Sociocratic Circle Meeting Facilitator Handbook

The Way of Community

www.wayofcommunity.net

USA +1 720 263 1496

EU +43 650 290 1759

Sociocratic Circle Meeting
Facilitator Handbook

Table of Contents

Table of Updates

Date	Version	Notes
October 14, 2014	1.0	Original
March 5, 2015	2.0	Revision for consistency of language
April 27, 2016	2.1	Revision for consistency of language
May 10, 2017	3.0	Revision for clarity and consistency of language. Additional content.
May 5, 2019	3.1	Revision for change of business name
October 8, 2019	3.2	Revision for change of phone numbers

Sociocratic Circle Meeting
Facilitator Handbook

Section 1: Organizational Structure, Decision Making and Leadership

1.0 Objectives

- 1.0.1 Identify different organizational structures commonly used to get things done, make decisions, and contribute to connection and equivalent participation
- 1.0.2 Describe organizational leadership in terms of shared power and Aim Realization
- 1.0.3 Identify the elements of a Circular Hierarchy that contribute to shared power

1.1 Organizational Structures: Organizational structures exist in order to get things done, or in other words to produce outcomes or realize a common aim. When there is no shared purpose, common aim, or desired outcome, there is no need for the organization. People form organizations to do things they can't do alone.

1.1.1 Getting Things Done: One very common structure for producing outcomes is the **linear hierarchy**. This structure is widely used in business, the military, and many other organizations. The primary feature of this structure is a pyramidal shape with multiple levels, traditionally with the workers on the lower levels and managers on the upper levels. Diagram 1.1 provides an example of a linear hierarchy.

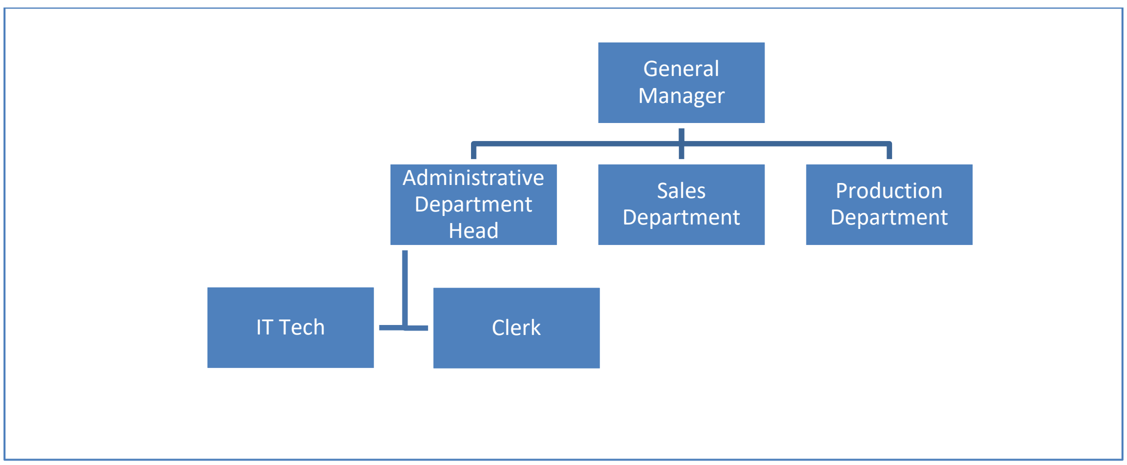


Diagram 1.1 – Linear Hierarchy

A linear hierarchy is an effective tool for producing outcomes mainly because people at each level in the hierarchy work at different levels of abstraction, and operational leadership streamlines task accomplishment. Here is an example of this concept:

A person working as a clerk in the Administrative Department has a very detailed knowledge of word processing and other specific skills relating to his job, and doesn't need to know anything about keeping the company intranet working. The Administrative Department Head (our fictitious clerk's supervisor on the next "higher" level of the organization) would need a broad understanding of the duties and responsibilities of all the people in her department, without the expertise any of them possesses. She knows who to assign to tasks such as creating a professional-looking document or bringing the network back on line after an outage.

The General Manager of the company has the highest level of abstraction and thus the broadest view. This broad and relatively shallow understanding of the work done by each department contributes to the manager's ability to make effective day-to-day operational decisions. The manager knows enough about what goes on at each level of the organization to effectively guide how they work together as a whole.

Identifying one leader for each department (and one for the organization) produces clarity about who is responsible and accountable for the department or organization producing the desired outcomes.

When there is one clearly defined leader with the authority to make operational decisions, the desired outcome is likely to be achieved efficiently and effectively. In contrast, when there is a lack of clarity about who makes operational decisions, or if everyone makes them, it can be very difficult to operate with effectiveness and efficiency.

1.1.2 Decision Making: People in groups make decisions in a variety of ways (see Diagram 1.2 for a description of some common decision making systems and their relative benefits and challenges). Generally speaking, different organizational structures support different types of decision making. For illustration, let's look at two types of organizational structures and the types of decision making they support.

1.1.2.1 Linear Hierarchy: as described in Section 1.1.1, this structure is designed to support one person making operational decisions for their unit of the organization. These decisions are autocratic in nature (the final decision is made by one person), even when input is received from others in the group.

1.1.2.2 "Flat" Organization: an organization like a food cooperative might operate without any hierarchical structure, and use the unamimity decision making system where everyone makes decisions together by agreement.

