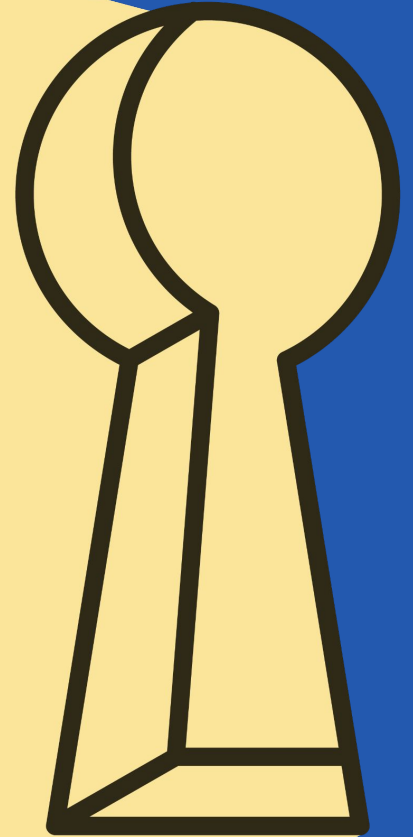


EQUITABLE GOVERNANCE AND CONSENT-BASED DECISION MAKING: An Intro to Sociocracy

Presented by Justin Birdsong & Simone Carvalho
Nonprofit Technology Conference - March 2024
Collaborative Notes: <https://nten.link/30PHREh>

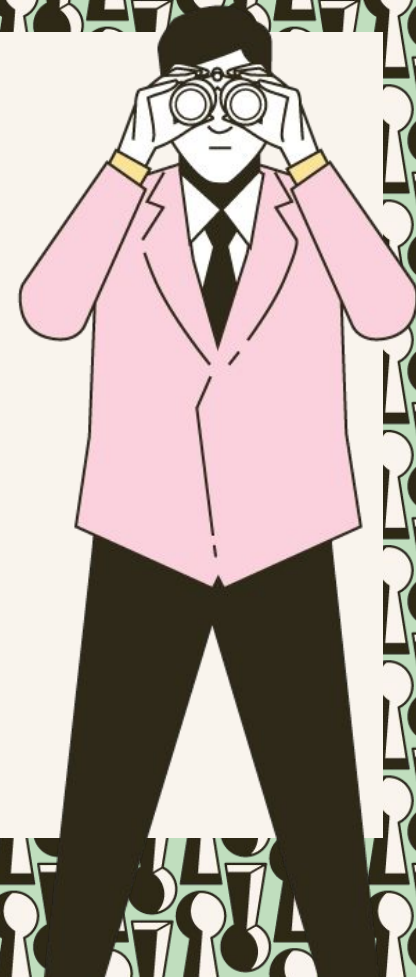
Skeleton Key
STRATEGIES



AGENDA

- Introductions & Check-in Rounds
- Workshop Goals
- The Meat of Things:
 - Defining Sociocracy
 - Decision-Making Methods
 - Circle Structures
 - Consent-Based Decision Making
 - Consent Process
- Consent Process Group Activity
- Reflection / Q & A
- Summary & Wrap-Up

Collaborative Notes: <https://nten.link/3OPHREh>





Skeleton Key

STRATEGIES

We are a strategy consulting firm that helps nonprofit Fundraising, Marketing, & Data experts to own and operationalize their technology and data for maximum impact.

SkeletonKeyStrategies.com



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**SIMONE
CARVALHO**
she/her
Principal
Consultant



Selected
Clients





ACTIVITY:

Check-in Rounds



After this session, you will be able to:

- Understand the basics of sociocracy, including circle structures, domains and aims, and linking roles.
- Practice a basic sociocratic decision-making process, using rounds and integrating objections.
- Understand how a sociocratic approach helps improve equity and inclusivity in decision making.

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Sociocracy For All

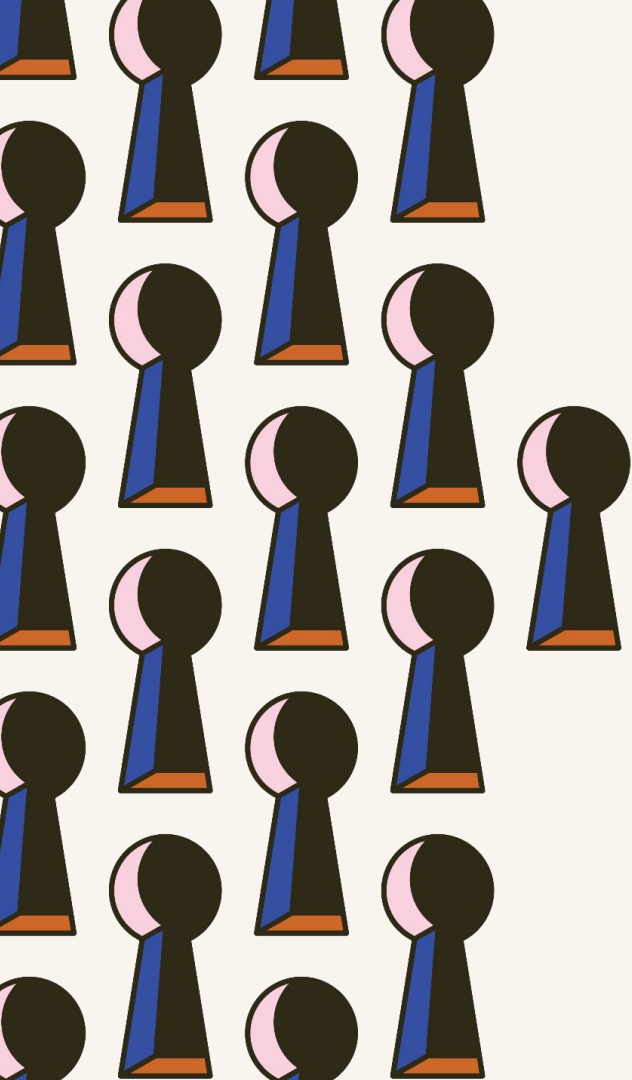
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Two points of order:

- This session is not so much about technology – but these tools are *highly* applicable to tech projects.
- I spent 2023 studying these concepts in a year-long Sociocracy Academy with Sociocracy for All.





