim Winton, Founder of PatternDynamics

Our theory of change is based on the view that self-organisation is the great under-recognised natural foundation to all forms of human endeavour. Communities, businesses, institutions, and societies do not actually function like machines, most of the real work of ‘organisation’ in groups is done day-to-day, moment-by-moment by living beings that understand how to work together towards their goals as living systems.

In fact, reconnecting with and strengthening the self-organising capacity of our groups is the key to solving the challenges we are currently facing. It’s living systems, not machines or technologies, that are the models we turn to for understanding how to manage complexity itself. Only living systems model the openness, adaptability, innovation, and distributed problem solving required for meeting the complexity inherent in our rapidly emerging, highly interconnected and interdependent planetary-scale society.

Our approach to self-organisation is that it is best thought of as a set of skills, based on the organising principles of living systems, that individuals can learn and practice to create healthier, more highly-functioning groups.

Employing these skills and demonstrating the benefits of strengthening self-organisation creates influence. Although this form of influence is often less tangible, longer term, more holistic—and therefore often less visible—it is tapping into the power of self-organisation, not top down structural control, that is ultimately the most powerful force for change.



7 Principles of Self-Organisation

You can get started very simply. Remember how birds use a set of principles to decide what to do next? You can do the same thing. Just use the 7 Principles of Self-Organisation below to reflect on your decision making as challenges arise. In the following sections of this Workbook, you will have the opportunity to learn about the principles in more depth and to build your skills by applying them as more detailed practices. For now, just imagine that, like a flock of birds, making adjustments based on these living systems principles will contribute to emergent solutions in your own life.

1) Feel Into Your Rhythms:	Do your important rhythms and routines feel right? Is there anything that could be more regular, or less?
2) Locate Important Perspectives:	Have you found all the important sources of information? Who do you need to speak with to locate relevant points of view?
3) Outline Organisational Structures:	Are key organisational structures represented as simple graphics? How could you create or update organisational diagrams?
4) Coordinate Diverse Perspectives:	How could you learn more by exchanging perspectives? What priorities may need to be adjusted?
5) Design Creative Solutions:	What are some ways you could connect previously unrelated ideas? What novel solutions look like the best ones to test? Why?
6) Reflect on Governance:	Are any current goals or milestones outdated? What agreements need to be updated to make them more relevant?
7) Sense Changes In Your Purpose:	Do you sense any changes to your deeper purpose? If so, what adjustments could be made in relation to the principles above?



2.

Assess Your Capability

You'd like to gain skills to help influence your organisation or community toward a more open, adaptive, innovative self-organising operating model. You understand that the world is becoming more complex, and that this is one of the most effective ways to meet the complexity challenge.

Before we move on to the the PatternDynamics™ Operating System (PD OS) itself, we'll start with some reflection on the nature of living systems. The questions in the section that follows will help you: 1) understand the living systems context, 2) evaluate your existing capability, and 3) determine your purpose.

The Living Systems Context

On the next page, we'll go through some reflective questions. As well as helping you understand more about a group or organisation you work with, this assessment will also help you get a sense of some of the important general characteristics of a living systems view. The characteristics we will focus on are: *adaptability, innovation, openness, self-organising capacity, and generativity*.

Don't worry if some of the terms or questions are unfamiliar to you. At PatternDynamics, we have developed a range of resources to help people improve their understanding of how living systems work. How well you understand them at this point will give you a sense of the strength of your existing level of 'systems thinking' ability.



Adaptability: How well does your organisation or community mimic a living system's capability for solving problems *at the level best suited to meet a particular challenge*? Contrast this with the habit of (and/or requirement for) deferring decisions to those higher up the chain of command.

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Innovation: Describe the degree to which your organisation or community is willing to experiment with creative solutions. Contrast this with the degree to which existing processes and structures are relied on to solve emergent challenges.

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Now choose a group or team that you work with directly. Assess the group's general performance in relation to the living systems traits below. Then, if you are able, sit down with a colleague and discuss their views on these topics.