1.1.3 Participation: A correlation also exists between the decision making system in use and level of participation in decision making. At opposite ends of the continuum of participation are autocratic decisions (one person makes the decision) and unanimous decisions (everyone agrees to the proposal).

System	Description	Primary Benefit	Primary Challenge
Autocratic Edict	One person makes decisions for the entire group.	Speed and simplicity.	Lack of participation and inclusion; lowest level of commitment to decision by other group members.
Tradition (Faith)	"We've always done it this way."	Provides continuity and predictability.	May not result in a high quality decision.
Chaos	No set process – decision emerges from open discussion.	Lack of structure can stimulate creativity and synergistic participation.	Lack of structure can lead to frustration and disengagement.
Chance (Random)	Random process such as coin flip or drawing straws.	Impartiality and ease.	Quality of decision is unpredictable and inconsistent.
Majority Vote	Majority gets its way.	Balance between speed and participation.	Needs of minority are ignored.
Consent	Nobody objects to the proposal.	Everyone can live with the outcome and all needs are considered.	High quality decisions take time, skill, and practice.
Unanimity	Everyone agrees to the proposal.	Generates highest possible level of commitment to decision.	Can be time-consuming and frustrating.

Diagram 1.2 – Decision Making Systems

1.2 Leadership: This word may trigger a degree of discomfort in those of us who have only experienced autocratic leadership in a system where someone else made decisions that impacted our lives and we believed our needs were not fully taken into account. In this handbook we will consider leadership in terms of **power**, **responsibility**, and **accountability** within the organization. Further, we can think of leadership (or leading) as a *function* that is carried out by one or more people in the organization, rather than as limited to the identities or roles held by those people.

1.2.1 Power: We define **power** as influence within the organization, or more broadly as "the capacity to mobilize resources to meet needs." A person fulfilling the leadership function mobilizes the resources at their disposal in order to produce the desired outcome. In Sociocratic terms, we define this outcome as a product or service and call it the **aim** of the organization. Putting it together, you can think of the leader as someone who organizes the work done by other people (the resource), using the influence inherent in the position as leader (structural power), to effectively achieve the aim of the organization.

1.2.2 Responsibility and Accountability: Another aspect of leadership we can consider is the relationship among the leader, the people in the organization, and the aim of the organization. Simply put, the leader is **responsible** for achieving the aim of the organization, and **accountable** to the group as a whole.

CONSIDER THIS: The words "organization" and "organism" are very similar, so let's do a little thought experiment comparing an organization of people and a living organism. In a living organism, information and influence (power) are exchanged among "levels" using feedback loops and multiple lines of communication; think of the nervous system, for example. In other words, ***power flows both ways****. An organization based on a linear hierarchy, however, is "wired" such that power only flows one way (down). There is no built in feedback mechanism, so information from below can be ignored by the leaders. Could a living organism function this way? What would happen if the brain could only give instructions and not receive feedback from the rest of the nervous system?*

1.3 Circular Hierarchy: An organizational model that provides a built-in two-way flow of power is the **circular hierarchy**. This structure can be laid directly on top of a linear hierarchy, so that it preserves the effective characteristics of that form while providing the feedback mechanism necessary to sustain organizational life, growth and learning. Diagram 1.3 provides an example of how a circular structure relates to a linear hierarchy. These terms are generic and may be adapted to suit the organization.

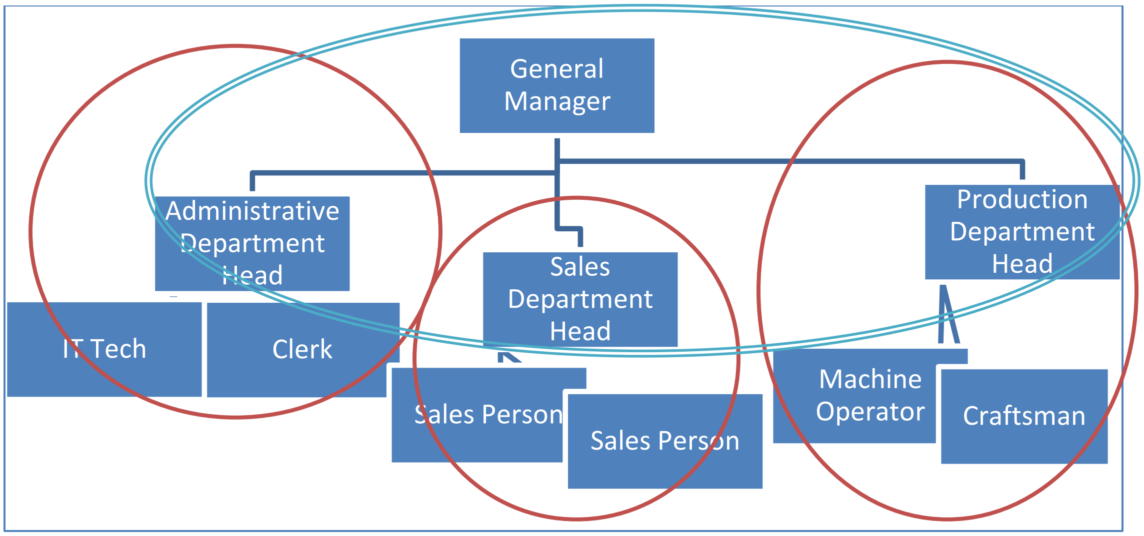


Diagram 1.3

1.3.1 Circle Structure: Each operational unit of a linear hierarchy can also be organized as a circle. The circle can be thought of as "an arena where things happen" – in this case, what happens is that **decisions are made**. The members of the circle gather periodically to decide together on the policies that govern the work they do together, which is part of the "leading" function. Once these decisions are made, with the equivalence of every member, the operational leader carries out the day to day "doing" in much the same way as described before. The difference in this structure is that everyone involved has consented to the policies governing the shared work toward achieving the aim. These "Operational Circles" are shown with single red ovals in Diagram 1.3.

