

Sociocracy Academy: Mentors and classes

Mentors

Gregg Kendrick.....	2
Nora Plaza.....	2
Graham Boyd	3
John Buck	3
Jerry Koch-Gonzalez.....	4
Rea Gill	4

Classes

Cooks with Knives & Surly Bakers: Mosh Pit Sociocracy	5
Sociocracy in a school.....	5
Sociocracy in a production company	6
Advanced Facilitation	6
Boards and top circles	7
Relational Skills to Support Sociocracy	7
Implementation – struggles and strategies	8
Supporting implementation circles	8
Objections practice session	9
Introduction to NVC.....	9
Sociocracy in the workplace: What are the unique challenges and opportunities.....	10
Sociocratic governance: cultivating emotional balance	10
Writing role descriptions	11
Designing circle structures	11
Complex elections	12
Self-governance and ownership	12
NVC to support facilitation	13
Additional workshops!.....	13
Learning by working in a SoFA circle	14

Gregg Kendrick



For 19 years, Gregg was co-owner & CEO of a software technology training firm whose clients were primarily Fortune 500 corporations & federal agencies. Within this business, he brought an awareness of needs-based communication among the staff and transformed the structure & operation of the business to be a needs-centered culture.

Awed by the potency of that experience, Gregg founded Basileia LLC and has been a full-time consultant/trainer since 2004. Using human needs-based frameworks and processes, such as needs-based

communication (NVC™), the Cultural Transformation Tools of Barrett Values Centre, or the Sociocratic Circle Method, he supports leaders to activate the human potential of themselves, their teams and their organization. His specialty is "whole-team" facilitated conversations that deepen connection among team members while advancing the team toward its goals.

Gregg's work focuses on developing "power-with" leaders rather than "power-over" — teaching a mindset and skill sets that inspire, empower and build trust among people. These leaders become more authentic, more empathic and more grounded as they create cultures of collaboration and purpose.

Other key business experience includes serving on several boards of directors of nonprofit & for-profit organizations, and co-managing an investment fund for seven years. Gregg is a CTT Certified Consultant and a Certified Nonviolent Communication (CNVC) Trainer who has facilitated extensive trainings in the United States, Canada, Germany, Sweden, Australia, South Korea, India and South Africa — including being a trainer at International Intensive Trainings with Marshall Rosenberg, the developer of NVC.

He resides in Charlottesville, Virginia, with his wife and three daughters.

Gregg sees his strength with...

People who are applying sociocracy within the workplace (nonprofits, businesses, departments, etc.).

Nora Plaza is dedicated to facilitation, the support of teams and groups. She has worked for 20 years in organizations related to Human Rights and Ecology, doing work on the realization of manuals, translation of books, production of documentaries and giving training and workshops.

She has a degree in Hispanic Philology, Audiovisual studies and Master degree in International Humanitarian Action **NOHA**.

In recent years, all of her work has focused on the diffusion of sociocracy, facilitation, training and accompaniment of groups in transition to sociocracy and sustainable management methods. She also works elaborating audiovisual material that helps the information arrive in a faster and easier way to the people.

She has experience with the implementation of sociocracy in for profit and nonprofit organizations, and also in schools. And she has worked for the local government training people so they can bring the sociocracy to their companies and organizations.

Currently, Nora Coordinates **Sociocracia Practica** and is member of the General Circle of Sociocracy For All.

Nora sees her strength with...?

People who want to implement or teach sociocracy.
People who are involved with schools or non-profits.
People starting or transforming their own projects or small companies.
People who speak Spanish.

Nora Plaza



Graham Boyd



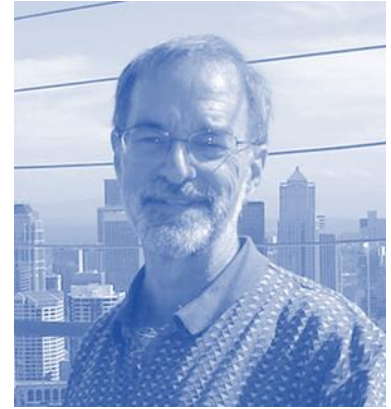
Graham has experienced working in academic research (particle physics), corporate innovation management (P&G) and over the past decade starting up Teal companies designed to harness the power of business for the good of all. His experiences with conflict and tension trigger him to begin developing suitable legal forms, now called the Free FairShares limited and cooperative company forms. He now helps companies all over the world integrate Free FairShares, self-governing and vertical development into a complete Teal approach.