- **Openness:** How open and inclusive is your group to dissenting, marginal, or outside voices?

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- **Self-organisation:** How well does this team spontaneously coordinate its activities?

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- **Generativity:** How often do people create self-reinforcing cycles that build healthier, more functional environments that in turn support the perpetuation of this cycle?

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How closely did your colleague's thoughts match your own? What did you learn about your group's, and your own, living systems capacity?



Determining Your Purpose

Why do you want to help your team, organisation, or community shift to a more self-organising operating model? What is your ultimate purpose in facilitating groups that coordinate themselves using living systems principles?

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Reflect for a moment on the impact you could have by adopting more elements of a living systems operating system. What things could you do regularly, even at a small scale, to demonstrate the benefits of more open, adaptive, and innovative processes? What opportunities become available when you help to manage challenges by communicating skilfully about the principles of a more self-organising approach?

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Evaluating Your Current State

Now we're going to have a look at how you think you currently perform in your group or organisation. Grade below, as best you can, quickly and intuitively, how you currently behave in relation to the 7 Principles. Be honest. Higher scores indicate better self-organisation skills. You can also use this as a '360' type assessment by asking your colleagues to assess your performances.

Principle	Description/Inquiry	Score (1–10)
Feel Rhythms:	How in touch are you with the important rhythms in your organisation and when they might need to be adjusted?	
Locate Perspectives:	How thoroughly do you identify relevant stakeholders <i>and</i> inquire of <i>them</i> their point of view?	
Outline Structures:	How clearly do you represent graphically the structure of roles, accountabilities, and authorities?	
Coordinate Perspectives:	How skilfully do you inquire in order to identify the principles that help prioritise diverse perspectives?	
Design Solutions:	How effective are you at making and explaining the creative connections that lead to better solutions?	
Reflect on Governance:	How committed are you to setting clear goals and milestones, recording clear agreements, and using these to monitor progress?	
Sense Purpose (Source):	How sensitive are you to emerging challenges <i>and</i> to how they may require shifts in your original purpose or source inspiration?	
Total		