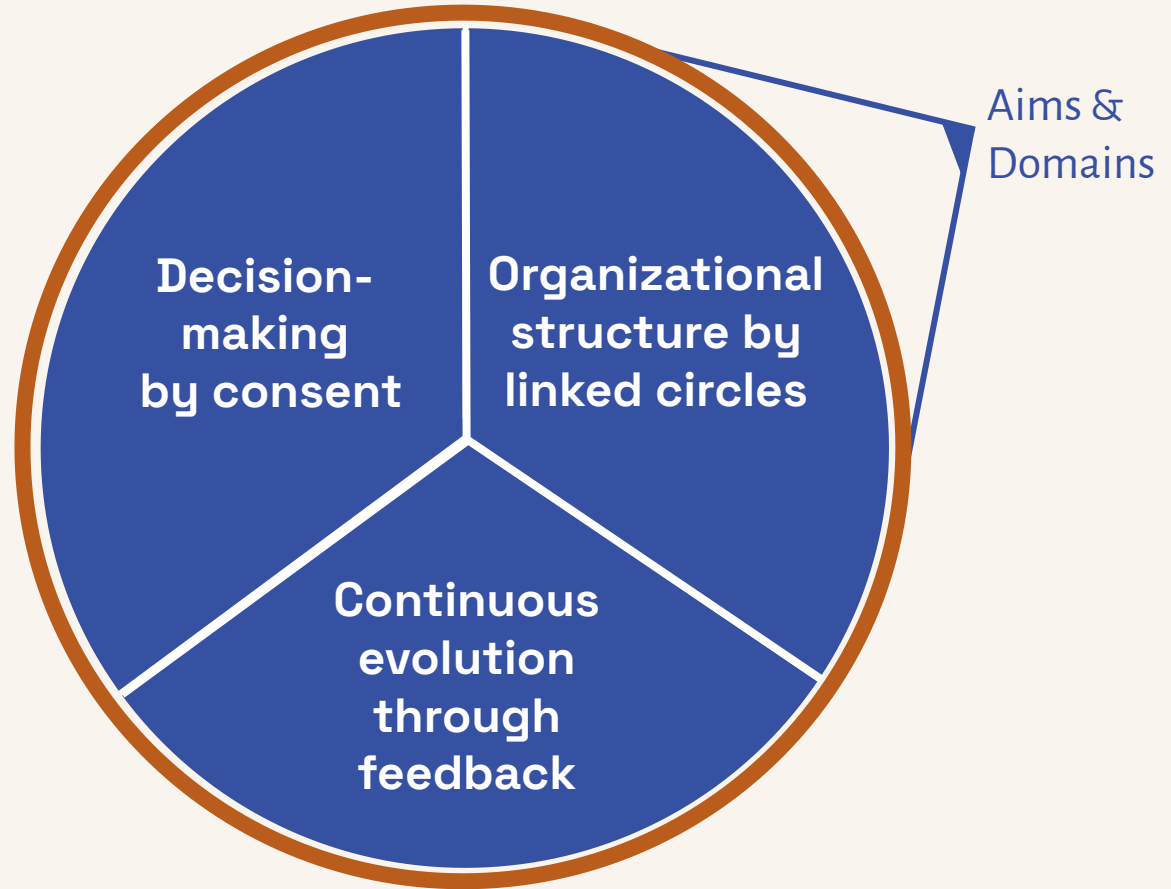
Defining Sociocracy

Defining Sociocracy



Also known as “Dynamic Governance,” Sociocracy is a peer governance system based on consent.

Sociocracy aims to **decentralize power and decision making** to achieve more **effective and egalitarian** outcomes.



Sociocracy and Power



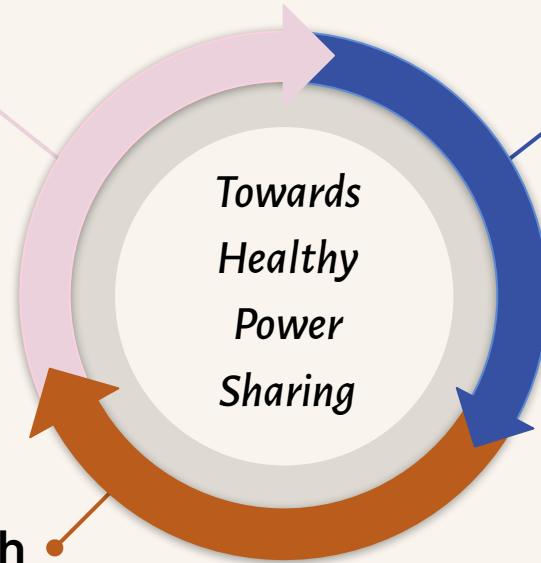
Encourage Power To

Question our own power and how it affects others

Support and encourage each other

Support Power With

Empower people in their roles, create space for co-creation (everyone's ideas heard / included), and make space to talk about power



Limit Power Over

Implicit to explicit power-sharing agreements

Practice consent (and welcome objections / dissenting voices)

Aim: a workable distribution of authority and decision making that enhances well-being, supports creativity, and is effective for everyone.



How does this sound
to you?





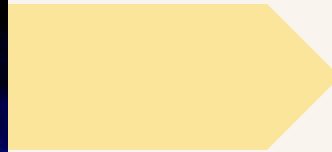
Implementing Sociocracy is HARD.

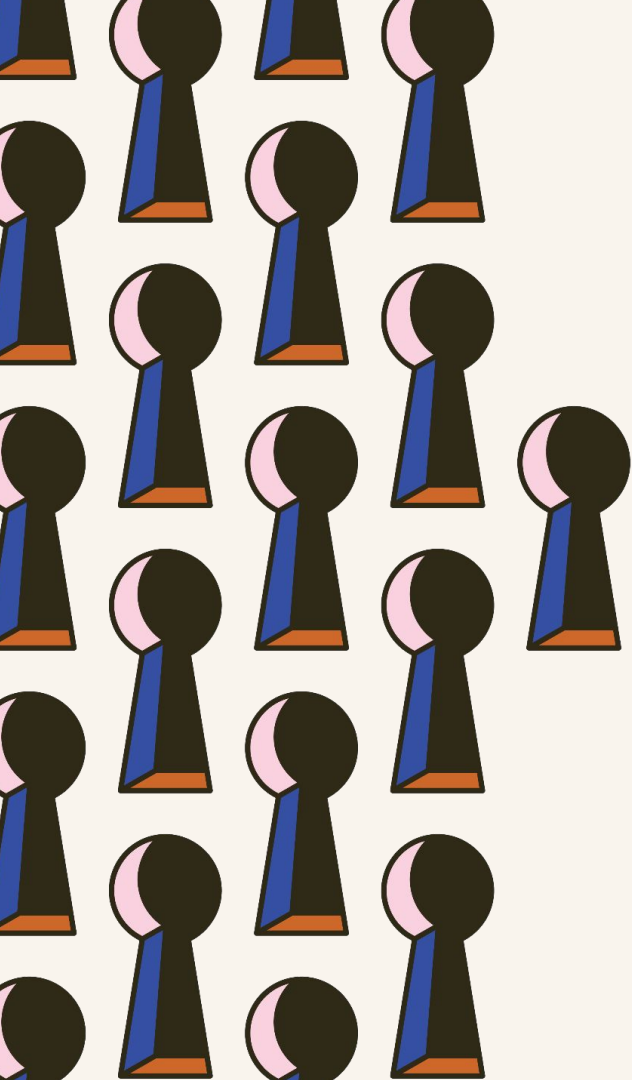
Can anyone guess why?



**ALL ABOUT
CONTROL**

Transformation vs. Toolbox



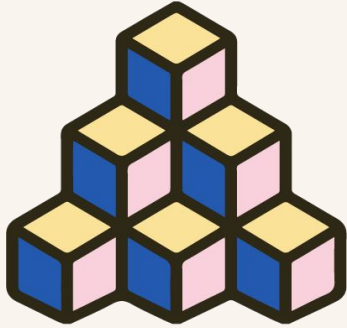


Decision-Making Methods

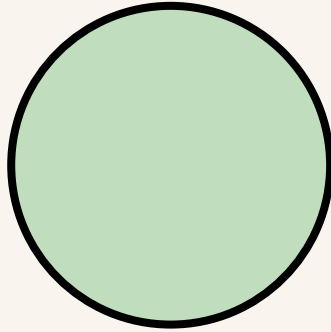
To Structure, or Not to Structure? —



That is the Question!



