



SEOC

Sociocracy 3.0
Empowering Organisational Capacity

MANUAL SEOC

Facilitators Learning Journey &
How to organize S3 courses

[I. WHAT IS THIS DOCUMENT ABOUT?](#)

[II. INTRODUCTION](#)

[III. HOW ARE SEOC S3 INTRODUCTION WORKSHOP ORGANIZED?](#)

[II. MANUAL FOR FACILITATORS IN TRAINING IN S3](#)

[III. TEACHING MATERIALS](#)

[IV. SEOC RELEVANT INFORMATION](#)

I. WHAT IS THIS DOCUMENT ABOUT?

The present Manual is a support material for the setting up and running of introductory trainings in Sociocracy 3.0 by compiling together proven best practices.

The Sociocracy Empowering Organizational Capacity (SEOC) project uses adult education to professionalize staff and trainers and enable them to support the activity of Citizen Initiative Groups active throughout Europe, working for sustainable grassroots solutions for social, economical and environmental challenges.

Adult learners will be training in Sociocracy 3.0 (S3) and use it to establish effective governance in organizations, companies, institutions and informal initiative groups inside and outside of the partnership.



Co-funded by the
Erasmus+ Programme
of the European Union

This project has received funding from the European Union's Erasmus+ Programme under Grant Agreement No. 2015-1-RO01-KA204 (Sociocracy Empowering Organizational Capacity).

The contents of this material are the sole responsibility of SEOC and can in no way be taken to reflect the views of the European Union.

II. INTRODUCTION

A. Sociocracy 3.0 (S3)

S3 is a framework for evolving effective, resilient and agile organizations. It functions as a collection of many modular (but mutually reinforcing) patterns and practices for all aspects of steering and evolving organizations.

The approach of S3 is to meet organizations where they are and support them in continuously improving products and services through a painless and iterative approach, and at their own pace by helping organizations make the best use of the talent already present, and enabling them to grow structures for effective collaboration.

[www. Sociocracy30.org](http://www.Sociocracy30.org)

B. Learning path

Intro: this is about how to explore and deepen the knowledge on S3, practice and implement, connect with the S3 INT CoP and act as facilitator/consultant in S3.

➤ Take part in a presentation about S3

- An S3 presentation is the perfect opportunity to get in touch with S3 and have a first picture of what it is about and what aspects are touched through applying it. This is also a space where you can meet others that are interested, enthusiasts about S3, and have a contact with facilitators or mentors. To find out about the next S3 event, consult the S3 INT CoP

event database or get in touch via sociocracy30.intranzitie.org to set up one.

➤ **Study the online learning resources on sociocracy30.org and other sources**

- Internet, at this stage, holds a big variety of resources. Study in depth the sociocracy30.org and the L.O.V.R. knowledge database is a adequate step to deepen theoretical knowledge.

➤ **Visit or contact an organization using S3**

- In the end of 2016 a variety of organizations (from small to very large scale) around the globe are pulling in S3 patterns. Get in touch with these organizations to see in practice how it “looks like” to apply S3 and how these organizations are using it. For a list of organizations contact the SEOC team.

➤ **Attend an online learning group**

- Online learning groups are groups that form around an S3 topic with a driver to deepen the knowledge and give mutual support in practice. Visit the Sociocracy 3.0 International community of Practice Facebook page or the SEOC Facebook page to find out more about the active online learning groups.

➤ **Set up an online learning group on your S3 topic of interest**

- Connecting with the online learning community of S3 might bring you different questions and the wish to deepen new topics. You can always set up an online group based on a specific topic of interest.

➤ **SEOC S3 Introduction Course**

- S3 Introductory Courses are between 3 to 4 days, representing a minimum of 19 hours and an optimum setting of 35 hours of facilitated contact with S3 facilitators. In such a course you will get a clear picture of the main S3 patterns and get to practice the most relevant. You would also have access to printed materials, namely the S3 Introduction Manual. To organize an S3 introduction course in your area, consult the sociocracy 3.0 International Community of Practice group on Facebook to engage with trainers and facilitators.

➤ **Offer presentations of S3**

- Offering a presentation about S3 is a great opportunity to get in touch with other enthusiasts and practitioners exploring various organizational frameworks. It is also a great opportunity for knowledge transfer and discovery. These inquiries help to better understand and respond to the challenges of implementing S3 patterns within an organization.