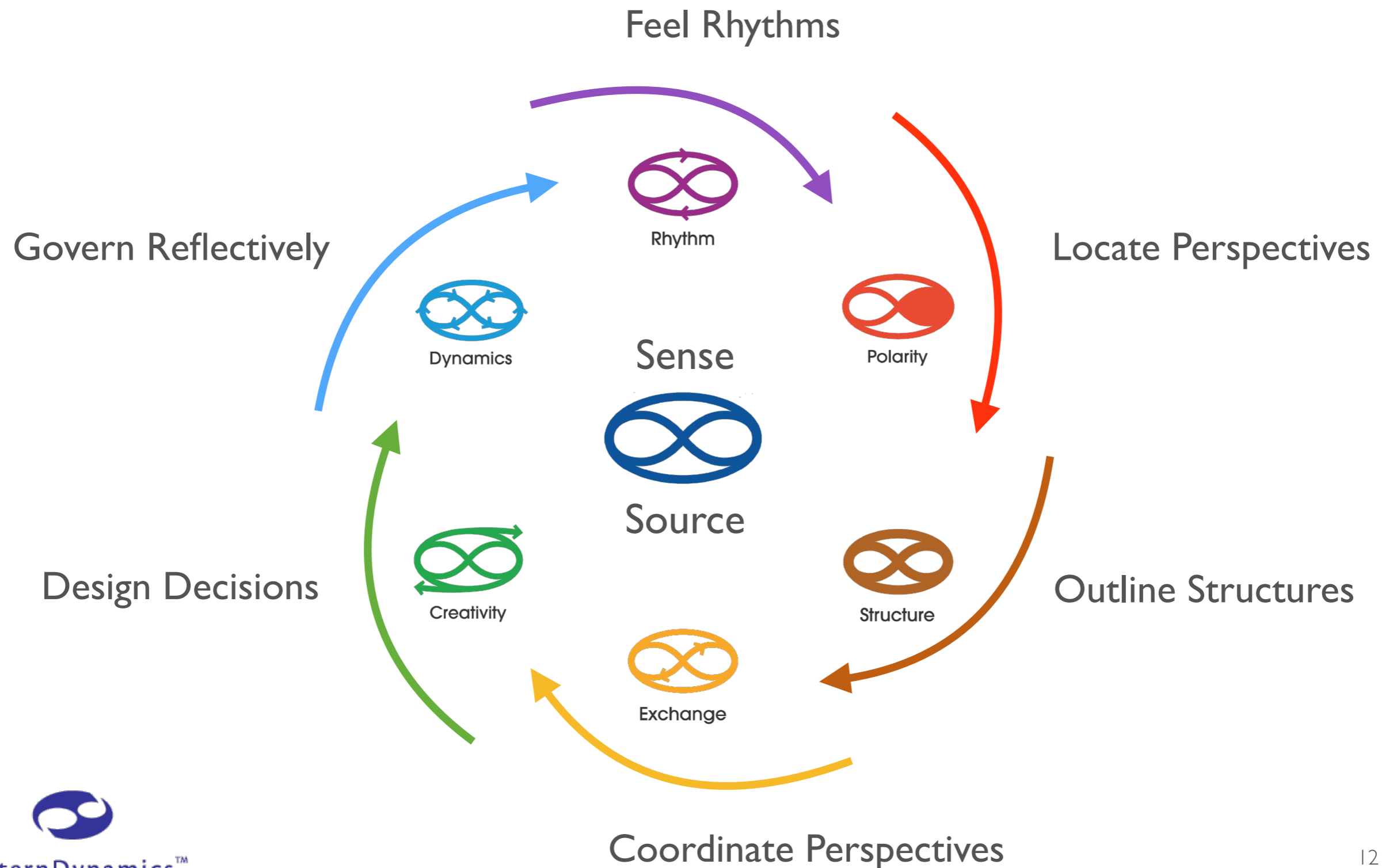
Your Focus

Given your results, which of the 7 Principles would you like to focus on first to improve your self-organisation skills? Choose more than one if you like. You should still work through the exercises for each of the 7 Principles in the next section, but deciding what to prioritise will help you focus your time initially on what's most relevant for you.



3.

The Operating System



Aspects of the Operating System

In order to start using the PatternDynamics™ Operating System (PD OS) itself, you will need to learn more about the 7 Principles by connecting them to their source, the PatternDynamics™ Systems Thinking Framework.

The framework is a set of diagrams or symbols called 'Patterns'. Each Pattern represents a comprehensive description of a living systems principle. It's these principles, based on observations of natural systems and insights from the systems sciences, that are the origin of the 7 Principles of Self-Organisation. The Patterns will help you learn more about each of the Principles, how to communicate about them, when to apply them, and how.

In the Operating System graphic on the previous page, you can see that there is one Pattern diagram associated with each Principle. In the pages that follow, click on a Pattern (link) to view its full description. If you are using a printed copy of this Workbook, you can go to www.patterndynamics.net/patterns to look them up.

To begin using the PD OS you will need to develop the 7 Principles into a set of Practices—specific actions you can take to build your skills when faced with decision making and problem solving challenges.

These Practices form different aspects of the PD OS. Start by practicing them one at a time. Using each one independently will give you a result.

As your skills develop, you can start to combine them. Later in this Workbook we will help you integrate them into a comprehensive process based on the Operating System, called Collaborative Systems Enquiry.

Below is one page for developing each of the 7 Principles into a Practice. On each page you will find an Overview, the 3 Elements of each Practice, its associated Pattern, and an Exercise. To develop your skills repeat this cycle: set a learning goal, learn the material on the relevant page, undertake a small, low-stakes experiment to bring people's attention to what you see, and reflect on the feedback you get when you do this.

Click [here](#) to join an online community where you can share your reflections and get feedback.