Graham has extensive experience with the complexity of leading business and is driven to make a difference through innovation that enables businesses and people to do more with less friction. As well as reinventing the world from the ground up he enjoys travelling, food, and long distance motorcycling.

Graham sees his strength with...

...people who are open to standing at the edges between disciplines, paradigms and worldviews; who are themselves early adopters; and ready and willing to let go of their identity-level attachments to the boxes that now limit them.

John Buck



John Buck has extensive leadership experience with government and corporations, including managing more than 200 people on information technology projects. John is the first person, not native to the Netherlands, to be certified in the circle-organization method of governance (dynamic governance), thus, becoming the first certified consultant in dynamic governance in the United States.

As head of GovernanceAlive LLC, he has introduced dynamic governance to a wide range of businesses and organizations, assisting them in designing work and making group decisions effectively by “rewiring” their basic power structure.

He earned a Master’s degree from George Washington University and is coauthor of *We the People: Consenting to a Deeper Democracy – A Guide to Sociocratic Principles and Methods* and *Company-wide Agility with Beyond Budgeting, Open Space, and Sociocracy*. John is currently on the board (mission circle) of Sociocracy For All.

Jerry Koch-Gonzalez



Jerry helps companies and organizations implement sociocracy to create adaptive and effective organizations where all members' voices matter. He is a consultant and certified trainer in both Dynamic Governance /Sociocracy and Compassionate Communication (NVC), with a focus on governance, decision making, communication skills, and conflict resolution.

He has been a Board member of the Institute for Community Economics, United for a Fair Economy, and Class Action, He has been a trainer with Movement for a New Society, the National Coalition Building Institute, DiversityWorks, Cambridge Youth Peace &

Justice Corps, Lesley College Center for Peaceable Schools, Boston College Center for Social Justice, the Association for Resident Controlled Housing, and Spirit in Action.

Jerry was a member of The Sociocracy Consulting Group from its founding until 2017. Jerry is a founding and current resident of Pioneer Valley Cohousing, a 21-year old community in Amherst MA that has been successfully using sociocracy (aka Dynamic Governance) for the last 6 years. With his partner, Ted Rau, Jerry founded Sociocracy For All in 2016 and wrote/published the sociocracy handbook "Many Voices, One Song".

Jerry sees his strength with...

...implementation overall and those who want to become well-rounded trainers. His heart is in social change organizations, communities, non-profits, for-purpose.

Rea Gill



Rea Gill has worked for 2 years in non-profit leadership and has extensive expertise in the design and implementation of effective organizational governance and operating structures, with experience in overseeing all aspects of operations.

She is a published author on the topic of school governance and leadership, and has a particular interest in effective governance structures and collaborative ways of working together, particularly how the development of emotional intelligence and open-hearted communication improves effectiveness and collaboration.

She is certified in non-profit administration and community development, has a master's degree in education, and is currently completing the Cultivating Emotional Balance teacher training certification program. Rea is working with a research group looking for ways to integrate emotional intelligence training into the sociocratic governance training and circle processes.

Rea sees her strength with...

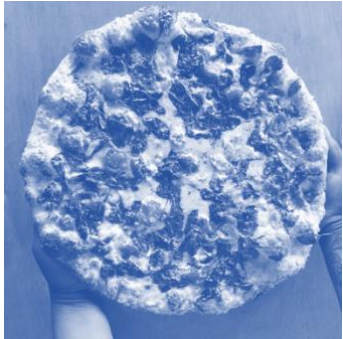
... people wanting to implement governance and management structures and practices that are conducive to individual and collective sustainable well-being and that further cooperation and collaboration.

Joe Garrison (Ask-me-anything)

Cooks with Knives & Surly Bakers: Mosh Pit Sociocracy

March 12, 16:00 UTC

2 hours



Joe Garrison is part of the worker-owned Blue Scorcher Bakery in Oregon. Joe has already presented Blue Scorcher's work in [a webinar in 2017](#). The webinar recording we highly recommend as preparation for this session!