Hierarchy

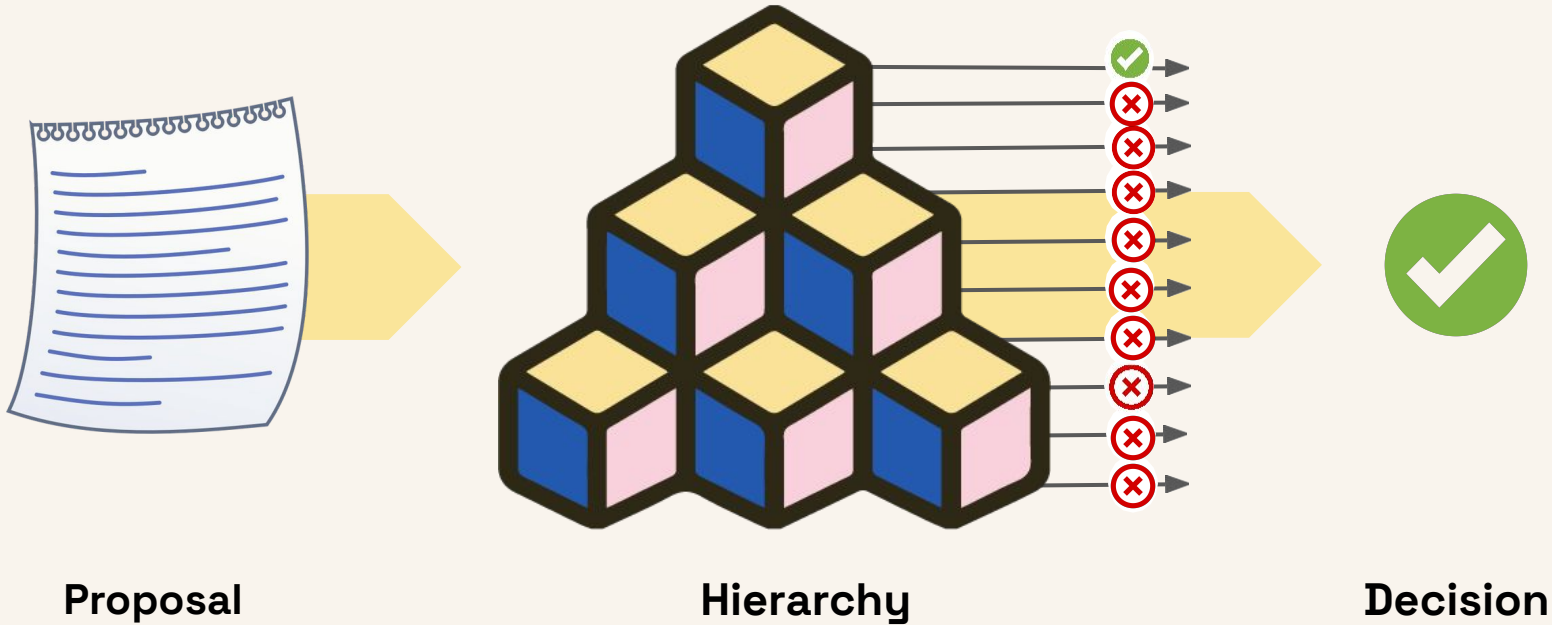


Flat

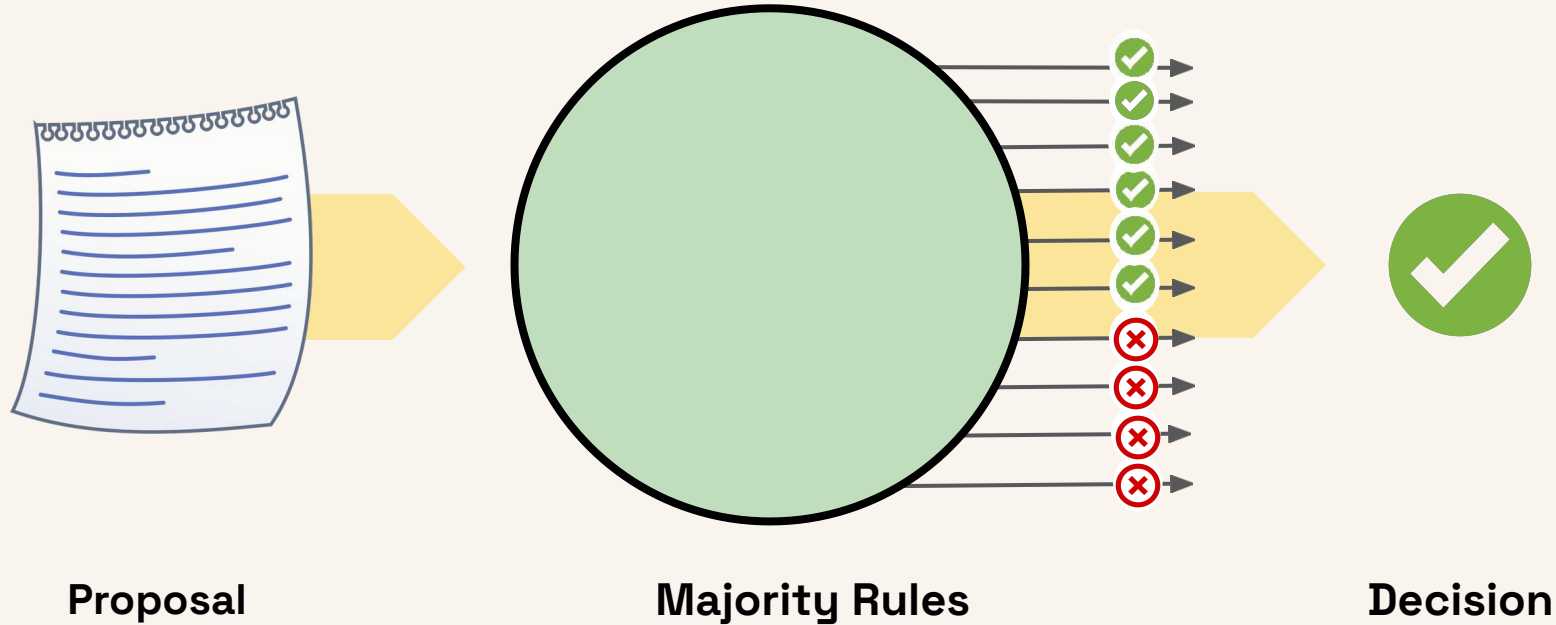


No Structure

Top-Down Hierarchy / Autocratic



Flat / Consensus / Democratic



No Structure



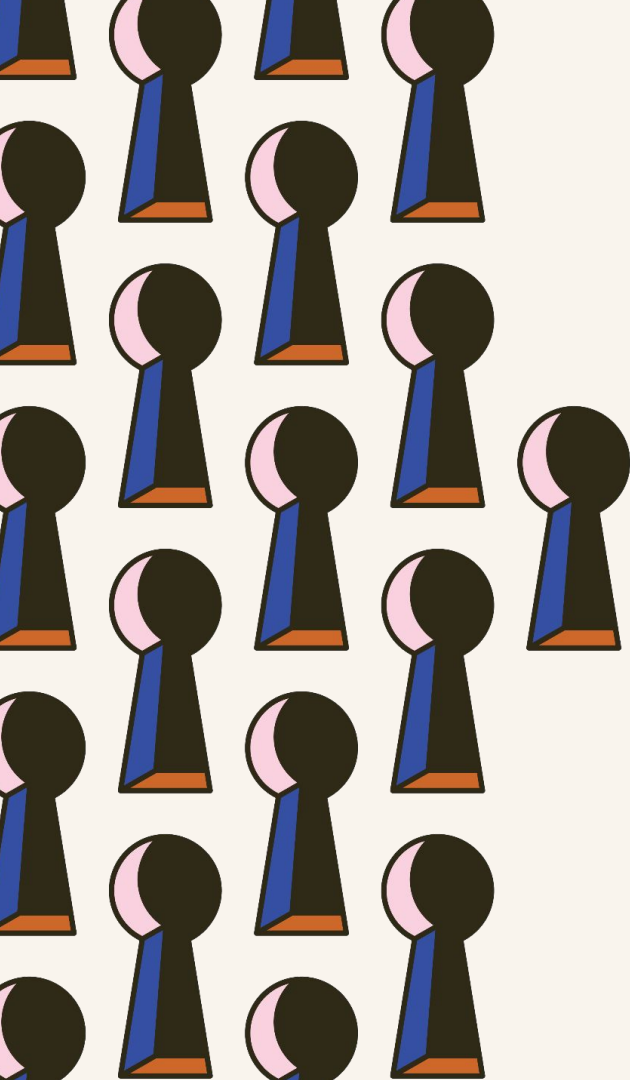
Proposal

???