Feel Rhythms

Get in touch with timing. Having effective routines and cycles is required for optimising the organisation of any group. However, regularity should not be seen as fixed, or an end in itself—rhythms should be adjusted for both regularity and flexibility as required. The practice of Feeling Rhythms has three elements:

Practice Elements:

- **Sense Cycles:** develop an awareness of repetitions, pulses, swings, and other regularities over time.
- **Introduce Routines:** introduce regularity into activities when required.
- **Adjust Rhythms:** find the optimum balance between regularity and flexibility as circumstances change.

Pattern:



Rhythm is the PatternDynamics™ systems thinking principle associated with the practice of Feeling Rhythms. It reminds us that balancing regularity with flexibility within a system is important for building self-organising capacity.

Exercise:

Feeling Rhythms is an *embodied skill* that requires the ability to sense tensions in relation to timing. Try this exercise a few times in the coming weeks: Notice when you are feeling either emotionally frustrated or excited about the timing of a group process. Where does this emotion show up in your body? Write down what you think needs to be adjusted and why. How could you increase your sensitivity to both challenges and opportunities in relation to synchronising events better in time?



Locate Perspectives

Engage all relevant points of view. Identifying the important stakeholders is essential for accessing all the information required to meet challenges effectively. Importantly, you must seek to verify any assumptions made about the information they hold. Locating Perspectives has three elements:

Practice Elements:

- **Identify Stakeholders:** confirm all important stakeholders and sources of information.
- **Take Perspectives:** prioritise sources and imagine the information they possess.
- **Seek Perspectives:** engage directly with sources to verify available information.

Pattern:



Polarity is the PatternDynamics™ systems thinking principle associated with the practice of Locating Perspectives. It reminds us that identifying all the important *distinctions* (relevant elements) that stand out from the general background is important for building self-organising capacity.

Exercise:

Locating Perspectives is a *perspectival skill* that requires the ability to locate distinct points of view, to imagine what they could tell us, and to verify what they actually do tell us. Try this exercise 3 times. Think about a challenge you are facing and list three important stakeholders. Try to choose people who have a wide range of roles in relation to this situation. Imagine what each of them thinks. What happens when you seek to verify what they think? Did you guess accurately? If so, how accurately? If not, how different were your guesses?



Outline Structures

Draw organisational structures. Graphically representing your organisational architecture brings clarity to roles, accountabilities, relationships, and structures. However, it is important to also document where agreed-on authority lies. Outlining Structures has three elements:

Practice Elements:

- **List Roles and Accountabilities:** record and clarify required roles and their responsibilities.
- **Clarify Authorities:** verify the nature and scope of the agreed-on authority assigned to each role.
- **Draw Structures:** create simple, graphic representations of relationships, roles and authorities.

Pattern:



Structure

Structure is the PatternDynamics™ systems thinking principle associated with Outlining Structures. It reminds us that a clear understanding of a system's *structure* is important for building self-organising capacity.

Exercise:

Outlining Structures is a *graphic skill* that requires the ability to represent organisational architectures, primarily with non-verbal symbols. Try this exercise for three organisations or communities: Use small circles to represent individuals. Use different sized circles to represent different sized groups. Nest circles to show where they are parts of a bigger group. Show relationships by locating circles together or by using connecting lines. Label with words to describe roles and authorities. How is the information contained in your diagrams different from purely written descriptions of the same structures?



Coordinate Perspectives

Use *systems thinking to collaborate*. Coordinating views, through inquiring to identify principles that locate common ground, minimises conflict and optimises cooperation. This process requires the ability to think well and communicate effectively about the wider system. Coordinating Perspectives has three elements:

Practice Elements:

- **Collaborate through Inquiry:** use inquiring conversations to build trust and exchange information.
- **Use Systems Thinking:** think about the wider context and identify principles that unify perspectives.
- **Coordinate Perspectives:** seek agreement regarding important principles and priorities.

Pattern:



Exchange

Exchange is the PatternDynamics™ systems thinking principle associated with Coordinating Perspectives. It reminds us that exchanging information and identifying common principles is required for building self-organising capacity.