This session is an opportunity to dive in deeper and ask about more background information around implementation and governance in a cooperative, high-paced industry.

Interesting topics will be:

- Pay in a sociocratic organization
- Circle meetings while working in shifts
- Implementation path and what kind of help they have received.
- Ongoing education
- Owner representation on the top circle

This session is *not* open to the public.

Rea Gill (Ask-me-anything)

Sociocracy in a school

Tentative date: May 9, 20.30 UTC

2 hours



Rea Gill has worked for 29 years in non-profit leadership with extensive expertise in the design and implementation of effective organizational governance and operating structures and experience in overseeing all aspects of operations. Most recently, as the Executive Director at an independent school, Rea designed and implemented a sociocratic governance structure, which was embraced and operated successfully for five years. After Rea left the school, the structure shifted away from Sociocracy.

Rea will share her experience and learning about the process of implementing the structure, and operating a sociocratic organization, incl. what worked and didn't work, and what could have been improved. The insights she gained are valuable for any organization considering adopting a sociocratic governance structure. Rea is also currently working on designing systems for integrating emotional intelligence training into the sociocratic governance training and into circle operating processes.

Interesting topics will be:

- Design, implementation and training
- How to avoid leadership burnout
- Importance of clearly defined empowered circle leadership
- Keeping policy-setting in circles & implementation with leaders
- The importance of NOT over differentiating
- Transparent and regular reporting protocols
- Increasing emotional intelligence and communication skills to support self-governance

This session is *not* open to the public.

Richard Heitfield (Ask-me-anything)

Sociocracy in a production company

Tentative date: [April 11, 14.30 UTC](#)

2 hours



Richard started implementing sociocracy at his production company beginning in 1988, with the help of Gerard Endenburg and others.

Richard entered the US Navy in 1971 as a seaman, became a 2nd class petty officer electrician, completed BS in mechanical engineering while on active duty, commissioned an Ensign in 1975, surface line officer and resigned his commission as a lieutenant commander in 1980 or 81. He went to Graduate school and worked at family business, with a degree in engineering. He ran a company business until October 2018 and just retired. Many short and longer business, sales, quality courses and seminars along the way with a fairly deep dive into hypnosis and neurolinguistic programming.

He describes himself as “chronically old (68), happy, retired from running a factory, 4 incredible kids and 6 magnificent grandkids.”

Interesting topics will be:

- ESOPs/ownership structures
- How he witnessed “Rosebud” transform from “problem employee” to most enthusiastic, contributing and happy employee and great fan of Sociocracy!
- Traditional hierarchy meets sociocracy. (He experienced significant fear in very good production employee double linked from factory floor all the way up to board of directors/top circle.)
- Early signs of the beginning of the deterioration of part of the sociocratic circle structure.

This session is *not* open to the public.

Ted Rau

Advanced Facilitation

Option 1: [Jan 25, Feb 1, Feb 8 12:30 UTC](#)

Option 2: [March 7, March 14, March 21 9:00 UTC](#)

3x 2 hours

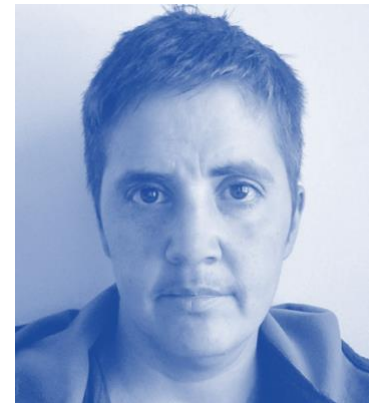
Ted will teach this foundation class offered to provide foundational knowledge and skills in facilitation, in particular improving regular circle meetings.

We will have a thorough look at meetings, sociocratic practice for policy and operational meetings, and what the typical stumbling blocks are.

- Planning meetings
- Meeting format
- Generating policy & consent process
- Creating clarity in meetings

While there will be an occasional exercise, this class is *not* intended to be a practice session but to offer clear and applicable information to experiment in meetings in the participants' own organizations.