Decision

Consent-Based Decision Making





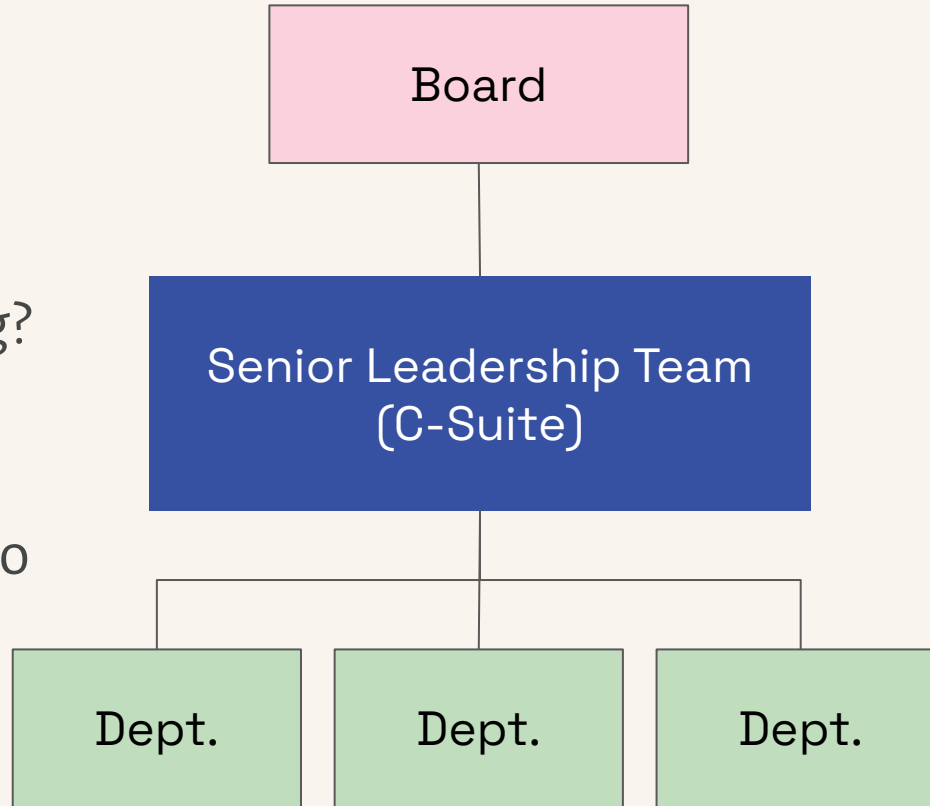
Circle Structures

Traditional Hierarchy



But who's
involved in
decision making?

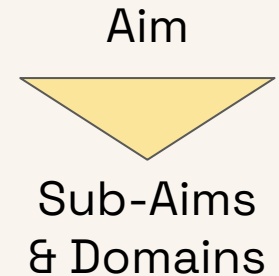
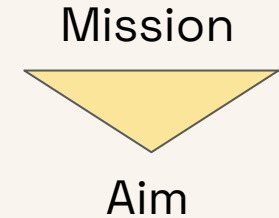
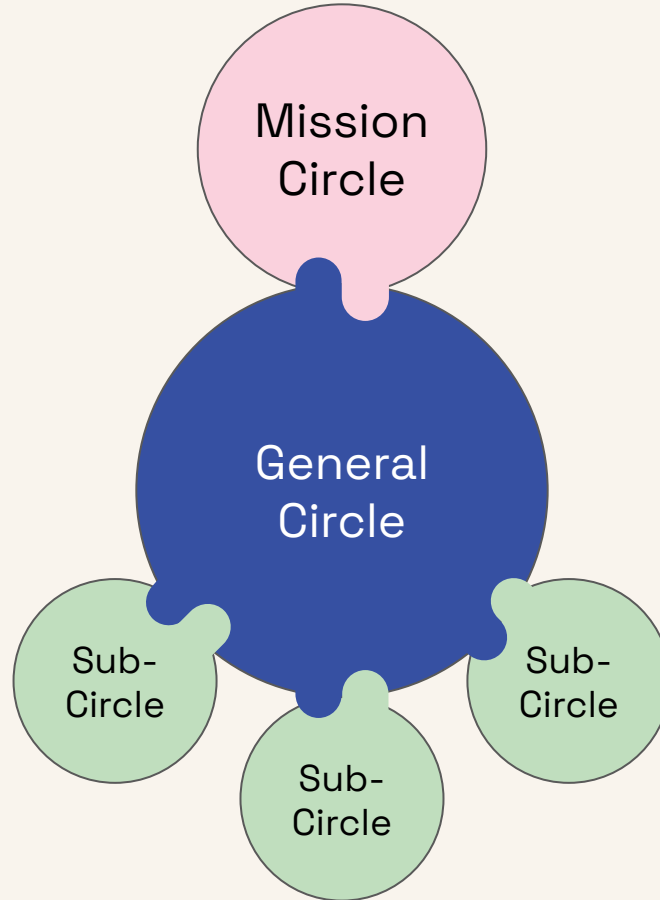
How do we get
from hierarchy to
sociocracy?



Circle Structures



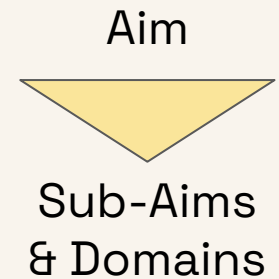
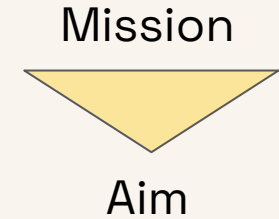
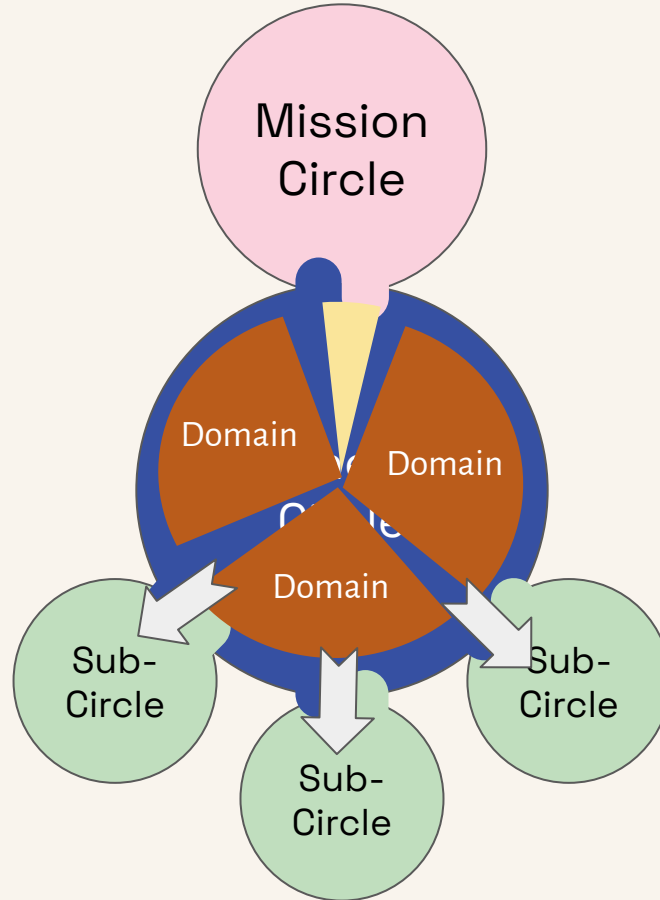
By replacing hierarchical models with interconnected circles with their own defined **Aims and Domains**.



Circle Structures



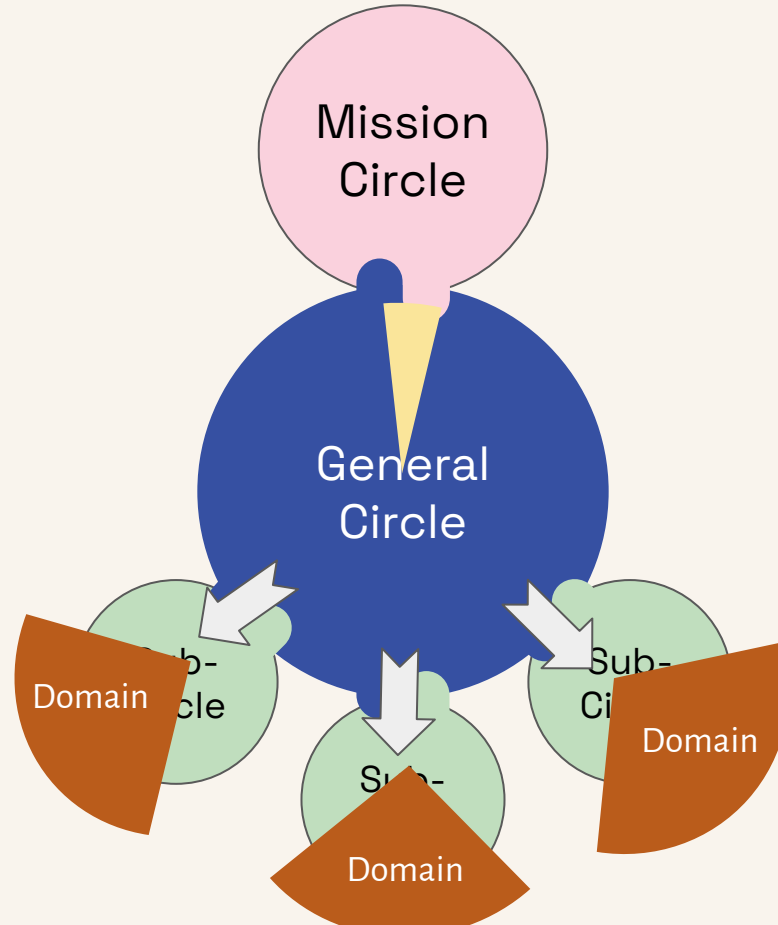
Instead of all power and decision-making authority being centralized in the General Circle...