Exercise:

Coordinating Perspectives is a *collaborative skill* that requires the ability to communicate effectively, build trust, identify common themes, and facilitate agreement. Try this exercise three times: Identify a challenge. Ask three people their views on meeting this challenge. Listen only and record. Review your records and try to identify common themes and principles. Hint: The *ultimate purpose* of a group should always be one such theme. How does searching for the common ground change the way you perceive a situation?



Design Decisions

Make creative connections for design solutions. More effective problem solving requires the creative association and organisation of previously unconnected ideas. However, proposed solutions can only be optimised if you are able to explain the reasoning behind your choices. Designing Decisions has three elements:

Practice Elements:

- **Connect Ideas:** link your most important ideas to create novel solution prototypes.
- **Design Solutions:** integrate ideas from prototypes to create and decide on a solution to test.
- **Explain Rationale:** explain the reasons behind your decision making process.

Pattern:



Creativity is the PatternDynamics™ systems thinking principle associated with Designing Decisions. It reminds us that making creative connections is important for building self-organising capacity.

Exercise:

Designing Decisions is a *design skill*. It requires the ability to select important elements and themes related to a challenge, connect them in new ways, create well-designed solutions, and explain your thinking. Try this exercise. Seek multiple perspectives to identify important elements of a challenge. Group like elements into themes. See how many creative connections you can make between elements and themes. List three new ideas that emerge from this process. Has this changed how you think about making decisions? If so, how?



Govern Reflectively

Review agreements to govern. Self-organising governance is facilitated by collaborating to establish goals and milestones and recording them in transparent agreements. However, governance is optimised only if all parties reflect on these agreements regularly and modify them as required. Reflective Governing has three elements:

Practice Elements:

- **Set Milestones:** co-create agreed on goals and milestones.
- **Record Agreements:** record roles, accountabilities, tasks and authorities in transparent agreements.
- **Review Progress:** reflect regularly on progress and modifying agreements as required.

Pattern:



Dynamics is the PatternDynamics™ systems thinking principle associated with Governing Reflectively. It reminds us that practicing dynamic steering through reflective leadership is important for building self-organising capacity.

Exercise:

Governing Reflectively is a *leadership skill* that requires the ability to encourage ongoing, collaborative co-creation and reflection in relation to goals, milestones, and agreements. Do this exercise in relation to three agreements you currently have in place, whether they are explicitly recorded or not. Reflect on what has changed since progress started toward the latest milestones. Have these changes affected your goal? Does your agreement need to be modified to get the best outcome?



Source Sensing

Maintain awareness of evolving purpose. Having a clear shared purpose is a powerful *source* of self-organising capacity. However, your purpose will shift and evolve as different challenges help to identify new goals and directions. Source Sensing has three elements:

Practice Elements:

- **Connect to Source:** maintain an awareness of the origin and evolution of your purpose and goals.
- **Sense Tensions:** develop the capacity to sense information pointing to opportunities for change.
- **Adjust the System:** becoming skilled at sensing when and how to make adjustments.

Pattern:



Source is the PatternDynamics™ systems thinking principle associated with Source Sensing. It reminds us that being sensitive to emergent challenges and opportunities for change is important for building self-organising capacity.

Exercise:

Source Sensing is an *intuitive skill* that requires present awareness of sensations, perceptions, emotions, ideas, and narratives. Do this exercise during group discussions. Focus on being relaxed, present, and aware. Make your breathing deep, regular, and slow. What are the subtler kinds of stimuli that you are aware of? Try and connect them to tensions in the group that might signal a need for change?



4. Collaborative Systems Enquiry

Ok, you've got a sense of the living systems view, learned some Principles, been introduced to a set of Patterns, and started to develop some deeper Practices. Now it's time to take your skill building to the next level and integrate everything you've learned.

You will have noticed that the Operating System diagram contains a number of coloured arrows. These indicate that the aspects of the OS form a natural problem solving or learning loop. This cycle lies at the heart of the self-organising process. You can strengthen it by sensing where aspects of the process might be missing or out of balance and by helping groups learn to restore that balance.

