Hello again,

This is the third report (one of a planned four reports) for friends and colleagues who teach Sociocracy or are interested in it, and especially in intentional communities.

Some of the homes in the Titleholders Association in The Park.

It's about what else I learned during my visit to the Findhorn Community in July re how people learn and use Sociocracy in a community setting. As noted before, after the GEN Conference I stayed on to be a consultant with Robert Gilman for the "Working Group for Change" for the Findhorn Community.

This report focuses on what I learned about how some organizations there use or partially use some aspects of Sociocracy, the benefits and challenges they've experienced, and what this has shown me about teaching Sociocracy more effectively for intentional communities.

Informal consultations. East Whins is a relatively new 50-member cohousing neighborhood in The Park. They'd been having challenges in meetings so an East Whins member asked me to do an informal consultation, and I did. I also visited with the manager of Moray Carshare, a 40-member, nine-car regional car co-op. And I visited with the president and another member of the Titleholder's Association, a governing organization for the four individual housing developments in The Park (where people own their own homes). All of these organizations use Sociocracy.

Some members of Moray Carshare and one of their fuel-efficient cars.

When some members of the group haven't learned Sociocracy. As a result I learned more about what can happen when some but not all members of a group learn Sociocracy and their group adopts it.

(1) Some members of a group may understand and use Sociocracy. But other members don't -- members who participate in meetings with full decision-making rights! This is because these members haven't taken a workshop or participated in a Sociocracy study group. Or they have, but still don't understand how it works. And they may, inadvertently or even on purpose, undermine the use of Sociocracy in meetings.

(2) The group understands and uses a few but not all parts of Sociocracy, perhaps

because they didn't remember the other parts or never used them.

(3) Some members only partially understand one or more parts of Sociocracy and thus use a kind of "partial Sociocracy" instead of actual Sociocracy.

Or all three at once. Some group members understand some but not other parts of Sociocracy; some only partially understand some parts of Sociocracy and use them incorrectly; and some group members don't understand Sociocracy at all. Not only that, they actively fight against the facilitator when he or she attempts to facilitate a Sociocratic process. Ouch!

East Whins Cohousing, one of the housing developments of The Park.

In my informal consultation I learned that East Whins had the some of these situations. I reviewed some aspects of Sociocracy, including the elections process, with my large wall posters of the steps of each meeting process in large letters, and by drawing diagrams what I was saying on a flip chart.

It seemed to go well, as people were having "aha" experiences with this review. They would be electing their annual officers the following night, so I loaned them my wall poster for the elections process. Fortunately Ariane Burgess, who along with Jane Hera is a Sociocracy trainer and coach in the Community, served as facilitator for the election. Several East Whins members told me they found the review very helpful, and said the elections process went really well the next night (perhaps because of a combination of the review, the poster -- and of course having Ariane as an experienced facilitator).

One of the wall posters, at a workshop at Baja BioSana Ecovillage in Mexico.

A sudden influx of new members. In one group at Findhorn, only the founder and manager, who facilitated meetings, and a few other original members knew Sociocracy. Then

the group attracted many new people. At that point far more group members, both old and new, had no idea what the facilitator was doing in the steps of consent decision-making. This frustrated and annoyed them because of their expectations of long discussions about each issue from their past experiences of consensus, and made it much harder for the manager to facilitate meetings too. (See "The facilitator's dilemma," below.)

Frustrated feedback loops. Another group in the Park that uses Sociocracy, and which has all three of the difficulties described above, had attempted to build a feedback loop into a proposal about a controversial issue. However, instead of including criteria in the proposal for how they would later measure and evaluate the proposal once it was implemented, they used an old consensus tool, the "sunset clause." Thus their proposal said something like, "Unless people feel they can live with the situation, we'll get rid of it."

They hadn't clearly defined what they meant with "can live with," or how many people would need to "live with it" before they got rid of it. If their proposal had said something like, "After we implement it we'll measure it according to 1, 2, 3, etc., and at the _____ meeting we'll evaluate it using the following criteria 1, 2, 3, etc.," that could have worked.

However, they *also* would have needed to understand that they would have three choices in that evaluation meeting: keep the implemented proposal as it was, change it in various win/win ways (which John Buck calls seeking a "both/and" solution), or get rid of it. But they seemed not to know this aspect of feedback loops either.

Some of members of this group had studied Sociocracy but most others hadn't. So unfortunately they were stuck with the "get rid of it" wording of the original proposal.

In their evaluation meeting most people (dozens of people) loved the implemented proposal and wanted to keep it. Three members (and one soon moving away anyway) were negatively impacted by it and couldn't "live with it."