1.3.2 General Circle: The General Circle (GC) consists of the General Manager, the Operational Leader of each Operational Circle, and one or more elected representatives of each of those circles. The GC is shown with a double blue line in Diagram 1.3.

1.3.3 Double Link: The structural element that provides the built-in two-way flow of power and information is known as the **double link**. Each circle's operational leader provides the downward half of this link, and one of the circle members (selected by all circle members) provides the upward half of this link. Diagram 1.4 shows the double links in our fictitious circle structure with blue arrows.

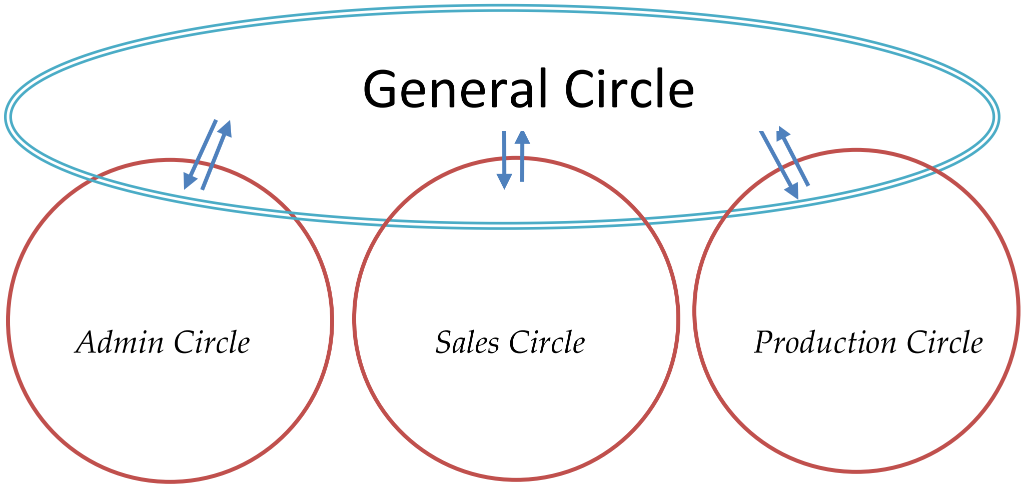


Diagram 1.4

1.3.4 Circle Characteristics: Each circle (including the General Circle) has its own Vision, Mission, Aim, and Domain.

- Vision: a view or dream of the world the circle is working toward.
- Mission: how the circle operates in order to realize the vision (internal view).
- Aim: a product or service that is the focus of work for the circle (external view).
- Domain: the circle's area of responsibility for decision making.

Sociocratic Circle Meeting
Facilitator Handbook

Section 2: Circle Meetings, Double-Linking, and Consent Decision Making

2.0 Objectives

- 2.0.1 Identify the purpose and format of a circle meeting, and the three primary roles in the meeting
- 2.0.2 Describe how a double-link provides a structural pathway for the two-way flow of power and information within an organization
- 2.0.3 Describe the relationship between personal range of tolerance and organizational range of tolerance
- 2.0.4 Define the two elements of an objection

2.1 Circle Meetings

- 2.1.1 Purpose: The purpose of a circle meeting is to make decisions that produce the policies guiding the "doing" or operations of the circle. In a circle meeting, each member of the circle has **equivalence**; that is, each member's voice is equally valued and each member has equal power to object to any proposal considered by the circle.
- 2.1.2 Format: A circle meeting follows a particular format designed to bring the members of the group together, efficiently handle all of the group's decisions, and measure or evaluate the meeting. The Circle Meeting Process Guide shows a synopsis of the circle meeting format as a reference for meeting facilitators.

  NOTE: It is important to remember that the circle meeting format encourages an easy, natural way of decision-making - the kind of spontaneous and joyful organizing that we learned as young children during play. The following procedures are intended as a guide to the art of enjoyable decision-making. When the meeting is going well, you are likely to experience the kind of happiness that comes from the discipline of practicing a musical instrument. If there is a "wooden" or "stiff" feeling about the meeting, it is likely that you are interpreting the procedures too rigidly. They are meant to guide a flexible, fluid process.

  - 2.1.2.1 Rounds: A "round" is used to establish equivalence and ensure each circle member has the opportunity to provide input into the circle's decisions. During a round, each person has a turn and is able to speak without interruption or feedback. Once the round is over, the facilitator may choose to open the form to a "popcorn" or interactive style. Rounds are also useful for re-establishing order when creative chaos overcomes equivalence and for regaining momentum when the process stalls.
  - 2.1.2.2 Circle Meeting Elements: All circle meetings have the same structure.

2.1.2.2.1 Opening Round: The opening round is used to "attune" the circle members to each other and the circle's aim, to check in with what's alive for each member, and to gather additional agenda items for the content portion of the meeting.