When you start to put all the elements of the OS together we call that process Collaborative Systems Enquiry (CSE).

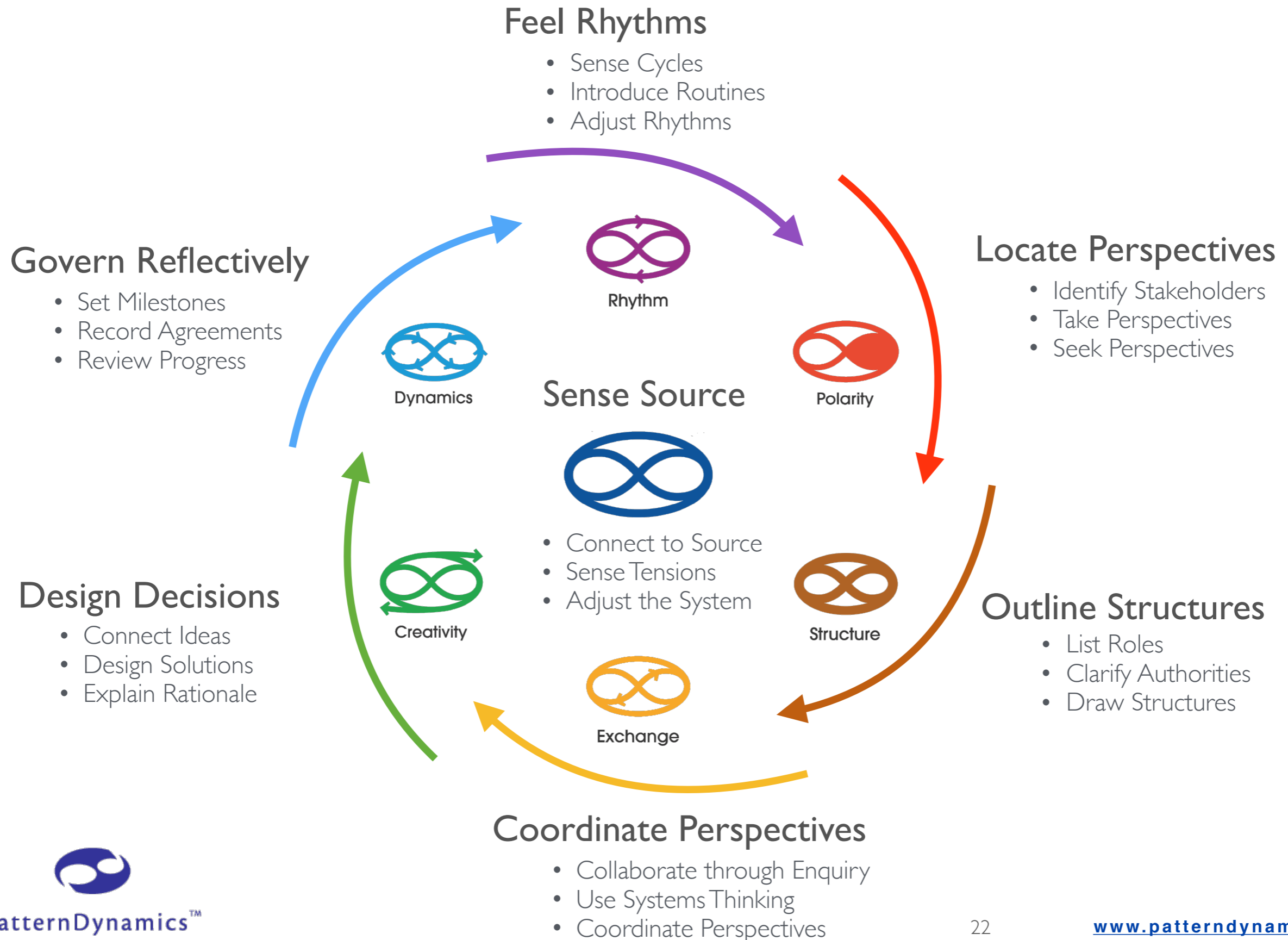
We're going to start with a step by step approach to CSE, where you move through each aspect of the OS in sequence. When you become more practiced, you'll be able to shift around the OS more intuitively. *As you head toward mastery, it will serve more as a set of touchstones, enabling your own more spontaneous and fluid interpretations.* At this stage, though, it's a good idea to keep the PD OS on a Page, below, open as you learn to practice Collaborative Systems Enquiry.