➤ **Start experimenting with S3 in an organization**

- Do you have a project? In a team part of a project? Work in an organization? Or are you close to any of the above? You have the right conditions to innovate and experiment with S3 in a real, concrete environment. This is a very precious space where you can learn by doing, sense, feel and see in practice the potential of S3 unfolding.

➤ **Set up or join an S3 practice group for an extended period and gain consistency in application**

- The practice groups or S3 communities of practice are the space where S3 practitioners meet and exchange knowledge, pattern discoveries and improvements. Join or set-up one in order to gain consistency in application and peer review in the work that you are doing.

➤ **SEOC S3 Deepening Course**

- SEOC Deepening Courses run for 5 days courses, 40 hours of direct facilitated contact with S3. These courses are designed to offer the participants an integral view of what is S3, how it can be applied and sufficient space to approach concrete aspects/steps of S3 implementation in order to enable the ability to take it practically to the organization/projects that they represent.

➤ **SEOC S3 Facilitators Training Course**

- The SEOC S3 Facilitators Training Course is a 7 days course, 60 hours of direct contact brings the basics of S3 and the right tools to facilitate S3 application in an organizational environment. It contributes with insights and a facilitators-view, know-how and built-up experience.

➤ **Use S3 patterns in different contexts of your life**

- S3 is just as much a process of cultural transformation as it is a framework of patterns for collaboration. To achieve proficiency it is necessary to be able to embody the S3 principles and change behavioural patterns. Applying it in daily life is a challenge that can bring impressive benefits in relationships and overall life needs.

➤ **Contribute to the improvement and development of the S3 Patterns**

- With practice, insight on the workings of different S3 patterns are gained. Continuous improvement of patterns and the discovery of new ones are key to the evolution of S3. Along with contributing value to S3 this is one of the best ways to grasp the inner workings of S3 and understand the subtle aspects of application and facilitation.

➤ **Join the facilitation team for an SEOC S3 course and receive mentoring from a trainer with more experience**

- In some of the courses there is the possibility for facilitators in training to join and support by leading practice groups with participants and occasionally also teaching S3 patterns. Contact trainers to find out about such opportunities.
- Organizing an S3 event and inviting a more experienced trainer is a great way to receive feedback and coaching and gain fluency in teaching and facilitating.

➤ **Join an SEOC SEOC S3 team of facilitators and consultants**

- Working in a team of facilitators and consultants offering training and implementation support services to clients from different fields is an advanced learning environment and a professional engagement with S3. Enquire in the S3 international community for opportunities to join or form such a team.

Note: the learning path described above is non-linear. You might find yourself in a situation where you can attend multiple S3 workshops and in an environment where you can practice experiment and rapidly learn. This combined with your existing experience and personal drivers might mean you quickly evolve your skills as a facilitator and teacher of S3. Take the description above as a picture of the learning landscape in S3 and the way this can be approached and cultivated.

C. Organizational development and S3

What is organizational development?

Successful organizations are those that perform well in rapidly changing and complex environments through organizational learning, knowledge management and transformation of norms and values. This requires focus on evolving structures, strategies and processes that influence behavior and motivation and on improving the capacity of an organization to identify problems, plan actions, negotiate change and evaluate its progress.

The art of collaboration

SEOC S3 is embed in the emerging organizational paradigm. From Frederic Laloux book “Reinventing Organisations” (ISBN-10: 2960133501) strong examples of small and big organisations experimenting with organisational capacitation in a more collaborative way, exploring and forging a path of collaboration is renewing emergence, showing a growing will of cultural change within human work spaces and organisations, having strong implication in the access to power, decision making processes, creativity and innovation.

D. Facilitation and consultancy in S3

Who is facilitated and offered consultancy?

S3 is offered to any group of individuals affected to a project or members of a organization that wants to engage or deepen in the field of collaboration with a strong call to call towards emergence, collective intelligence, decision making processes, shared power and organisational cultural change.

Peer review and SEOC S3 Community of Practice

Peer review is central in the maturing process of facilitation and consultancy. For this to happen, keep quality levels elevated and promote a active learning environment and exchange in between practitioners, facilitators and consultants, SEOC S3 is

recommending that no act of facilitation or consultancy should be delivered with no peer assistance.