2.1.2.2.2 Administrative Items: This section of the meeting serves to establish administrative structures such as the length of the meeting, the date, time, and place of the next meeting, and any announcements pertaining to the meeting. It is also the time to consent to minutes from the previous meeting and consent to the meeting agenda.

2.1.2.2.3 Items of Content: In this, the main part of the meeting, items of content are handled. Each item consists of a decision to be made using one of the three consent decision making formats (short format, long format, and selection). We will cover each of these formats in detail in subsequent sections.

2.1.2.2.4 Closing Round: The closing round is used to assess, or measure, the effectiveness of the meeting. Each member has the opportunity to provide feedback on the facilitation and participation experienced during the meeting, as well as "checking out" with what's alive in the moment.

2.1.3 Roles & Responsibilities: There are four officers of the meeting. The three primary roles are **facilitator, recorder / meeting manager, and operational leader**.

2.1.3.1 Facilitator: The facilitator is responsible for the execution of the circle meeting, and is selected by the circle. The facilitator balances creative chaos and ordered structure to maximize creativity, effectiveness, and equivalence. During the circle meeting, the facilitator "holds" the aim of the circle and returns awareness of the circle to the aim if the decision making seems to get stuck.

2.1.3.2 Meeting Manager: The meeting manager is responsible for setting up the meeting space, ensuring all members are informed of meeting time and place, and working with the operational leader and facilitator to prepare and distribute the meeting agenda prior to the meeting. The meeting manager is selected by the circle, and this role is often combined with the role of Recorder.

2.1.3.3 Recorder: The recorder is responsible for keeping the circle's logbook (including meeting records) and keeping minutes during each meeting. The recorder is selected by the circle, and this role is often combined with the role of meeting manager.

2.1.3.4 Operational Leader: Outside of circle meetings, the operational leader is responsible for leading circle. Within a circle meeting, the operational leader participates with equivalence, and helps the facilitator "hold" the aim of the circle. The operational leader is selected by the next higher circle.

2.1.3.5 Upward Link: The upward link (representative) is selected by a lower circle as its representative. This person (or persons) is a full member of the upper circle, with consent, and may serve in any of the elected roles of the circle (facilitator, recorder, or meeting manager).

2.1.4 Participation: Each circle member is responsible for participating to the best of their ability in the activities of the circle meeting. This can include revealing what is personally important with **authenticity** and **transparency**, inquiring about what is important to others with **curiosity**, and **suspending judgment** while making these inquiries.

2.2 Double Link: As described in Section 1.3.3, each circle selects one or more representatives to the next higher circle, who participate as a full member of both circles as described in Section 2.1. This person functions as the "upward link," ensuring the upward flow of power and information. The operational leader of each circle is selected by the next higher circle, and functions as the "downward link," providing the downward flow of power and information.

2.3 Consent Decision Making: In a nutshell, consent decisions are designed to be **good enough for now and safe enough to try**, contrary to our conditioned impulse to make **perfect decisions that last forever**. "Good enough" is defined by the absence of an objection (see following paragraphs), and "for now" is defined by the review date (measurement date) set in the proposal (see Section 5.2).

2.4 Range of Tolerance: This concept is central to understanding what we mean by a "paramount objection." It is also very important to distinguish one's personal range of tolerance from one's organizational range of tolerance.

2.4.1 Personal: Every individual has a particular preference or "sweet spot" in a given situation. Diagram 2.2 illustrates this concept. Using food as an example, let's say I prefer to eat a local, organic, vegan diet if possible (inside the red oval). I am also willing to eat non-local, non-organic food, including eggs and dairy; these items are outside my preference and still within my range of tolerance (inside the double blue oval). I am NOT willing to eat meat of any kind: this is outside my personal range of tolerance (everything outside the double blue oval).