This class is suited for supporting students of the [Sociocracy Academy](#) in acquiring badges (F1, F2, F3, F6).



John Buck

Boards and top circles

[May 7, 12:30 UTC](#)

2 hours



Boards/top circles/mission circles are like the foundation of a building or the keystone in an arch. Without them, you can't build much of a building.

Yet, many entrepreneurs try to build their NGOs or businesses without one.

In this interactive session, we'll talk about the functions of a board, the kind of people that you want on your board, and how to recruit them.

We'll also talk about worries and resistances you might feel personally about having a board.

You will be encouraged to sketch a design for your board during the session. We'll

discuss a sampling of attendees' specific situations regarding boards.

Karen Gimnig

Relational Skills to Support Sociocracy

Tentative date: [February 4, 11, 18 14.30 UTC](#)

3x 2 hours



Connection is a basic human need, as vital as food and water, yet we live in a culture that does not nurture connection. As a result, much of what we do in relationship to one another is unconscious and out of alignment with our stated values. Imago Relationships theory helps us become conscious of our motivations and behaviors which in itself brings us into better alignment. The tools of Imago Relationships provide the means to live into our best intentions.

Sociocracy provides an excellent structure for working together in a community or organization. It disrupts the competitive patterns of our society and replaces them with equal opportunities for participation. It doesn't always protect us from emotional triggers and unresolved conflict. Adding a few basic skills and practices, both within our sociocracy structures and in preparation for decision making can strengthen our organizations. Paying attention to the relational needs of the group can go beyond getting the work done to growing the connections that nurture us all. In this course we will introduce the basic neurology of relationships, explore some of our unconscious beliefs and practice new skills for connection and communication. We'll shift our mental listening muscle from ready-response to deep receiving and practice using work in pairs to bring a whole group into closer relationship and increased safety.

Get to know a bit about Karen's work in her [cohousing blog](#). See [a video interview with Imago's founders](#).

This class is designed to support you in acquiring badge S4.

Classes

John Buck

Implementation – struggles and strategies

March 11 and March 18, 12:30 both days

2x2 hours



Perhaps, the title should really be "Implementation Adventures in Wonderland,' Authored By The White Rabbit." Why? Implementation means dealing with the complexities of culture change and transformative learning. Because any sociocracy implementation process is complex, you must use methods appropriate for complexity, viz, probes and experiments. There is no handbook or recipe.

In the first session of this two session class, we'll discuss how to find levers for facilitating cultural change, including exploring organizations' formal and informal power structures.

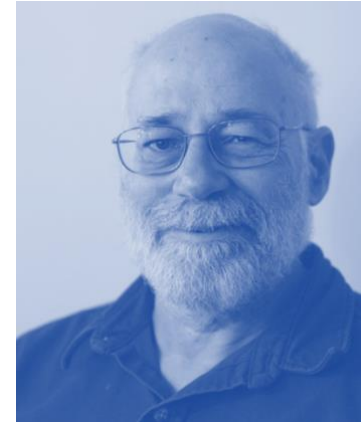
Your homework assignment will be to develop an implementation approach for an organization of your choice and submit it to the workshop's common file for review and discussion during the second session.

Jerry Koch-Gonzalez

Supporting implementation circles

Feb 5, 12:30 UTC

2 hours



Successful implementations are often supported by implementation circles – a circle of members of the organizations that start as a study group and then work towards the formal adoption of sociocracy as a governance framework.

The advantage of implementation circles is that knowledge about sociocracy and skills are spread wider in the organization than with "external" implementation.

In this workshop, we will talk about patterns of successful implementation circles, how to form them, how they might run and what they might do, and how to support the adoption of governance tools in the organization iteratively and from within. We will also talk about lessons learned from experience that point to stumbling blocks for the implementation.

Ted Rau

Objections practice session

Option 1: [Feb 14 9:30 UTC](#)

Option 2: [April 4 12.30 UTC](#)

2.5 hours



This is a practice session! The first 30 minutes, we will look at objections, what they are, how they are defined as well as general information on how to address them and what strategies are for integrating objections. For the rest of the time, we will work through (fake) scenarios and practice objecting and integrating them.