E. SEOC Sociocracy 3.0 International Community of Practice

General Agreements

No certification

Transparent contracting with clients

Peer review and endorsement from the S3 community of practice

Continuous improvements of the patterns by the SEOC S3

Community of Practice

III. HOW ARE SEOC S3 INTRODUCTION WORKSHOP ORGANIZED?

- a. Intro
- b. What is S3 about?
- c. Logistical information
 - i. Duration and Workshop structure
 - ii. Schedule
 - iii. Workshop fee
 - iv. Accommodation fee
 - v. Important info
 - vi. Number of participants
 - vii. Contact person
- d. Details for the organizer
 - i. Commitment
 - ii. Exchange
 - iii. Organizers tasks
 - iv. Materials needed
 - v. Workshop space
 - vi. Meals
- e. Info about the facilitators
- f. Testimonials

A. Intro

“How to organize a S3 Introduction Workshop” is meant to serve everyone that had a encounter with S3 and holds a tension in how S3 can: get to more individuals and organisation, bring S3 in the organisation that they are active, support the S3 spread around the world.

Below several chapters of important information will support anyone into this dynamic of “how to organize a S3 introduction workshop?”

B. What is S3 about?

S3 is a governance framework for evolving effective, resilient and agile organizations. It functions as a collection of many modular (but mutually reinforcing) patterns and practices for all aspects of steering and evolving organizations.

S3 introductions serve participants to learn to use the basics of the framework so as to be able to pull in patterns and facilitate their usage on a basic level in their organizations.

C. Logistical information

The info below describes at large, the specific needs of how to organize a S3 Intro workshop. This might vary from cultural, geographical and organizational perspective. Always feel free to take this information as a support and adapt it to your specific conditions. Do it always in collaboration with the facilitators and always come back with learnings and possible improvements. This is a living document.

I. Duration and Workshop structure

The options that best work and the International S3 Community of Practice recommend is four days format. The recommended days of the week would be from Thursday to Sunday, except if the organiser is a company and prefer to use the weekdays.

The experience is telling demonstrating that in some cases, according with the organisational culture, 3 days workshops can be enough to have a Introductory experience in S3. This solutions are tailor made, and should be evaluated accordingly.

II. Schedule

General training recommended rhythm:

- 8.00 Breakfast
- 9.00 -13.00 Morning session
- 13.00 Lunch break
- 14.00 -18.00 Afternoon session
- 18.00 Dinner break
- 19.30 -22.00 Optional evening session with offerings from the participants

There is a tendency to fill empty spaces from the trainers or to make it in a shorter time with training session in the evening. From previous experiences this is not a efficient option, taking to spaces of new-information-intake exhaustion and inability to integrate.

III. Workshop fee

Workshop fee has a composition of: NNNNNNNNNNNNNNNN

For couples that are coming together, there is a 10% reduction of the price

Trainers will offer subsidised places based on applications which will be evaluated by the organisers and themselves.

For under 25 years old participants it is recommended the option of an 'early bird' discount.

IV. Accommodation fee

Previous experience evaluates positively a four days residential workshop.

If this is your case, always find a place with easy access, enough open/green space, a comfortable seminar room, and a relatively balanced price. The suggested price for accommodation and food for a 4 days workshop should be under 200 EUR. Of course this depends on context and the beneficiary group.

V. Important info

The S3 events are alcohol-free and drugs-free trainings.
Please inform accordingly.

VI. Number of participants

S3 Introduction Workshops are quite flexible in number of participants depending on the number of facilitators and their skill level.

Nevertheless we can set some frames as follows:

A minimum number of participants is 16.

As group size:

1. small group: from 16-24 participants
2. ideal group size: 25-35 participants
3. big group size: 40-45 participants

Any numbers beyond the superior limit should have immediate implications on the numbers of facilitators.

VII. Contact person

Be clear on who is the contact person from the facilitator side. Name, telephone, e-mail, Skype and some SM contacts should be provided. This info is only for the use of the organisers.

Also, inform the participants on who is the contact person from organisation side. This info should be present in all the information material of the training.

D. Details for the organizer

I. Commitment

Organizing a event needs dedication time and will to make it happen. To engage in organizing a S3 event, requires even more dedication and enthusiasm.

From previous experience it is recommended that the team has clear arrangements specifically on the topic of commitment and time application for this task.

II. Exchange

Attending the event as a gift for the effort of organizing. The organization group are welcome to indicate individuals that can attend the event tuition-fee-free accordingly with the scale below.