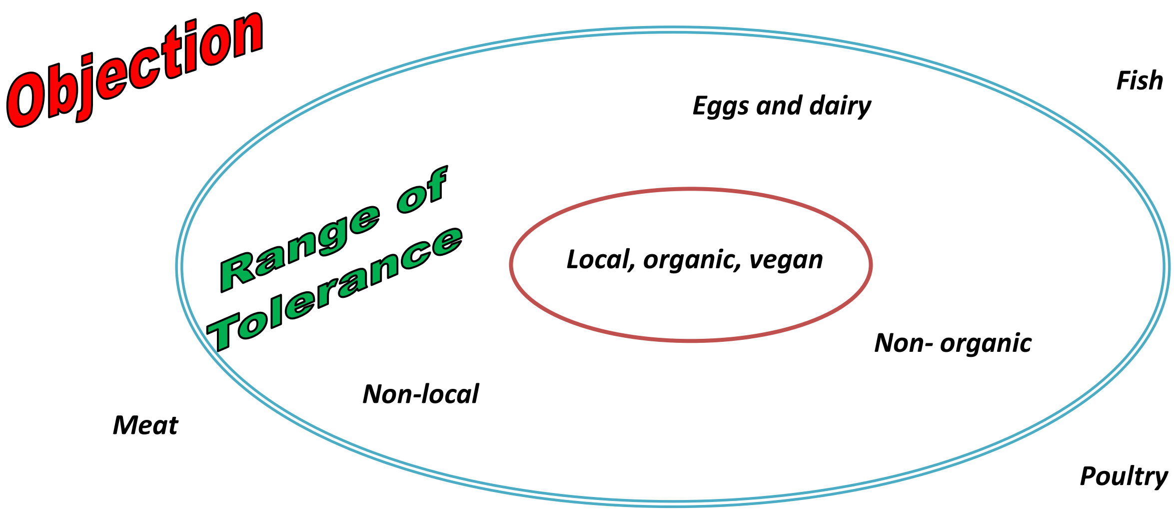


Diagram 2.2

2.4.2 Group (organizational): In the context of the group or organization, my range of tolerance may be broader. For example, if I belong to an organization that is planning a formal dinner, I am perfectly willing for meat to be on the menu, provided there is also a vegetarian option. I would not be willing for there to be only meat served, both because of my personal range of tolerance and my value of inclusion for the group. Without a vegetarian option, we might exclude members of the group (including me) from participating in the dinner. In other words, my personal range of tolerance **informs and does not define** my organizational range of tolerance. Diagram 2.3 illustrates this concept, with the group range of tolerance shown by the dashed green oval.

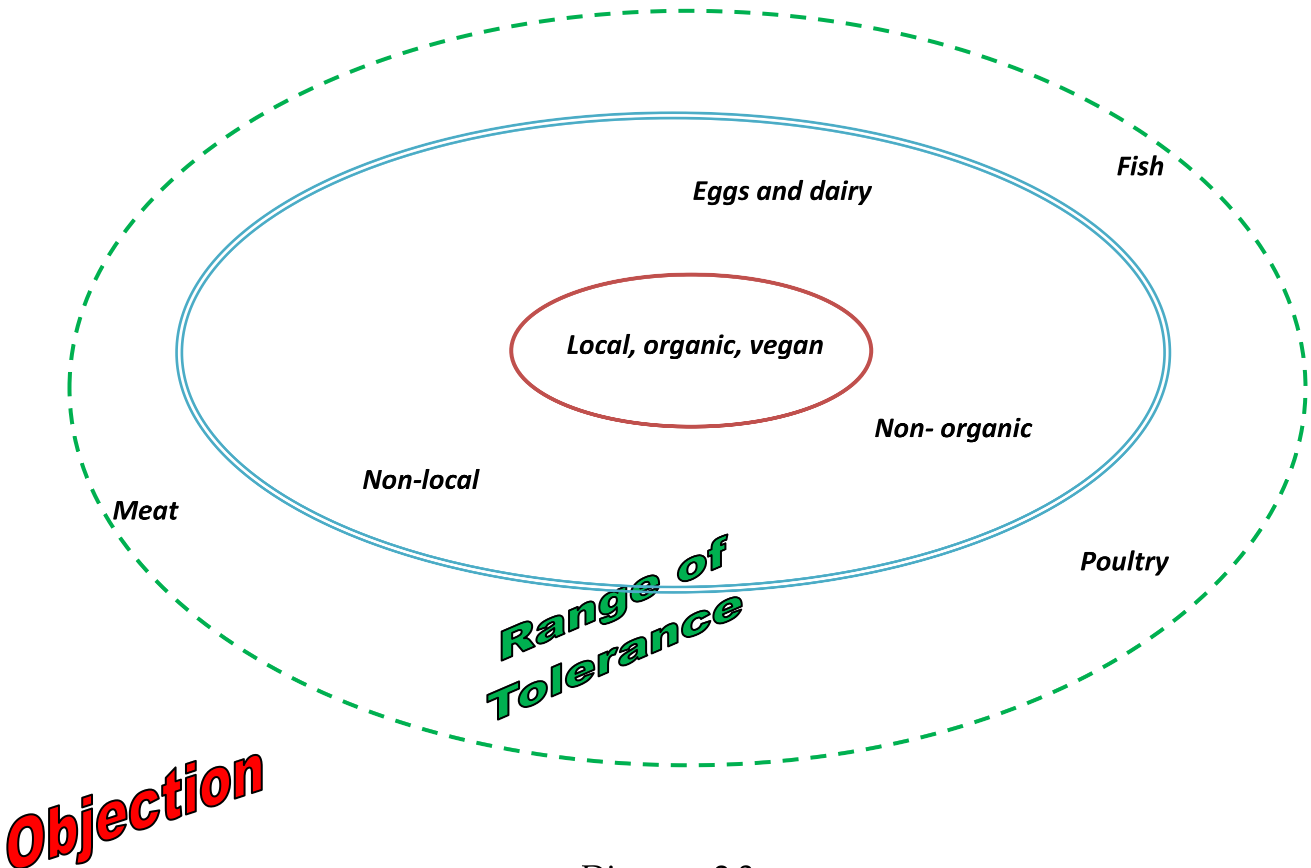


Diagram 2.3

2.5 Objections: When we make a consent decision, we ask for **objections** rather than for agreement. This is because an objection contains valuable information about the proposal, information that cannot be ignored without preventing the circle from realizing its aim or risking damage to the circle.