As you can imagine, this was an emotional meeting, with a few adamant about getting rid of it and the rest pleading to keep it. This lead to a conflict in the group over the next few months between the majority who were "pro" and the remaining two who were "con."

Excruciating elections. Another story I heard was when a group wanted to choose someone for a special new role. Some of its members had studied Sociocracy but most had not. They wanted to use Sociocracy elections to chose the person for the new role, although they'd never used it before.

A member who had studied Sociocracy was asked to facilitate the election. She tried mightily to keep to the steps of the process, but most people didn't understand how it worked so there was confusion and conflict. It wasn't clear that people should only nominate, consent to, or object to someone based on the criteria for the role. And most didn't understand that they could *really* change their nominations in the change round and it wasn't considered insulting to the person they'd nominated first. It wasn't clear that if there were an equal number of nominations for two different people, the facilitator uses her best judgment to pick the candidate with the strongest arguments for their suitability for the role, or simply chooses one.

The process generated confusion and conflict for the novice facilitator and for the group, although eventually they did elect someone.

The facilitator's dilemma. This facilitator had an awful dilemma. She could continue going through each step of the elections process, no matter that most others didn't know what she was doing or why, and be blamed as an autocrat using power-over ploys. Or, she could acquiesce to the group's pressure to do what they already knew and stop doing the elections process, and thus cobble together some awkward hybrid of consensus and voting on the spot. She stuck to the Sociocracy elections process and got blamed.

I call this blaming — whether in an elections process or in any other Sociocratic meeting process — the facilitator's dilemma.

This is when the group has agreed to use Sociocracy but many or most don't understand it. They expect the consensus process they are familiar with (even if they just had a quick lesson in the Sociocracy method). So when the facilitator, say, conducts a consent round or seeks objections and ways to resolve them, it seems like he or she is *personally* trying to force people into a mold they don't want. Meanwhile the facilitator, *who usually knows more about Sociocracy than anyone else in the group,* keeps bravely plugging

away at the steps of the process, even though there is increasing resistance in the room. Finally there's an eruption of criticism and blame towards the facilitator by those who can't understand why they're not getting what they want.

This has happened to me in my own community (it was awful!). It happened to a Sociocracy trainer friend in Spain in his former now-disbanded community. It happened to the facilitator of the controversial proposal described above. It's happened to John Buck!

The very fact that the facilitator knows Sociocracy so much better than anyone else, and maybe was the original advocate for it, results in their being a target for the group's blame! Catch-22.

The stories I learned at Findhorn, and my own and others' experiences facilitating consent decision-making and elections, have convinced me that for an intentional community or member-led group to use Sociocracy effectively it's not enough that some group members get Sociocracy training in a workshop. Here's how I see it now:

(1) The group understands the need for ongoing training or periodic reviews, such as with an ongoing Sociocracy study group and/or an in-house coach. Or they have in-person or online consultations with a Sociocracy trainer. They use an outside Sociocracy facilitator when they can.

(2) The group makes sure all members learn Sociocracy — especially new incoming people. They get training for their new people and don't assume new folks will just "pick it up" by attending meetings. (It doesn't work that way!)

And . . . group members who do not or will not learn Sociocracy for whatever reason *nevertheless agree to support the group in using it* (perhaps by signing a written agreement saying this?) and to *not* undermine the facilitator!

(3) Since the parts of Sociocracy work together to provide efficient governance and effective meetings, the group uses all or mostly all of the parts of Sociocracy.

Here's the advice I have the people I talked with at Findhorn:

* Please get all your people trained! Organize a Sociocracy workshop for your people and/or an ongoing study group. Arrange training for new people in Sociocracy before they have full decision-making rights. Designate an in-house Sociocracy coach, with coaching in turn from a Sociocracy trainer. Two Sociocracy trainers, Ariane Burgess and Jane Hera, live right here!

* Use experienced outside Sociocracy facilitators whenever possible. Jane and Ariane!

* Help group members learn to create feedback loops that work well, with specific ways to measure and evaluate an implemented proposal built into the wording of the proposal. (I now teach this process very specifically in workshops. One of my practice exercises for that is attached below.)

* Don't use the elections process for significant "live" issues when the group is new to or untrained in Sociocracy. Practice first on simulated and small, low-content real situations. And make sure the group also knows consent decision-making. They need to know what rounds are, what objections are and resolutions of objections.

* And John Buck's advice: Groups using Sociocracy often lose in their understanding and practice of Sociocracy over time — they tend to revert to what a consensus-like model if they used consensus before, unless the group builds in periodic review trainings and/or ongoing coaching!

The fourth and last report will be about what I learned in conversations with Markus Spitzer, an Austrian community founder and Sociocracy trainer who was visiting Findhorn at the time.

All good wishes,

Diana