All groups have operating systems, either explicit ones that they are conscious of, or implicit ones that have developed in a more unconscious, ad hoc way. By using Collaborative Systems Enquiry you don't need to impose a new system or restructure existing ones. The method used in CSE is to seamlessly and organically demonstrate the benefits of upgrading to a more purpose-driven, systemically informed, collaborative processes.

Have a look at the PD OS diagram on the next page. You'll notice that the 3 Elements have been added under their respective Principles.



Collaborative Systems Enquiry



Run the Operating System

Now its time to run the operating system and start learning to practice Collaborative Systems Enquiry. We've provided a Performance Chart on the next page and a related Exercise to get you started. Again, as you feel more comfortable you can start to put the supports aside and integrate CSE into your own personal way of doing things.

To begin the Performance Chart Exercise, pick a group process you are participating in where decisions are being made and outcomes are trying to be achieved. Shorter processes are better to begin with—for example, a team meeting or a monthly strategy session. During and after that process work your way through the OS Performance Card on page 24 and evaluate where the group, as a whole, generally falls with regard to the elements of each principle.

The performance indicators are:

- **Low Performance:** where the practice is virtually non existent, poorly understood, and not getting results.
- **Medium Performance:** where it's sometimes used, only partially understood, and getting only limited results.
- **High Performance:** where it's fully integrated, understood by everyone, and getting optimal results.

The chart will help you think about each element of the OS, how competent your group is generally at working with these elements, and to aspects of the group process were you might start to add your insights as a way of fostering CSE.

When you do start reflecting insights you have gained from using the Operating System, try to practice this in a seamless way that allows you to start gaining influence. Do this by making observations and posing enquiries. Your influence should develop by virtue of your ability to see the dynamics at work in a process and to support conversations about how these dynamics might need to be adjusted. Remember, you don't need immediate, tangible result every time. Your goal is to help the group become aware of the the value of a more collaborative approach, to help them learn to enquire about the state of their system, and how they might balance it for healthier, higher functioning in pursuit of their goals.

To develop your skills repeat this cycle: 1) set a learning goal, 2) learn the material on the relevant page, 3) undertake a small, low-stakes experiment based on what you observe, and 4) reflect on the feedback you get.



PD OS Performance Chart

Performance Indicators	Low	Medium	High
	1	2	3

Practices		Status	Notes
Feel Rhythms	• Sense Cycles		
	• Introduce Routines		
	• Adjust Rhythms		
Locate Perspectives	• Identify Stakeholders		
	• Take Perspectives		
	• Seek Perspectives		
Outline Structure	• List Roles and Accountabilities		
	• Clarify Authorities		
	• Draw Structures		
Coordinate Perspectives	• Collaborate Through Enquiry		
	• Use Systems Thinking		
	• Coordinate Perspectives		
Design Decisions	• Connect Ideas		
	• Design Solutions		
	• Explain Rationale		
Govern Reflectively	• Set Milestones		
	• Record Agreements		
	• Review Progress		
Sense Source	• Connect to Source		
	• Sense Tensions		
	• Adjust the System		



Next Steps:

You may have noticed that the OS acts as a virtuous cycle of practice. The more cycling you do, the more you gain the benefits of employing an increasingly adaptive, open and innovative operating model, which encourages more practice—and on it goes. To get support with your virtuous cycling, and to learn more Patterns, Principles, and Practices [click here](#) and join the PD forum training community:

Join:



PatternDynamics Forum Training Community



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In Plain English:

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