Circle Structures



Decision-making power for certain domains is distributed into the sub-circles responsible for that domain.



Mission



Aim

Aim



Sub-Aims
& Domains



Sociocracy For All

Circle Structures, Aims & Domains

Domain:

- Liaise with suppliers
- Liaise with fulfillment services
- Quality control

Production

Aim: Oversee the production of physical products

Domain:

- Oversee the design of new products and design updates to existing products

Product

Development

Aim: Create engaging and education products to inspire deeper connection

Domain:

- Plan events and carry-out events
- Work with outreach circle to have the events promoted

Events

Aim: To create and deliver engaging events

Domain:

- HR
- Legal including copyright
- Taxes
- Bookkeeping

Finance & Legal

Aim: Manage financial and legal affairs

General circle

(alignment, between mission and operations,, flow of information)

Outreach Circle

Aim: Promote and share about offerings and opportunities for engagement

Domain:

- Creation of and execution on marketing strategy

Mission circle

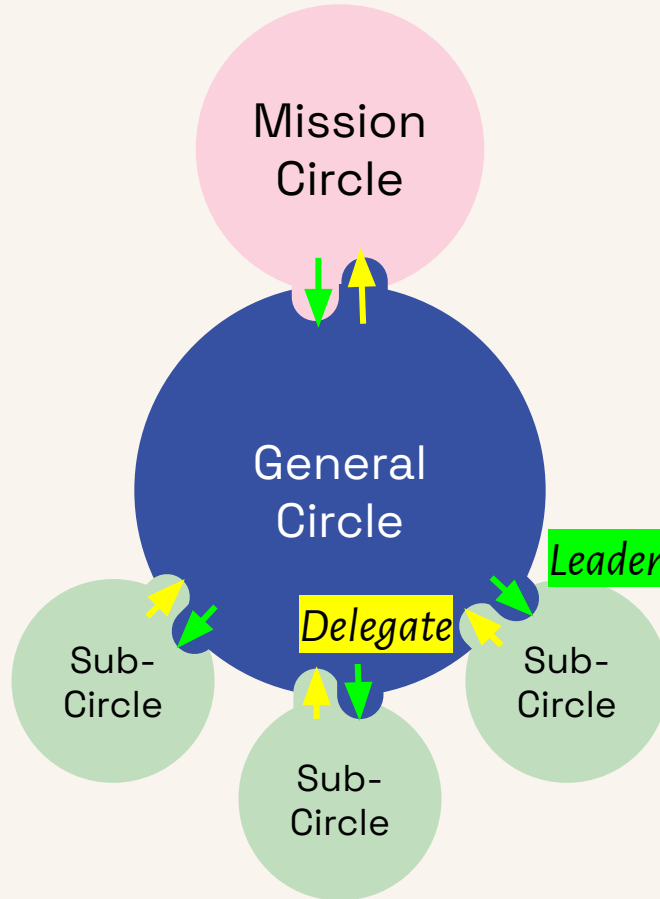
(alignment with mission/vision)

“Double Linking”



Each “Child circle” shares a Leader and a Delegate with the “Parent circle.”

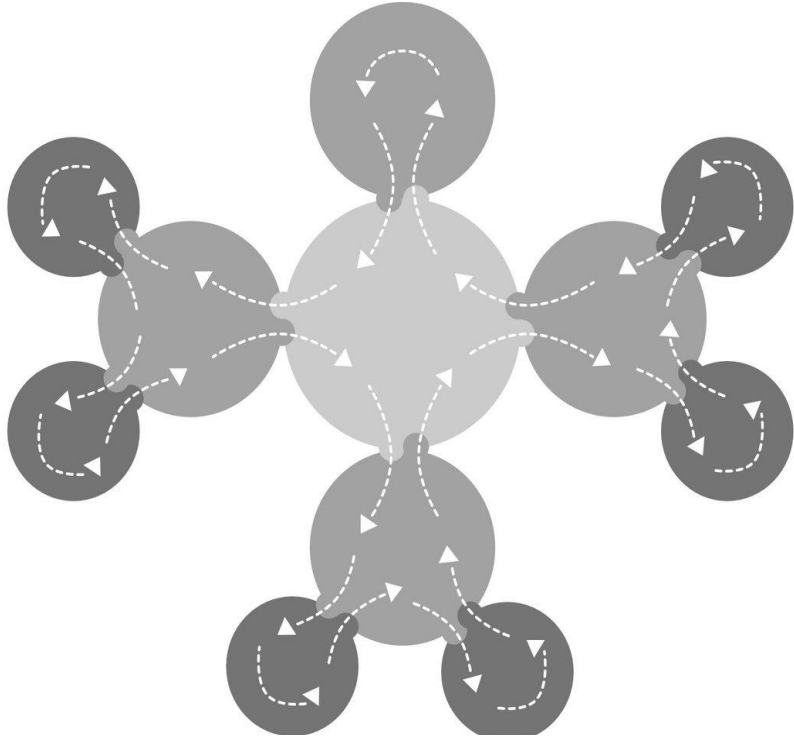
Leaders carry info from Parent to Child; Delegates carry info from Child to Parent.



This helps ensure information and decisions flow up and down effectively, and that at least 2 perspectives are shared.

Circle Roles

Who do you need in a circle?



Facilitator

- Facilitates circle meetings

Secretary

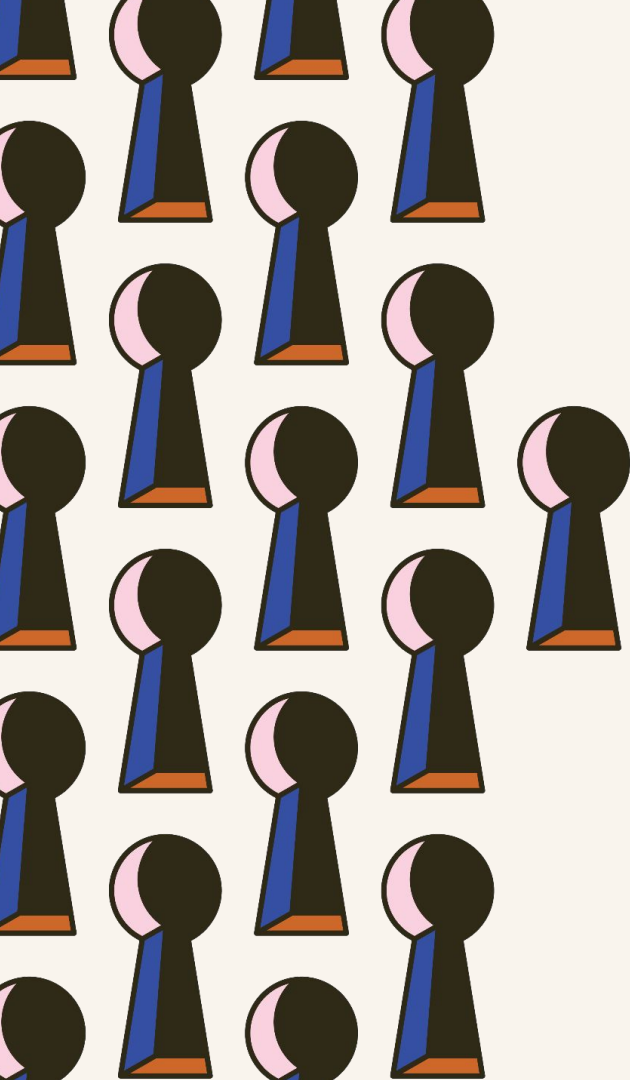
- Takes notes, takes care of circle documents and written records