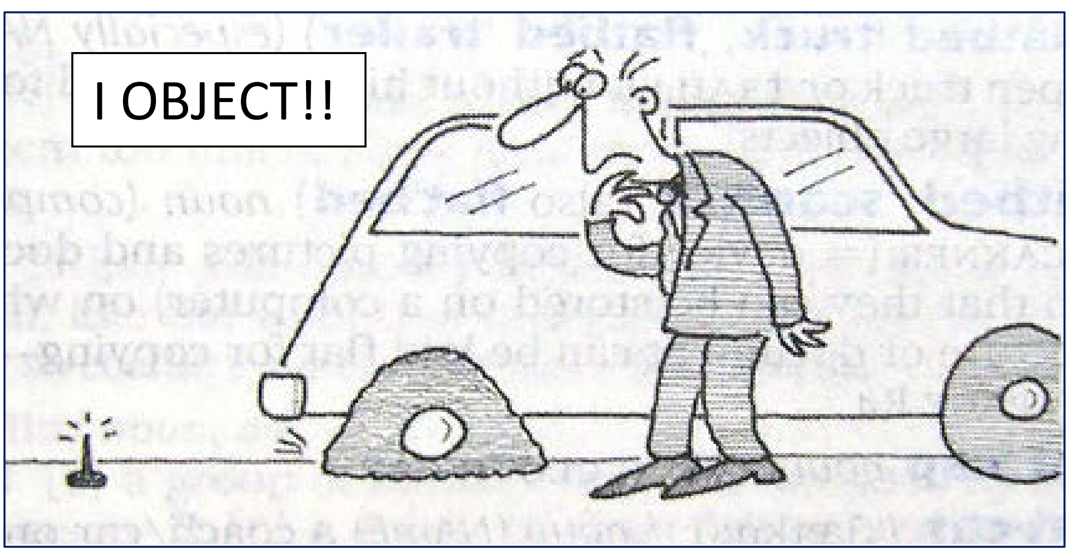
- 2.5.1 Definition: *"An argument against a proposed decision, stated clearly enough to be resolved. In Sociocratic organizations,* ***consent*** *is based on the absence of* ***argued and paramount objections****."* (WTP, p. 246)
- 2.5.2 Argued (Reasoned): An objection is **argued** when it points our characteristics of the proposal that can be evaluated using reason – in other words, it contains an observation.
- 2.5.3 Paramount: An observation is **paramount** when it points out an aspect of the proposal that takes the individual out of his or her **organizational range of tolerance** or might prevent the circle from accomplishing its **aim**.

2.5.4 Note: The Dutch word translated as "objection" is *bezwaar*, literally translated as "a twist in the belly" or "a heavy heart." This definition points to the intangible, felt nature of an objection that might not be easily articulated.

2.5.5 Example: Consider the example of a person driving a car down the road. The driver performs the leading function, so is "the boss." If the driver decides to operate the car **autocratically**, he or she can ignore feedback from the car such as a red light on the dashboard. If the feedback is ignored long enough (let's say it's the low oil light), the engine may seize, causing damage to the car (the system) that is either irreparable or very costly to repair.

Let's look at another situation, in which the car is operated by majority vote. If there is a flat tire, the driver could "take a vote" and determine that 75% of the tires are willing and able to continue, and thus decide to keep going. Again, this would likely result in major damage to the car (the system).

Finally, consider a car operated using consent. Using the low oil light as an example, we can see that one of the equivalent members of the system (in this case, the lubrication system) has raised an **argued and paramount objection**. The objection is **paramount** because if it's ignored, the car will suffer damage and become unable to continue its **aim** of producing safe and reliable transportation. The objection is **argued** because there is an observable characteristic – the oil pressure in the system is below a predefined limit. So the lubrication system's objection (if it could talk) might sound like "I am raising an objection – the oil pressure in my system is 45 psi, and without maintaining at least 60 psi the engine will not be adequately lubricated, and we will not be able to continue driving safely."



Sociocratic Circle Meeting
Facilitator Handbook

Section 3: Facilitation Formats and Introduction to the Short Format

3.0 Objectives

- 3.0.1 Identify the three basic formats used in a circle meeting to make consent decisions and state when they are used
- 3.0.2 Identify several possible strategies for resolving an objection to a proposal
- 3.0.3 Describe the types of decisions best handled using the consent decision process when a proposal is present (short format decision)
- 3.0.4 Demonstrate familiarity with the five steps of the short format decision process

3.1 Consent Decision Making Formats

- 3.1.1 Proposal Present (Short Format): When a **proposal is already prepared**, either as the result of a previous process or being brought by an individual, the "Short Format" decision process is used. This is a streamlined version of the "Long Format" process. Handbook section 3.4 details this process.
- 3.1.2 Selection to Tasks and Positions (Selection): **Selecting a person to a role or task** of the circle is also a decision made by consent, following a special process based on the Long Format. This process is detailed in Section 4 of this handbook.
- 3.1.3 No Proposal Present (Long Format): When a decision is required, and **no proposal has been prepared**, the "Long Format" decision process is used. This process is detailed in Section 5 of this handbook.

3.2 Receiving an Objection: When a circle member offers an objection, it becomes the **shared dilemma** of all circle members, who now assume joint responsibility for resolving it. Because we are conditioned to think of objections as negative or "blocking" progress, it is important to cultivate a culture in the circle that values an objection as a valuable contribution to the circle. When the circle receives an objection as a gift, the members are more likely to resolve it with grace and ease.

3.3 Resolving an Objection: As defined in Section 2, a consent decision is made when there are no **paramount** and **argued (reasoned)** objections to the proposal. An objection represents characteristics of the proposal that might **not be feasible** or might **prevent the circle from accomplishing its aim**. Thus, resolution is aimed at amending the proposal to transform the characteristics prompting the objection. There are many possible strategies to achieve this, including those listed below:

- 3.3.1 Facilitator amends the proposal: Based on their individual understanding of the objection, the facilitator might offer an amendment.
- 3.3.2 Round to collect resolution ideas: Ask each circle member "how would you resolve this?" This emphasizes that the objection is now a mutual dilemma and engages the wisdom of the group in finding a resolution.