For a:

1. small group (from 16-24 participants), one
2. ideal group size: 25-35 participants, two
3. big group size: 40-45 participants, three.

The organizer can take the decision to spread this opportunity among a larger number of participants involved in the organization lowering the fees of the individuals part of the organization. This is a opportunity and a internal arrangement.

III. Organizers tasks

Find the right venue.

Make arrangements with the venue and keep the communication alive

Organisation of Workshop space

Organisation of the food preparation

Communication of the event, logistics, enrollments and payments management.

Taking care of emitting recipes or invoices (if requested) to the participants

Keep the communication alive with the facilitators.

IV. Materials needed

The material needed for the facilitation are:

Around 60 Flipchart papers

6 different colors markers, 2 of each.

Post-its: 4 different colour blocks, 2 of each.

A4 paper

Pencils for the participants.

Printed S3 Intro essentials manual.

V. Workshop space

We strongly recommend residential workshops, where the participants can spend overnight and share experiences and create a stronger sense of bonding and relation.

Regarding workshop space: a closed space where it can get loud for some exercises or after-program dancing or any other program. One bigger seminar room where everyone can sit in a circle or 2 concentric circles. This room should preferably free walls where flipcharts could be posted and kept visible.

Sleeping rooms and bath for participants.

Kitchen and dining room

VI. Meals

Vegetarian/vegan food is the suggested option.

We also suggest to do not include during the workshop any alcoholic drinks in the menu.

We strongly recommend organic, local and seasonal food always when possible.

E. Info about the facilitators

As a good practice in S3 (see double linking pattern), the participation of two facilitators is recommended. As organizer you should have a short bio from each, on time in order to be included in the event communication.

The info should include: name, surname, short personal statement of what is deeply moving in their life at this point (gifts, service to the world), relationship with S3 and the passion of facilitating S3. Other information like languages, locations, personal projects might be interesting to have them present and a plus.

F. Testimonials

Including testimonials in the communication always help to spread the word and support possible participants in taking a decision. Please contact the facilitators or your closest S3 community in order to have access to them if you have none yet.

II. MANUAL FOR FACILITATORS IN TRAINING IN S3

1. Facilitating S3
2. Role description for the facilitator in training
3. Ingredients for adequate role accomplishment
4. Important aspects
5. Community of practice for facilitators in Training.

1. Facilitating S3

In S3 using facilitators is a pattern that a group can pull in to address needs. This is a specific role that supports groups to be effective and fluent in using S3 patterns. The capacity to facilitate is however a resource of any group and is crucial to using collective intelligence.

A facilitator is not responsible for the outcome of processes more than any of the other circle members. She or he has the same power to raise objection and make proposals.

Facilitation requires understanding of patterns and fluency in the concepts of S3 as well as the ability to moderate interactions and stick to the process. It is a strong practice of embodying the principles of S3 as well as the values of the particular group.

2. Role description for the facilitator in training

Driver for the Role

Using, teaching and implementing S3 often relies on facilitators which need to become fluent in the framework and able to navigate the different complex situations that can arise during cultural transformation.

Key Responsibilities

- Be transparent and contract with groups as a facilitator in training in a specific stage in the learning journey.
- Offer services through, presentations, consulting, facilitating and teaching in accordance to the level of proficiency
- Ask for feedback from beneficiaries ask for mentoring and feedback from peers and more established facilitators

- Assume the personal learning journey by attending or assisting trainings, learning groups, studying, engaging in research programs and contribute to the evolution of S3 with feedback and ideas

Abilities, Skills, Experience

A facilitator in training is somebody who at the very least has experienced S3 in practice (in a functioning way) and has engaged with it in a learning journey preferably by attending an intro or better yet a facilitators training course.

The understanding of S3 as a framework, of the patterns and the reasons why different aspects work is essential and should be consolidated with practice.

The ability to ask for, receive and integrate feedback and coaching is crucial as well as a commitment to practice embodying the S3 principles and use patterns of the framework in one's own life and work contexts.

Any facilitation skills and good communication skills as well as understanding of group dynamics, organizational development and culture and the psychology of human interaction are important advantages.

Knowledge and experience of different facilitation tools, methods for organizing work and working groups, dealing with conflict and tension and supporting personal and collective change processes are important additional assets.