The hidden agenda of this workshop is to leave behind the mindset of “objections are annoying and make things more complicated”. Instead, we want to be playful, soft but clear, curious but focused on the outcome. The visual that comes to me is a playful martial arts move – give me a punch

and I will transform the energy into something productive. This requires letting go of fear and lots of practice. I’d want people to walk away in excitement: *“I am exciting about trying this out – I hope someone objects in the next meeting I facilitate!”*

This class is suited for supporting students of the [Sociocracy Academy](#) in acquiring badge F4).

Sociocracy is about governance. To “do” governance, we need to interact with people. Therefore, effective governance depends on effective communication skills. This session introduces Non-Violent Communication (NVC), an approach to communication that seeks to create the quality of connection among people that supports needs getting met through natural giving. In this session, we explore what that sentence means, for us personally and interpersonally - our feelings, our needs and how we might more effectively contribute to everyone’s needs getting met.

NVC is not something to do at work and not at home. We will work with your personal triggering situation whenever they occur - at home, at work, with partner, relative or colleague.

This class is suited for supporting students of the [Sociocracy Academy](#) in acquiring badge T2, 3 and/or 4).



Jerry Koch-Gonzalez

Introduction to NVC

[May 10 14:30 UTC](#)

2 hours

Gregg Kendrick

Sociocracy in the workplace: What are the unique challenges and opportunities

February 19 and 26, 19.30 UTC both days

2x2 hours

Unlike co-housing communities or associations where members see themselves as equals, workplaces have existing power structures and hierarchies that can make introducing sociocracy challenging. Additionally, there is often a higher sense of risk since some stakeholders have invested money (equity or donations) and there is a high expectation that the delivery of products and services will meet targets and have impact.



In this environment, for those in power, sociocracy can look like “giving up control”, even if they see its virtues of inclusion. And for the staff of the organization, the invitation of

sociocracy to voice concerns and issues, and to take an active role in decision making, can stimulate fear of reprisals.

Despite these challenges, many workplaces have found ways to benefit from sociocracy. In this workshop, we will acknowledge these challenges and look at ways that workplace organizations have successfully implemented sociocracy, either in whole or in part.

Rea Gill

Sociocratic governance: cultivating emotional balance

March 25, April 1, May 6, 20:30 UTC all days

3x2 hours

“Mining our emotions for truth requires as much discipline as mining the senses and the intellect—and at the heart of that discipline is the winnowing of information in community.”

~ Parker Palmer

Through careful investigation of our mental and emotional life and our embodied experience, we can develop superb emotional balance, which would enable us to be aware of our own and others’ emotional behaviors, emotional experiences and emotional triggers as they arise, and most importantly, make wise choices while engaging with emotional experience in our life and in our circles.



By integrating the wisdom traditions of modern psychology, current emotion research, and contemplative practices, these workshops will provide an introduction to and opportunity to practice emotional and contemplative skills. The learning in sessions is cumulative and includes a blend between theory and practice, Q&A opportunities, small group work, homework assignments and homework review. The following are some of the topics and practices that may be covered:

- Emotional Intelligence defined
- Primary behaviors of effective teams, psychological safety & emotional conversations
- Circle meetings as learning space
- Functions & key characteristics of emotions; emotion families and themes; understanding emotional episodes
- Mindfulness practices and emotional balance
- Practices for individual health and communal flourishing

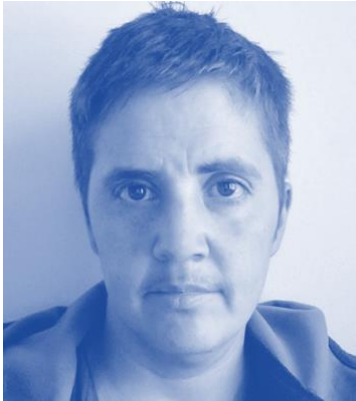
Ted Rau

Writing role descriptions

Option 1: [April 11, 9:00 UTC](#)

Option 2: [April 17, 20.30 UTC](#)

2 hours



We use roles to support tasks getting done without micromanagement. Roles support accountability and ownership, distributed leadership and overall effectiveness.

How can we identify what we can use roles for? How do we go about describing a role? How do we define a role description either alone or collaboratively?