- 3.3.3 Small Dialogue: Two or three people, usually including the person who offered the objection, might work to resolve it.
- 3.3.4 Free-form Dialogue: Similar to the round, using chaos to elicit a creative resolution.
- 3.3.5 Refer to Helping Circle: If a resolution does not emerge with ease, or if time constraints prevent using one of the other strategies listed here, the proposal can be referred to a Helping Circle for amendment. They would then bring an amended proposal back to the circle during a subsequent meeting.

3.4 Short Format Consent Decision Process: The Circle Meeting Process Guide contains a visual flowchart to support the facilitator in following this process.

- 3.4.1 Present Proposal: The facilitator reads the proposal, or if it is a long and detailed one, reviews the main points. *NOTE: it is very helpful to distribute proposals before the circle meeting, and for all circle members to prepare by reading and understanding the proposals.*
- 3.4.2 Clarification Round: In a round, each circle member has the opportunity to ask questions about the proposal. The purpose of this round is to **gain clarity and shared understanding** about the proposal as it is written, not to propose changes or offer an opinion. The recorder notes any changes to the proposal required for clarity.
- 3.4.3 (Quick) Reaction / Response Round: In a round, each circle member has the opportunity to **express a gut response to** the proposal. This is also the time to suggest or request changes and additions to the proposal. The recorder notes any changes to the proposal resulting from this step.
- 3.4.4 Consent Round: After the recorder reads the proposal as amended (or reviews any changes resulting from the first two steps), the facilitator checks for consent to the decision by asking each circle member in turn "**do you have an objection**?" If there are no objections, then the proposal passes and is recorded as a decision. If any objections are offered, they are noted and the round continues until everyone has been heard. At this point, any objections are resolved by one of the methods listed in Section 3.3. Once the proposal is amended, a final consent round is conducted.
- 3.4.5 Celebrate the Decision!

Sociocratic Circle Meeting
Facilitator Handbook

Section 4: Measuring Meeting Effectiveness and Introduction to Consent Selections

4.0 Objectives

- 4.0.1 Describe how Closing Round comments provide a measurement of meeting effectiveness, contribute to continuous development, and improve the quality of subsequent meetings
- 4.0.2 Identify which types of decisions are best handled using the selection process
- 4.0.3 Demonstrate familiarity with the six steps in the consent selection process

4.1 Measuring Meeting Effectiveness: In a Circle Meeting, the Closing Round performs the measurement function. It is an opportunity for circle members to share the quality of their experience during the meeting, and particularly anything about the meeting structure or facilitation that did not meet needs for them. This information helps the facilitator develop skills and awareness in the role, and ultimately contributes to continuous improvement in the quality of meeting facilitation.

4.2 Consent Selections

- 4.2.1 Selecting people to roles, tasks & positions: Habitually when we select someone to fulfill a role (position) or do a task, we ask for volunteers or the leader just designates someone. This limits choice for others in the group and can result in the "usual suspects" always volunteering, which can lead to burnout and a loss of effectiveness. Selecting people by consent makes this a group decision, bringing more information, choice and wisdom into the process.
- 4.2.2 Selecting one or more options from a list: This process is also effective when selecting one or more options from a list; for example, prioritizing projects or selecting the venue or date for a training.
- 4.2.3 Guidelines for consent selections:
  - Before the selection, consent to a description of the role which defines the Qualifications, Responsibilities, Term and Measurement for the role.
  - Base arguments for your nominee (and arguments if you object) on how well the nominee's qualifications match the role responsibilities.
  - Nominate yourself, someone else in the circle, or nobody.
  - Listen carefully to the arguments during the Say "Why" Round, without dialogue.
  - Refrain from asking who is interested, because it potentially reduces the amount of information available to the circle.
  - Trust you can change your mind after hearing arguments for other nominees in the Say "Why" Round.
  - Let go of any expectation of finding a perfect candidate for the role.

- Resist the temptation to do anything that reduces the amount of information available in the process. This includes making arguments against a nominee and making assumptions about a person's willingness or availability.

4.2.4 Terminology

4.2.4.1 Nominee: A person nominated for a position during the nomination round.

4.2.4.2 Candidate: The nominee with the strongest arguments (reasons) for the position, proposed to the circle for consent.

4.2.4.3 Position Description: A description of the task or role being selected. It typically includes five elements: Position Title, Qualifications, Requirements, Term, and Measurement Strategy.

4.2.5 Consent Selection Process

4.2.5.1 Review Position Description: If you've already consented to the description, review it and make changes as needed. When it's the first time the description is used, or changes are made to the existing description, consent is required to use the description.

4.2.5.2 Submit Nominations: Each circle member submits a nomination form: " _______ nominates ________"

Who to nominate?

- Yourself
- Someone else
- Nobody (write "Pass")

How to choose your nominee?

- Qualifications relative to requirements
- Personal Experience
- NOT necessarily who is interested

4.2.5.3 Say "Why" Round: The facilitator reads each nomination slip, asking the nominators in turn to explain their reasoning, which hopefully relates their nominee's qualifications to the requirements of the position.

4.2.5.4 Change Round: Each circle member is asked whether they want to keep the same nomination or make a change. Change your nomination only if you are influenced by the arguments (reasons) for a different nominee presented by others in the Say "Why" Round. Refrain from changing your nomination just because one person has been nominated multiple times.