Leader

- Oversees operations of the circle
- Carries information from the Parent circle into the Child circle

Delegate

- Carries information from the Child circle into the Parent circle

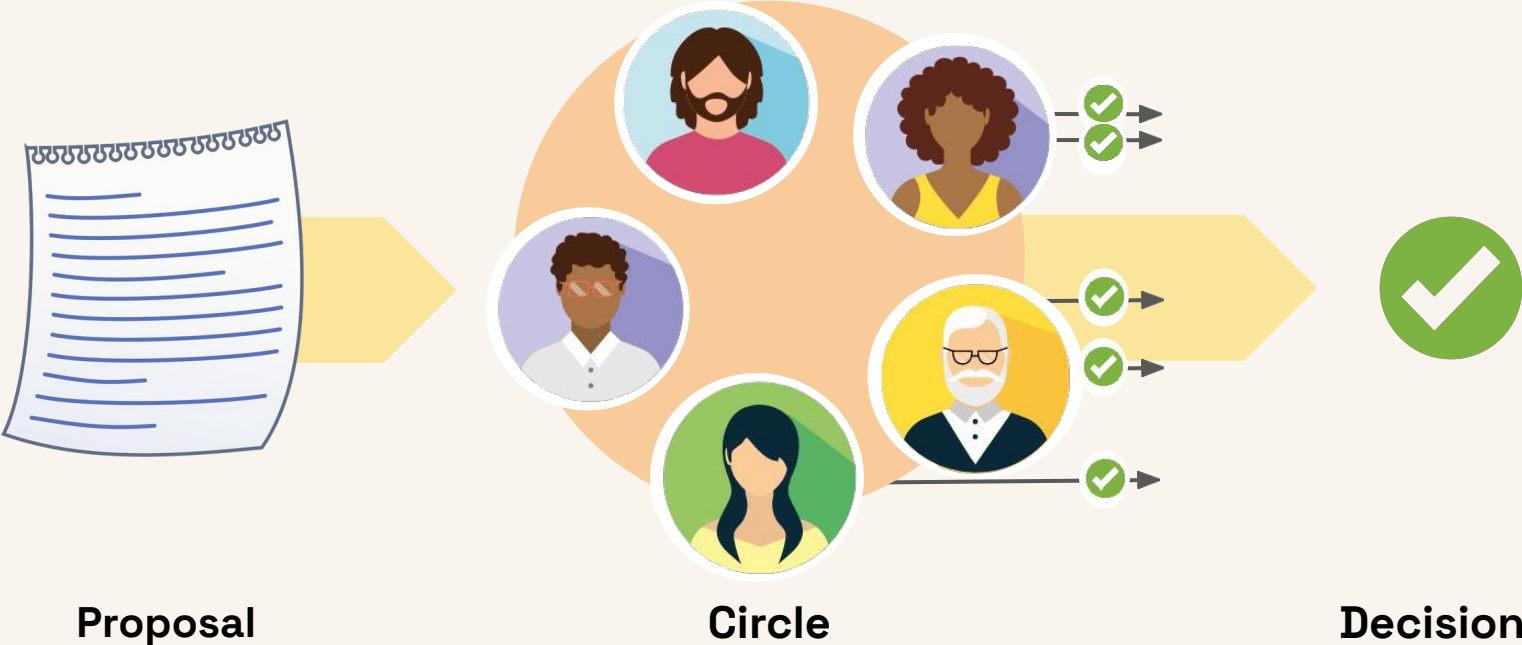


Consent-Based Decision Making

*In sociocracy, we make decision by **consent**.*

*The goal is to make **inclusive** decisions **fast**.*

Consent-Based Decision Making



Consent and Objections

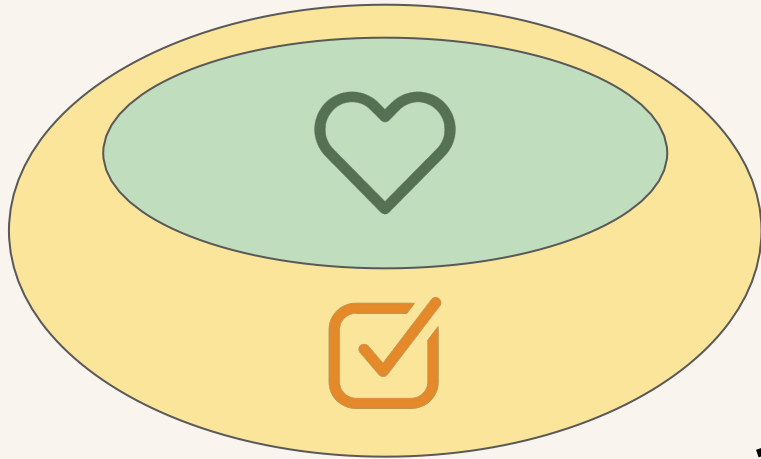


Proposal

Circle

Objection

Consent and Objections

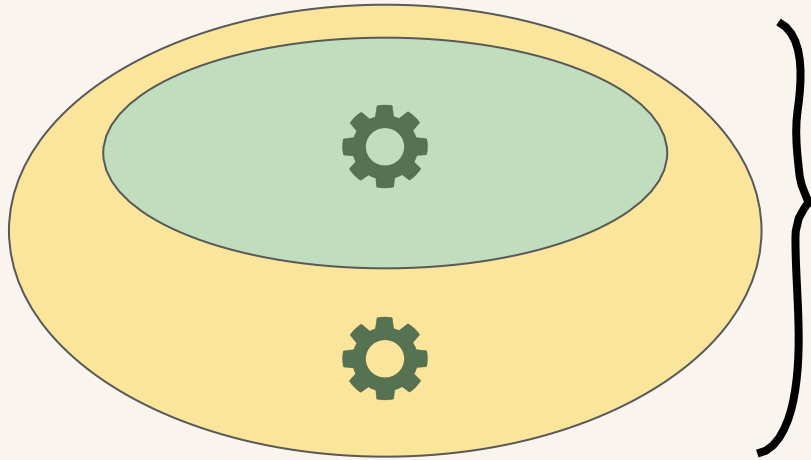


**Range of
Tolerance**

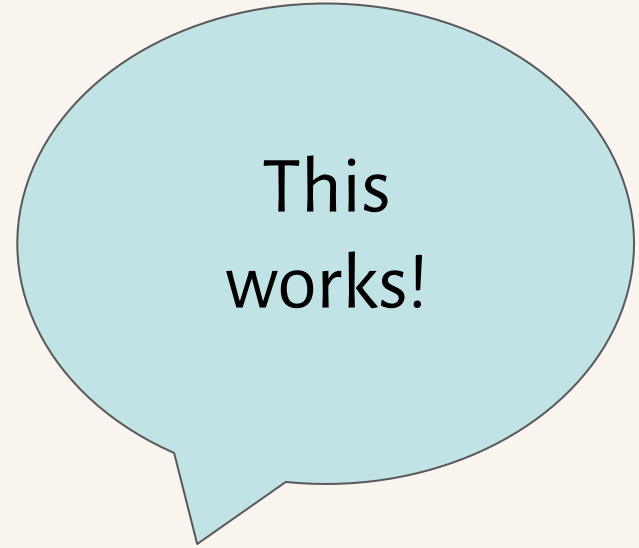
Perfect for me!

This works!