Time requirement

A learning journey in S3 is self designed and there is no certification to determine completion instead peer reviews and endorsements from collaborators and clients are what support the constant learning and improvement.

However an investment in attending courses and having a regular practice in application are crucial for real development. In fact direct application after attending courses is essential and a commitment for anywhere between several months to a couple of years is needed to really experiences S3 in reality.

Term

It is self defined and personally assumed. Meaning that a facilitator in training will decide when they want to increase the complexity of their learning path and also when they want to invite the review of the community of practitioners to determine their perceived level of proficiency.

Frequency of Evaluation

To be decided with the groups to whom services are being offered, with peers, mentors and other teams.

It is suggested to request feedback after every instance of using S3 and facilitating, presenting or teaching S3 and even when facilitating or working together without explicitly employing S3.

Evaluation criteria

- Knowledge and Effective usage of patterns
- Understanding and embodiment of principles
- Accuracy and clarity in explaining or teach S3 (as a framework or individual patterns)
- Capacity to facilitate processes
- Skill in navigating via tension and supporting group ownership and collective intelligence to emerge

→ Engagement with beneficiaries, peers and mentors

3. Important aspects

Self evaluation.

Although feedback is an essential aspect for development the responsibility for designing and adapting the learning journey rests with the facilitator in training.

Transparency.

- Towards clients and beneficiaries about the stage in the learning journey.
- Towards the S3 international community of practice about concerns or objections to any aspects of the functioning of the community or S3 itself. Also about feedback received and financial benefits.

Initiative and responsibility about creating one's own learning journey.

Every practice space counts and the best way to have sufficient practice in facilitating, teaching and implementing is to set them up yourself and take care of your learning needs. Give presentations, organize workshops, invite the collaboration of other facilitators and facilitators in training, offer support to groups and invite people in organizations you are part of to experiment and use S3, set up or join online learning groups, ask for coaching and mentoring and engage in the international community of practice and S3 related projects.

4. Community of practice for facilitators in training.

There are several online channels where facilitators in training and other practitioners of S3 are exchanging ideas, supporting each other and networking. They are also

providing inputs and feedback on S3 as a framework as well as patterns that it includes, its application, implementation and different methods, tools and concepts that can be compatible with it.

<http://sociocracy30.org>

<https://www.facebook.com/groups/956341357816417/>

<http://sociocracy30.intranzitie.org/>

<https://www.facebook.com/sociocracy30>

III. TEACHING MATERIALS

1. Presentations

<http://sociocracy30.org/>

2. Flip charts

<https://www.dropbox.com/s/81rnu1b3gi1rzin/161201%20Generic%20Flipcharts.pdf?dl=0>

3. Illustrations

<http://sociocracy30.intranzitie.org/library-of-open-virtual-resources-lovr/>

4. Online resources

<http://sociocracy30.intranzitie.org/library-of-open-virtual-resources-lovr/>

<http://sociocracy30.org/>

IV. SEOC RELEVANT INFORMATION

Sociocracy has proven to be effective for many organizations around the world, but it has yet to become viral. In 2014, the Sociocracy Movement formed with the mission to make sociocracy available to as many organizations as possible through the creation of Sociocracy 3.0., a free and open version of sociocracy integrated with lean and agile thinking.

SEOC - S3 Empowering Organizational Capacity exists as a project as a means to further the accessibility to sociocracy 3.0 in terms of learning materials, facilitators and support structures.

A number of materials were created as part of SEOC and will be openly available and disseminated to the general public but the greater aim of the project is to encourage the development of the S3 international community of practitioners which in turn would provide in time an even greater volume of openly accessible online learning materials, training opportunities, consulting services and research programs.

To get in touch, support or collaborate with the SEOC project team or any of the partners please use the contact details provided on the website:

<http://sociocracy30.intranzitie.org/partners/>



SEOC

Sociocracy 3.0
Empowering Organisational Capacity

ART – Asociația România în Tranzitie
RIE – Red Iberica de Ecoaldeas
RIVE Italian Ecovillage Network
UVT - Universitatea de Vest din Timișoara



Co-funded by the
Erasmus+ Programme
of the European Union

Erasmus+ This project has received funding from the European Union's Erasmus+ Programme under Grant Agreement No. 2015-1-RO01-KA204 (Sociocracy Empowering Organizational Capacity).

The contents of this material are the sole responsibility of SEOC and can in no way be taken to reflect the views of the European Union.