4.2.5.5 Candidate Proposal and Consent Round: The facilitator, someone else, or the group selects the nominee with the strongest arguments as the candidate for the position.

Using a round, the facilitator asks for objections to the candidate.

- Objections are noted, and the round continues to the end
- The candidate is the last one invited to object

In case of one or more objections, the facilitator modifies the proposal and checks for consent.

- Change the position's term, qualifications, or requirements.
- Propose a different candidate

4.2.5.6 Celebrate the Decision!

Sociocratic Circle Meeting
Facilitator Handbook

Section 5: Introduction to the Long Format

5.0 Objectives

- 5.0.1 Identify which types of decisions are best handled using the long format decision-making process
- 5.0.2 Demonstrate familiarity with the nine steps of this process
- 5.0.3 Describe the application of the measurement function to circle meetings and consent decisions

5.1 Long Format Consent Decision Process (See Circle Meeting Process Guide for flowchart)

- 5.1.1 Picture Forming – "Unraveling the Ball of Yarn"
  - 5.1.1.1 Present the Dilemma or Question: State the question or topic as it's been brought to the circle (the "ball of yarn").
  - 5.1.1.2 Identify the issues, criteria, or needs to be addressed by the decision (round): Starting with a round, identify the specific dimensions or issues of the main topic that need to be addressed by the decision. These can also be approached as criteria for a successful decision or needs to be met by the proposal. Consider opening the format to "popcorn" once everyone's had an opportunity to contribute, or continue with another round (identify the individual "strands of yarn").
  - 5.1.1.3 Consent to completeness of the list: Once the creativeness slows or ceases, check to see if the list is "good enough for now." You can always come back later and add another item.
- 5.1.2 Proposal Shaping
  - 5.1.2.1 Generate proposal ideas in rounds: Collect specific ideas for strategies that address the list of issues / criteria / needs generated during Picture Forming. Once again, consider using either repeated rounds or open dialogue once everyone has had a chance to contribute. At this point all proposal ideas are equally valid, whether or not there might seem to be contradictory ideas.
  - 5.1.2.2 Organize proposal ideas and form proposal: Bridge proposal ideas and "tune up" the proposal. This might be done by a smaller group (helping circle) during a break or between circle meetings.
  - 5.1.2.3 Confirm the proposal addresses all issues: Check that all issues / criteria / needs generated during Proposal Shaping are addressed.

5.1.3 Make Decision

5.1.3.1 Present / Review Proposal: Prepare the exact wording of the proposal, if not already done, and check that everyone understands it as presented.

5.1.3.2 Consent Round: Check for objections to the proposal. Resolve any objections as described in Handbook Section 3.3.

5.1.3.3 Celebrate the Decision!

5.2 Measurement

5.2.1 Circle Meeting: In a Circle Meeting, the Closing Round performs the measurement function. It is an opportunity for circle members to share the quality of their experience during the meeting, and particularly anything about the meeting structure or facilitation that did not meet needs for them. This feedback helps the facilitator develop skills and awareness in the role, and ultimately contributes to continuous improvement in the quality of meeting facilitation.

5.2.2 Decisions: A circle makes a consent decisions to create policy for the circle, which fulfills the **leading** function of the circle. The circle then implements or carries out these policies, which is the **doing** function. After a time span defined in the policy, the policy (and thus the decision) is evaluated to see how well its implementation matches the intentions of the policy. This fulfills the circle's **measuring** function.

Sociocratic Circle Meeting
Facilitator Handbook

Section 6: Effective Meeting Preparation and Recording

6.0 Objectives

- 6.0.1 Describe how effective preparation contributes to an effective meeting
- 6.0.2 Identify the purpose and minimum required content of circle meeting minutes

6.1 Circle Meeting Preparation

- 6.1.1 Meeting officers
  - 6.1.1.1 Facilitator: Prepare agenda with support of Operational Leader and Recorder. Review previous circle meeting Closing Round comments for measurement of previous performance and ideas for improvement.
  - 6.1.1.2 Recorder: Support the Facilitator in preparing the agenda; distribute the agenda and any supporting materials to all circle members prior to the meeting; prepare meeting space (assumes this role is combined with Meeting Manager).
  - 6.1.1.3 Operational Leader: Support the Facilitator in preparing the agenda.
- 6.1.2 All participants: Each circle member is responsible to prepare for the circle meeting by reading and being familiar with the materials circulated prior to the meeting. This preparation, in addition to active participation and engagement in the meeting, contributes to ease, efficiency, and effectiveness in handling agenda items.
- 6.1.3 Effective meetings are more likely when all circle members are prepared, have a shared understanding of the agenda and all content items, and are engaged in the meeting before arriving.

6.2 Circle Meeting Minutes: While the minutes of a circle meeting are the responsibility of the circle's recorder, it also behooves the facilitator to understand their purpose and required content.

- 6.2.1 Purpose: As mentioned in Section 2.1, the minutes of the circle meeting form a vital part of the circle's memory system, the **logbook**. This is a document where all circle members may view previous decisions and meeting measurements, and which serves as a support to both the operational leader and the facilitator in their duties.
- 6.2.2 Required Content: The only required content for circle meeting minutes are the **final text of any decisions** and **closing round comments**. Administrative items such as date, attendees, etc. is also helpful, and you might also choose to include the arguments offered in a selection process.