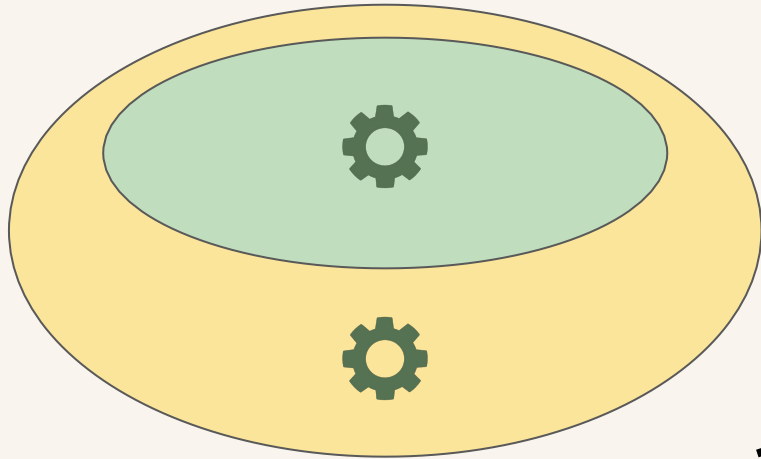
Consent and Objections



Consent



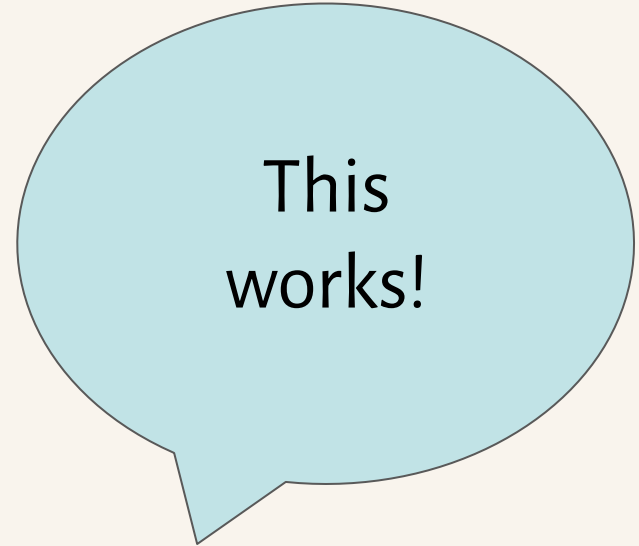
Consent and Objections



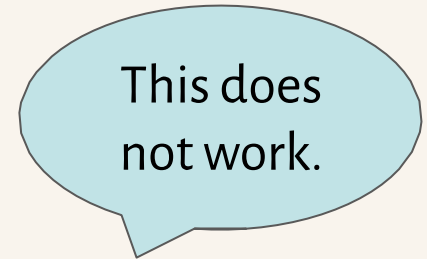
Consent



Objection



This works!



This does not work.

Consent and Objections



CONSENT

I think this proposal **helps us** reach our aim.

“I consent.”

=

“No objections.”

OBJECTION

I think this proposal **negatively impacts** how well we can reach our aim.

“I *don't* consent.”

=

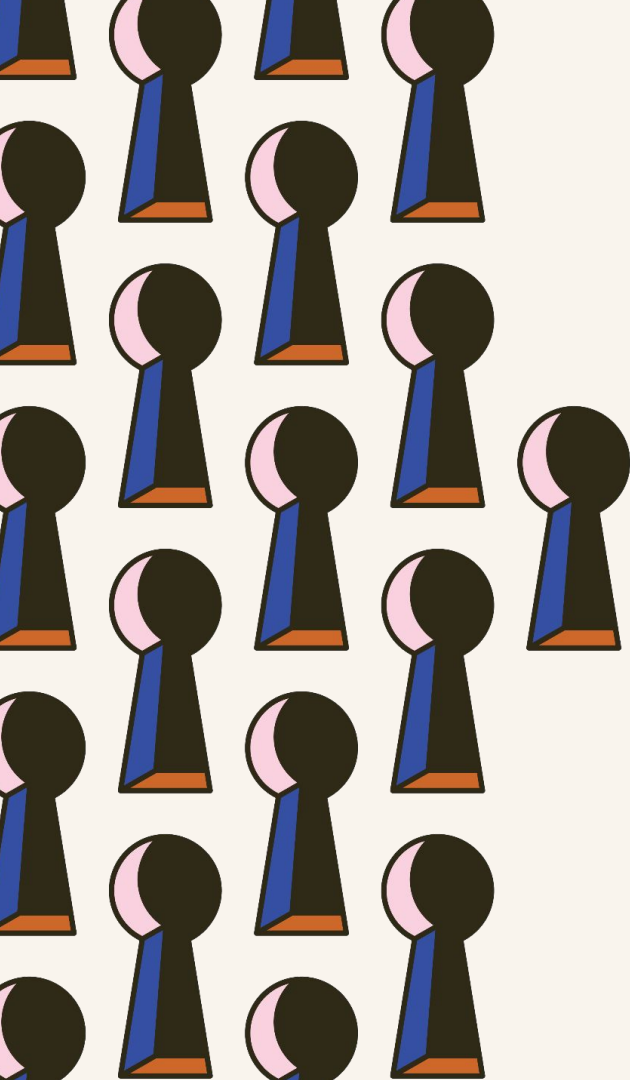
“I have an objection.”

What if I don't consent?



- 1) State your objection
- 2) The circle, together, tries to find ways to integrate the objection.
- 3) Strategies:
 - a) Modify the proposal
 - b) Shorten the term
 - c) Track the concern





Consent Process

A step-by-step **consent process** helps us make a decision **together** in an **orderly** way.

Consent Process Rounds



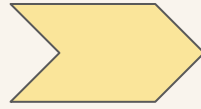
- 1) Facilitator calls on everyone in turn so everyone gets to speak
- 2) The facilitator goes in the middle – not first nor last
- 3) After you're done speaking, you say "check" to acknowledge your statement is complete
 - a) If the person forgets to say "check," the facilitator will ask, "Are you complete?"



Consent Process Rounds



Understanding the
Proposal



Clarifying
questions round

Explore Reactions
to the Proposal



Quick reactions
round

Decide on the
Proposal



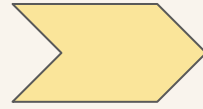
Consent round



Integrating Objections



Understanding the Proposal



Clarifying questions round

Explore Reactions to the Proposal



Quick reactions round

Decide on the Proposal

Consent round



Understand Objections

Amendment Ideas

New Proposal

Discussion style - not one by one like in a round



DEMO: Running a Café

Café Aim: running a café with healthy breakfast, snacks, and hot drinks

Infrastructure & Maintenance Circle Aim:

providing and maintaining the built environment of the café



Proposal: Increase the number of tables from 20 to 24 (and the number of chairs from 40 to 48)

Understand the Proposal

Clarifying Questions Round

Explore Reactions

Quick Reaction Round

Decide on the Proposal

Consent Round



ACTIVITY:

Consent Process

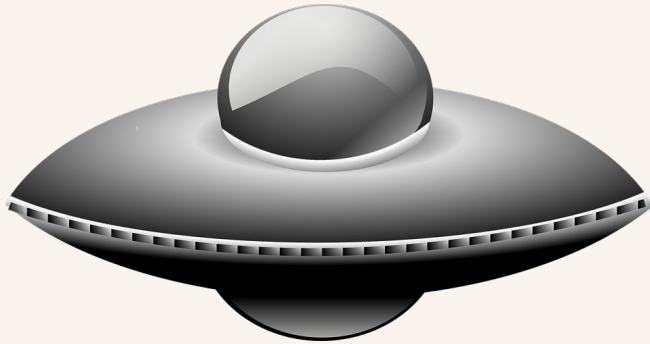
- 1) Break into small groups (3 or more)
- 2) Pick a “Facilitator”
- 3) Walk through the consent process

EXERCISE: Populating Mars



Organization Aim: populating Mars, with 120 people

Circle Aim: Entertaining the travelers during the 9 month flight to keep peace, health, and increase connection and confidence in the project.



Remember to say 'check' when you're done speaking!

Proposal: The circle is putting on a mandatory Soccer Mars Cup for everyone older than 11 years old.

