PatternDynamics™
thrive in complexity

Flocks not Clocks

How Mass Self-Organisation Changes Everything

The PatternDynamics ™ Operating System Workbook

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

www.patterndynamics.net

PD OM Workbook v3.4.5

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1. Quick Start Guide

How Mass Self-Organisation Changes Everything

> *Self-organisation depends, more than anything else, on developing the quality and richness of our relationships.*

It's as simple as starting there. The great misunderstanding and the great flaw in our currently dominant, mechanistic world-view is that we should focus on 'the system'–*out there*. Too often that's a distraction from what really matters and what's harder to contemplate, but ultimately more rewarding–changing what's inside of us so that we are able to change what is *between* us. Learning to create better relationships is the most reliable, and some would say *the only*, way to really change our systems for the better.

Facilitating more widely distributed self-organising capacity must be one of the central strategies for managing the challenges of an increasingly complex world. At PatternDynamics™ we can help you develop skills for doing that. You can get started with this Workbook. But, self-organisation skills are not primarily tools for 'managing' groups or organisations (although they can help), they are, first and foremost, an opportunity to grow by spreading the artistry and science of creating deeper connections.

That is the real reason mass self-organisation changes everything.

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, form relationships 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 highly structured fashion, like the cogs or springs in a clock. Research indicates that as 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

The 7 Principles of Self-Organisation

You can get started very simply. Remember how birds use 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. Notice that in applying each principle there is an opportunity to develop your relationships. In the following sections of this Workbook, you will have the opportunity to learn about the principles in more depth and to apply them as more detailed practices. For now, just imagine that, like a flock of birds, deciding on adjustments based on these living systems principles will contribute to emergent solutions.

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 talk to to locate relevant points of view?
3) **Outline** Organisational Structures:	Are key organisational structures represented as simple graphics? How could you update your organisational charts?
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?
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 purpose? If so, what adjustments could be made in relation to the principles above?

Ok, But How Does This Actually Work?

You may have noticed that you do many of these things already–intuitively, without really giving it much thought–and that so do the people around you. Self-Organisation, in the way it is described here, happens all the time. In any group, everyone makes dozens or even hundreds of different decisions, big and small, every day that are essential in order for groups to function well. However, conventional management practices are founded in a mechanistic view, where individuals are passive elements in the use of top-down control. The reality is that people are active participants in a living system and that bottom-up influence is, at least, equally important.

This is the essence of the democratic principle–that participation from the base of a hierarchy matters. **PatternDynamics works by empowering effective democratic, bottom-up participation in groups, communities, and organisations.**

It does this in a number of key ways that it is useful to think about as you use the 7 Principles:

- Increases awareness of bottom-up processes by promoting a living systems view.
- Provides a language to identify and communicate about self-organisation clearly.
- Prescribes a simple set of principles to work by and to share.
- Improves collaboration by providing a consistent framework.
- Encourages a set of practical, embeddable practices that build self-organisation skills.
- Designed for getting started quickly and sharing easily.
- Allows individuals to use their own initiative to demonstrate improved self-organisation.
- Promotes a low-risk transformation strategy that's designed to spread organically.

2. Assess Your Capability

You'd like to gain skills to help your organisation or community shift to 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.

If you are working on this with a team or a group, feel free to bring them into this process.

The Living Systems Context

On the next page, we'll go through some reflective questions. As well as helping you understand more about your group or organisation, this assessment will also help you get a sense of some of the important general characteristics of living systems. 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 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 challenges are met simply and effectively using a more self-organising approach?

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Evaluating Your Current State

Now we're going to have a look at how *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 *and* inquire *of them* 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 *and* 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.