Understand the Proposal

Clarifying Questions Round

Explore Reactions

Quick Reaction Round

Decide on the Proposal

Consent Round



REFLECTIONS / Q & A



Sociocracy helps orgs to:

- Distribute decision-making power more equitably & transparently
- Build trust by making decisions based on consent and explicitly incorporating objections
- Streamline decision making through clearly structured facilitation processes
- Foster greater collaboration and accountability through clear roles and better representation

How to apply this at home:

Your organization may not be ready to adopt sociocracy in full, but you can probably adopt a few new tricks like:

- Creating interconnected circles with clear aims and domains
- Sharing information between circles with delegates/leaders
- Using rounds and consent processes to facilitate meetings and decisions
- Integrating objections to ensure all voices are heard and balanced

Resources



- [Sociocracy for All Website \(SoFA\)](#)
- SoFA: [Comparison of decision-making methods](#)
- SoFA: [Consent process: decision-making in sociocracy](#)
- SoFA: [Strategies for integrating objections](#)
- SoFA Books:
 - [Many Voices, One Song: Shared Power with Sociocracy](#)
 - [Who Decides Who Decides?](#)
 - [Let's Decide Together! Practicing Sociocracy with Children](#)
 - [Collective Power: Patterns for a Self-Organized Future](#)



THANK YOU!

*Please remember to
complete the session
feedback survey!*



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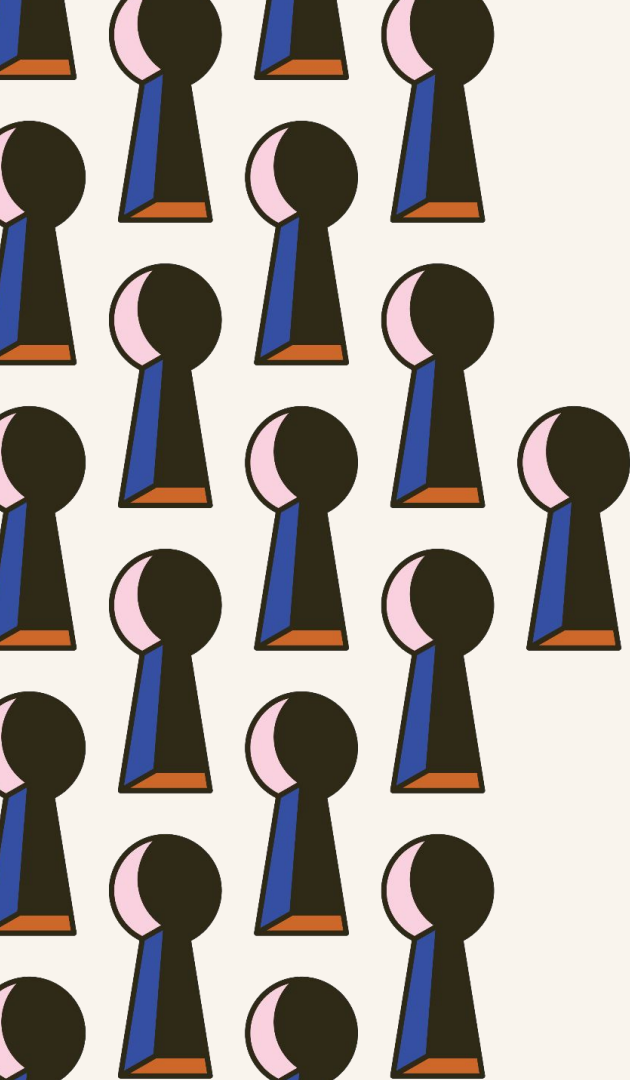
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Skelton Key Strategies



Appendix: Additional Samples

Sociocracy

a peer governance system based on consent



Circles = a trusted team of peers

Groups of 4-8 people work together with a defined purpose (aim) and with authority in their domain

Linking = connectors

Links between circles help align circles, help information flow and balance circles with each other

Decisions = consent

Circles set their agreements by consent - if a circle member has objection, the proposal needs to be improved



share information



Feedback

Build in feedback and increase information flow to make incremental improvements a habit.

decentralize power



Sociocracy For All
sociocracyforall.org



Decision-Making Methods

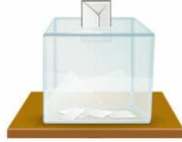


Sociocracy For All
sociocracyforall.org



Autocracy

(Examples: some corporate businesses, administration)



Democracy

(Examples: nonprofit boards, some cooperatives)



No governance system

(Examples: forming groups, unformalized and informal groups,



Whole-group consensus

(Examples: nonprofit boards, some cooperatives)



Sociocracy

(for-profits, schools, nonprofits, cooperatives, communities)

How do we decide?

by authority

whoever is in power makes decisions; also has the power to override the decisions of others on lower levels

by voting & authority

(the most common form is simple majority vote where one needs >50% of the votes to win)

unclear

groups default to whatever is the norm in their culture; choice of method is often emotionally charged

by consensus

(a decision is made when everyone agrees)

by consent & authority

consent: a decision is made when there is no objection
people with mandate can make certain decisions

Who decides?

top-down

whoever is higher in the chain decides. includes overriding of decisions lower in the chain.

voting members

members of decision-making body representative who gets authority; those elected have defined authority

unclear

often, some people emerge whose voice will have more influence; than others; there is no way to challenge

members

all members decide together

circles + roles

decision-making is distributed into circles who make autonomous decisions. People in roles are authorized to make decisions

Strengths

fast decisions

easy to scale with large number of people

flexibility (only for forming groups)

**everyone included
lots of ideas heard**

**many voices heard
fast decisions
trust & listening in teams
clarity**

Challenges?

**lack of feedback
lack of participation
and choice**

**topics get politicized
tyranny of the majority**

**lack of clarity & feedback
abuse of power likely
hard to formalize later**

**hard to make changes
tyranny of the minority**

needs commitment to process and learning

Vision, Mission, & Aims



- **Vision** sets out the world we'd like to see, and many vision statements take the format of 'we believe in a world ...'
- **Mission** tells us what the organization does to bring about that world. To quote a 2021 SoFA student, *"Our mission is what we work towards, what we see in the sunset, email to our funders, and preach in the streets. It is our shared purpose, what we are there to do, and what the whole organization works towards achieving"*.
- **Aim(s)** tell us the specifics of how the Mission will be achieved. Aims should be tangible and measurable.

Vision, Mission, & Aims Examples ---

- **Vision:** A world in which people engage together to meet their individual and collective needs in an equitable way, with respect for all living beings.
- **Mission:** To promote sociocracy locally and globally as a sustainable way of governance.
- **Aim:** Sharing sociocracy by generating communities of practice and innovating by making decisions together, sharing what we learn, and inspiring each other through accessible and transferable materials, training, and resources.
- **Sub-aims:**
 - Spreading sociocracy with accessible, educational and inspirational materials about sociocracy (articles, videos, webinars, social media) and through training and consulting. (Content Circles)
 - Networking and supporting the sociocracy world, including SoFA members, sociocratic practitioners and promoters, and regional and language-oriented groups. (Ecosystem and International Circles)
 - Providing SoFA infrastructure and administrative systems so that there is ease in running the organization. (Membership Circles)

Circle	General aim	Domains	Membership/ Roles
Advocacy	<i>“Advocating for youth decision making power in every space where decisions about young people are made”</i>	What campaigns to support and how to support them	Members active in operations
Community	<i>“Weaving community to foster relationships so that we can all work together”</i>	<ul style="list-style-type: none"> ● Partnerships Policies and Processes ● Membership Policies and Processes ● Accountability Policies ● Community events 	Members active in operations
Business	<i>“Mobilizing resources so that youth-led collective impact efforts can be equitable, sustainable, and impactful”</i>	<ul style="list-style-type: none"> ● Budget ● Grant Applications ● Fundraising ● Finances 	Members active in operations Bookkeeper
General Circle	“Supporting youth-led collective impact efforts for systems change.”	<p>Anything and everything that’s not being held by another circle:</p> <p>Internal Communications</p> <p>Leadership Development</p> <p>Aims and domains of department circles/general circle subcircles (deciding who decides) - with consent from those circles</p> <p>Logbook keeping</p>	<p>Double-links (Lead and delegates) of department circles and mission circle</p> <p>Operational Roles: Internal Comms Leadership Development</p>
Mission Circle	Holding the organization true to its <u>mission</u> : <i>“To build a movement for youth-led collective impact.”</i>	<ul style="list-style-type: none"> ● Vision Statement, Mission Statement ● Definition of the 7Cs of Collective Impact ● Values ● Governance Agreement ● Impact Measures 	Youth Executive Director (General Circle lead) Adult Executive Director Delegates of Mission Partners