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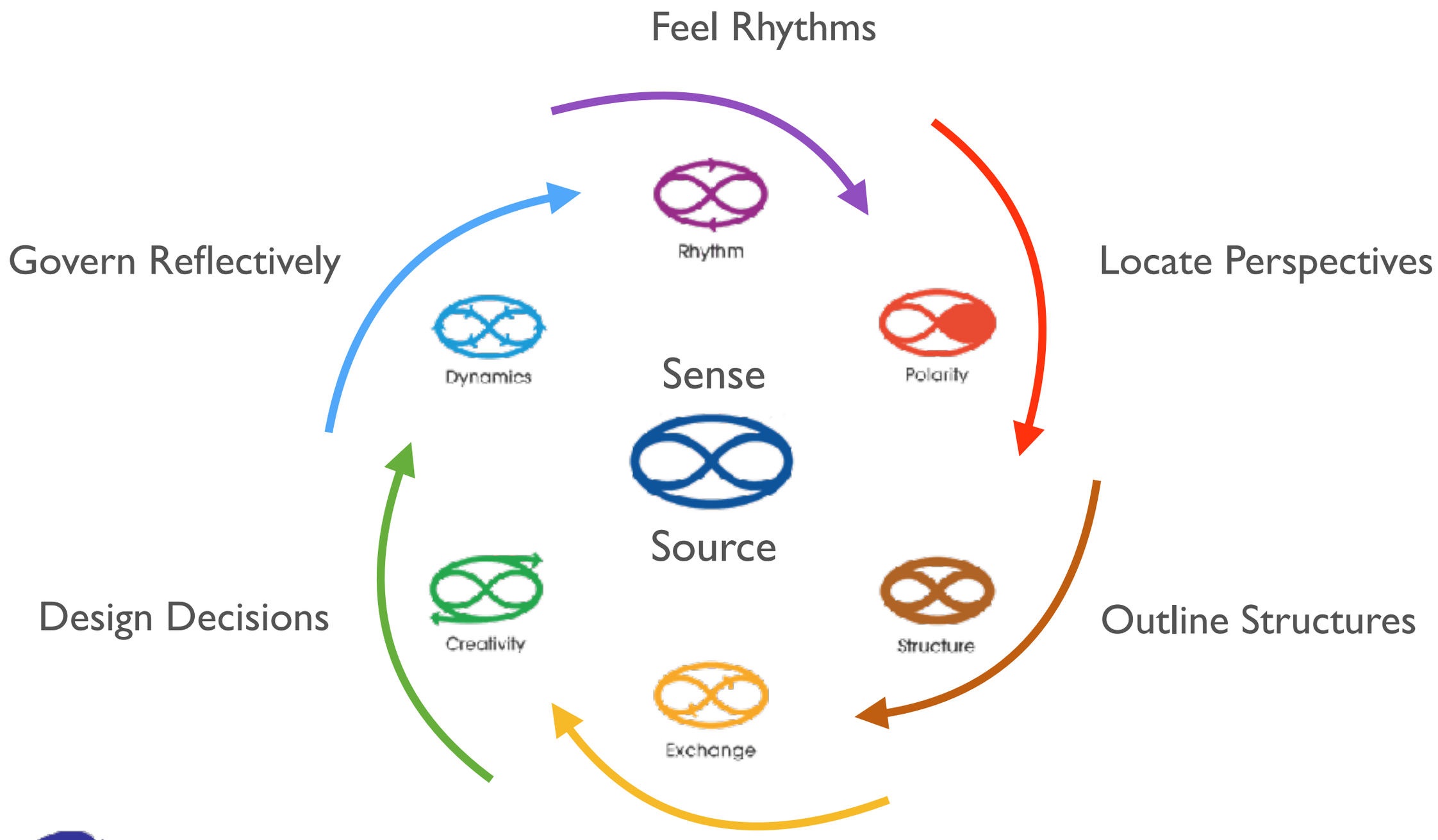
3. Using the Operating System



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Principles, Patterns and Practices

In order to start using the 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, when to apply them, and how. Deepening your recognition and communication of how living systems are organised is one of the keys to mastery in facilitating self-organisation.

In the Operating System graphic on the previous page, you can see that there is one Pattern associated with each Principle. In the pages that follow, click on a Pattern to view its full description. If you have 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 also need to develop the Principles into a set of Practices–specific actions you can take to build your skills when faced with decision making and problem solving challenges.

Below is one page for developing each of the 7 Practices. On each page you will find an Overview, 3 Elements of each Practice, its associated Pattern, and an Exercise. Learn, undertake, and reflect on these regularly. You should get benefits as you are practicing each one, but it is when you learn to integrate them into an ongoing adaptive process that you will get the best results.

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?

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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

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 tells 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?

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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 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 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 *relational 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?

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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

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?

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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?

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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 aware of? Try and connect them to tensions in the group that might signal a need for change?

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Run the Operating System

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.

We're going to start with a step by step process, but as you become more practiced, you'll be able to use the PD 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.* Even at this stage, though, its a good idea to keep the OS handy as a reference.

Pick a group challenge and work your way through the Health Check Card on page 26. Use the PD Operating Model on a Page, below, as a reference guide and follow the cycle. 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.

Continue with repeated cycles of the OS. Work towards high performance (3 points) in each box. Using the Health Check Chart and following the steps in the OS cycle are a great way to get started, but they're a bit like training wheels–when you're ready, you'll want to move beyond them to enjoy a more free flowing experience.

The difference between the PD OS and other more distributed or networked organisational operating systems is that its *not* primarily a system–it's a *practice*. Your colleagues won't necessarily know about your practice, and if they do, or if others are practicing with you, no one will have to face the disruptions of conforming to a new system. They should just enjoy the benefits as your practice builds better relationships and enhances the group's natural capacity for self-organisation.

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Collaborative Systems Enquiry

PD Operating System on a Page

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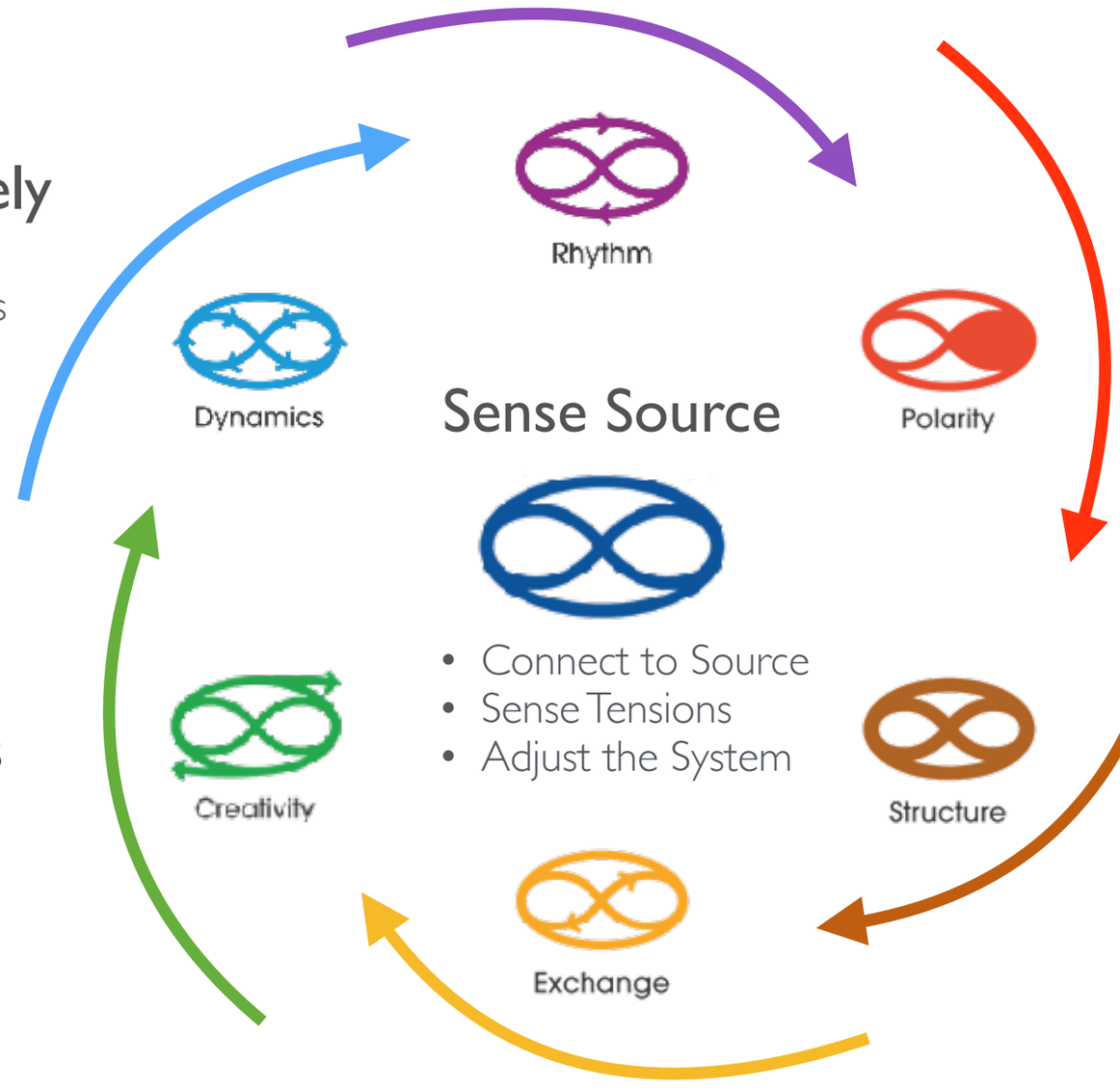
Feel Rhythms

- Sense Cycles
- Introduce Routines
- Adjust Rhythms

Govern Reflectively

- Set Milestones
- Record Agreements
- Review Progress



Locate Perspectives

- Identify Stakeholders
- Take Perspectives
- Seek Perspectives

Design Decisions

- Connect Ideas
- Design Solutions
- Explain Rationale

- Connect to Source
- Sense Tensions
- Adjust the System

Outline Structures

- List Roles
- Clarify Authorities
- Draw Structures

Coordinate Perspectives

- Collaborate through Enquiry
- Use Systems Thinking
- Coordinate Perspectives

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PD OS Health Check 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 Accountabilites		
	• Clarify Authorities		
	• Draw Structures		
Coordinate Perspectives	• CollaborateThrough 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		

The Source Course

The Source Course is a simple exercise that will help you, and others, learn to deepen your understanding of this foundational Principle of Self-Organisation. It will also demonstrate how to think about finding the optimal balance for any principle you are working with, in any context.

Source represents a shared primary ethic of fostering generative health.

Its power lies in the fact that generating health–living systems' unrelenting drive to create the conditions that will support healthier, more enduring living systems–is the deepest inclination of a self-organising universe.

Not only is Source the central organising principle of PatternDynamics itself, it can act as a guiding star for self-organising activity within any group, community, or organisation.

As you will see, to work with Source we need to balance three primary principles of systems health:

- the balance between *parts* (individuals) and the *whole* (the collective)
- the balance between *tangible* results and *intangible* value
- the balance between *short term* outcomes and *long term* viability

Follow the instructions on the next page. You can also print and distribute the Source Course pages and do this as a group exercise.

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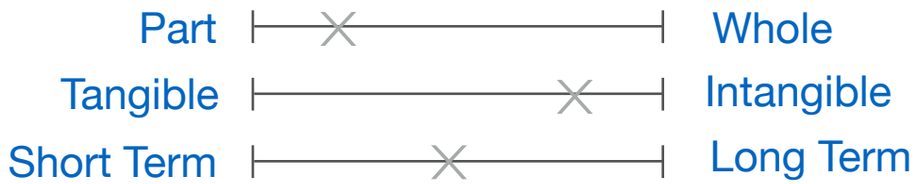
Instructions



1. Print out the Source Course page below and give everyone in your team a copy and/or draw the Source symbol and slider bars on a whiteboard or flip chart.

2. Explain that the purpose of this exercise is to practice discovering broader principles that will help you locate the common ground across your diverse points of view.

3. Write a short, agreed on, statement of the ultimate purpose of your work together, Establish the relevance of meeting this particular challenge to fulfilling your purpose.

4. Consider each person's views, on how best to decide how to meet this challenge, in relation to the three principles on the right.

5. Map each team member's perspective by marking a coloured 'X' onto each of the 3 slider bars. Use a different coloured 'X' for each person.

6. Determine where to place each person's Xes using a group discussion to determine if:
   - the view prioritises a part of the organisation, the whole organisation, or somewhere in between.
   - use the same process in relation to the other two principles.

7. **So What?** How could reflecting on the different views this way help you to agree on what to prioritise at this time, and what might need to be prioritised at another time?

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Source

The Source Pattern above signifies the universal organising power of sharing deep collective purpose. The diagram itself represents 3 related foundational *living systems principles*:

1. The relationship between parts and wholes.
   - The two inner shapes represent parts of a system (e.g. an individual), the outer oval the whole (e.g. the organisation).
2. The relationship between tangible results and intangible capital.
   - The blue lines represent the more tangible aspects of systems (e.g. $) and the white space that defines them, the less tangible value (e.g. trust building).
3. The relationship between short term outcomes and longer term viability.
   - the infinity symbol in the middle represents long term horizons (e.g. sustainability of the organisation) and the oval on the outside a shorter single cycle (e.g. immediate results).

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Source

Part — Whole

Tangible — Intangible

Short Term — Long Term

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4. Reflect and Deepen

What Did You Notice?

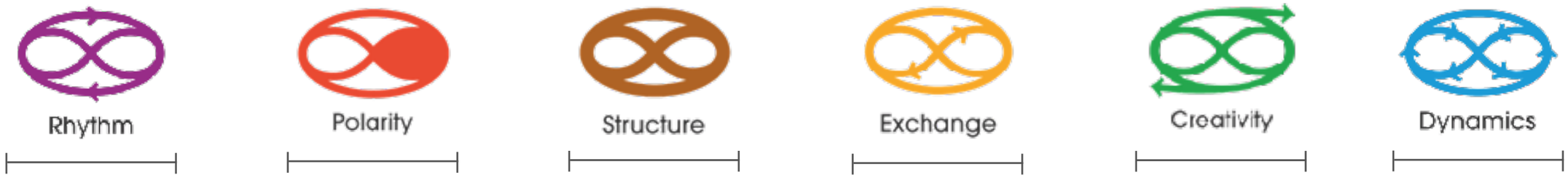
What emerged as new, interesting, or important?

Given your reflections above, what do you think is the single most highly leveraged change you can make to improve your self-organisation skills? What commitments can you make to ensure that you work on making this improvement? Who could help keep you accountable?

Finding the Balance

In the Source Course, you practiced reflecting on the balance of each of Source's three principles. Learning to recognise the balance represented by a point of view, in relation to a range of different principles of organisation, is a key to attaining mastery in applying the living systems view.

To continue to develop your practice, see if you can identify how different perspectives are balanced in relation to the Principles represented by the other Patterns in the PD Framework. Click on the ones below for descriptions. Place marks on the sliders until you can sense the balance intuitively, without this supporting activity.



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 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 and Principles click here and join the PD forum training community:

Join: PatternDynamics Forum Training Community

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