In this session, we will look at the use cases of roles in different sectors, reflect on good uses of roles as well as signs of over-use. We will write role descriptions together and reflect on the process of filling those roles to make sure work gets done well by people

who have the qualifications needed. This session is both conceptual, reflective and practical.

This class is designed to support you in acquiring badge S4.

Jerry Koch-Gonzalez

Designing circle structures

Option 1: [February 19, 12.30 UTC](#)

Option 2: [May 9, 9:00 UTC](#)

2 hours

What's a good way of coming up with a circle structure for an organization? We start with the aims and design from there. We keep in mind aims/domains, linking, group size, roles,...

In the first 30 minutes, there will be a presentation with quick Q&A. In the 45 minutes following that intro, we will practice in silent work/in small groups. Every member will present their organizational structure and get feedback.

This class is designed to support you in acquiring badge S2.



Jerry Koch-Gonzalez

Complex elections

March 12 20:30 UTC

2 hours



Sociocratic elections are simple but we might experience situations where we have to adjust the format. The better we understand why elections are held the way they are, the more easily we can adapt without losing the qualities the election process brings.

Examples of 'complex' elections are:

- Filling different roles at the same time.
- Selection process in a group too big for rounds.
- Selections when two people are equally supported for the role.
- Elections where we select options instead of people; e.g. how to determine membership fees using the election process, or how to assign different workshops into

different time slots.

- Dealing with objections in the selection process.

In this session, we highlight the different phases of the selection process and what their qualities are. Then we will try out some of the formats in small groups.

Graham Boyd

Self-governance and ownership

April 26 and May 3, 9:00 UTC both days

2x2 hours



Navigating by tension works best if all types of tension and conflict are fully included. In organizations, we find three primary sources of tension and conflict:

1. Human. Conflict and tensions within each of us, and between us as meaning-making beings.
2. Work. The conflict between our roles, accountabilities independent of any specific human energizing the role.
3. Stakeholder. The conflict between different stakeholders, such as investors, staff, customers, suppliers, members, cities, the planet.

We need a way to parse any specific tension into its components, and then have a powerful way of navigating according to each component.

1. Human. Vertical developmental pattern language, e.g. NVC, Immunity to change, the Evolutesix Adaptive Way etc.
2. Work. Sociocracies are superb ways of harnessing the value of conflict to navigate by.
3. Stakeholder. Free FairShares legal entities.

Negative experiences with Sociocracy, Holacracy etc. we believe are due to tension components that can only be processed at the human/stakeholder levels.

In these two sessions we will introduce the Free (or self-owning) FairShares legal structure.

- Because some (e.g. investors) stakeholders have the power to vote, but others have zero power, you cannot effectively navigate into the future.
- Because some (e.g. investors) get all the benefits (capital gain, dividends)
- Because it does not own itself, it cannot have an evolutionary purpose of its own. Company ownership is incompatible with self-governance as a whole.

Each of the 2 two-hour sessions will be ca. 30 min input and 90 min discussion. Depending on interest and demand, we will then offer in-depth workshops and support for those who want to implement this

NVC to support facilitation

May 24 14:30 UTC

2 hours

In teams, we want to be sure that we are understood and that our needs are taken into consideration and held with care. How can we do that while at the same time get things done efficiently?

Non-Violent Communication (NVC)

- o offers a shift from creativity-killing criticism and blame to empathic understanding, curiosity and generative thinking,
- o improves our connection in meetings and
- o helps us make better policy.

NVC is an exploration of feelings and needs that arise when triggered by an event and moving towards action.

After a brief presentation, we will name good moments to use these new skills. We will practice in small groups and then reflect on our new learning.

This class is suited for supporting students of the **Sociocracy Academy** in acquiring badge T2, 3 and/or 4).



First Last Name

Additional workshops!

To be announced
n hours



We're leaving some room in the budget to add classes where students, mentors, teachers or administration see a need or have an idea. This could be repeating a workshop at a different time zone, extending a workshop or adding a workshop taught by a student or an outside teacher.

We encourage students to give feedback and to carry their information to the Academy General Circle. Send an email to academy@sociocracyforall.org to get the ball rolling.



Your SoFA Circle

Learning by working in a SoFA circle

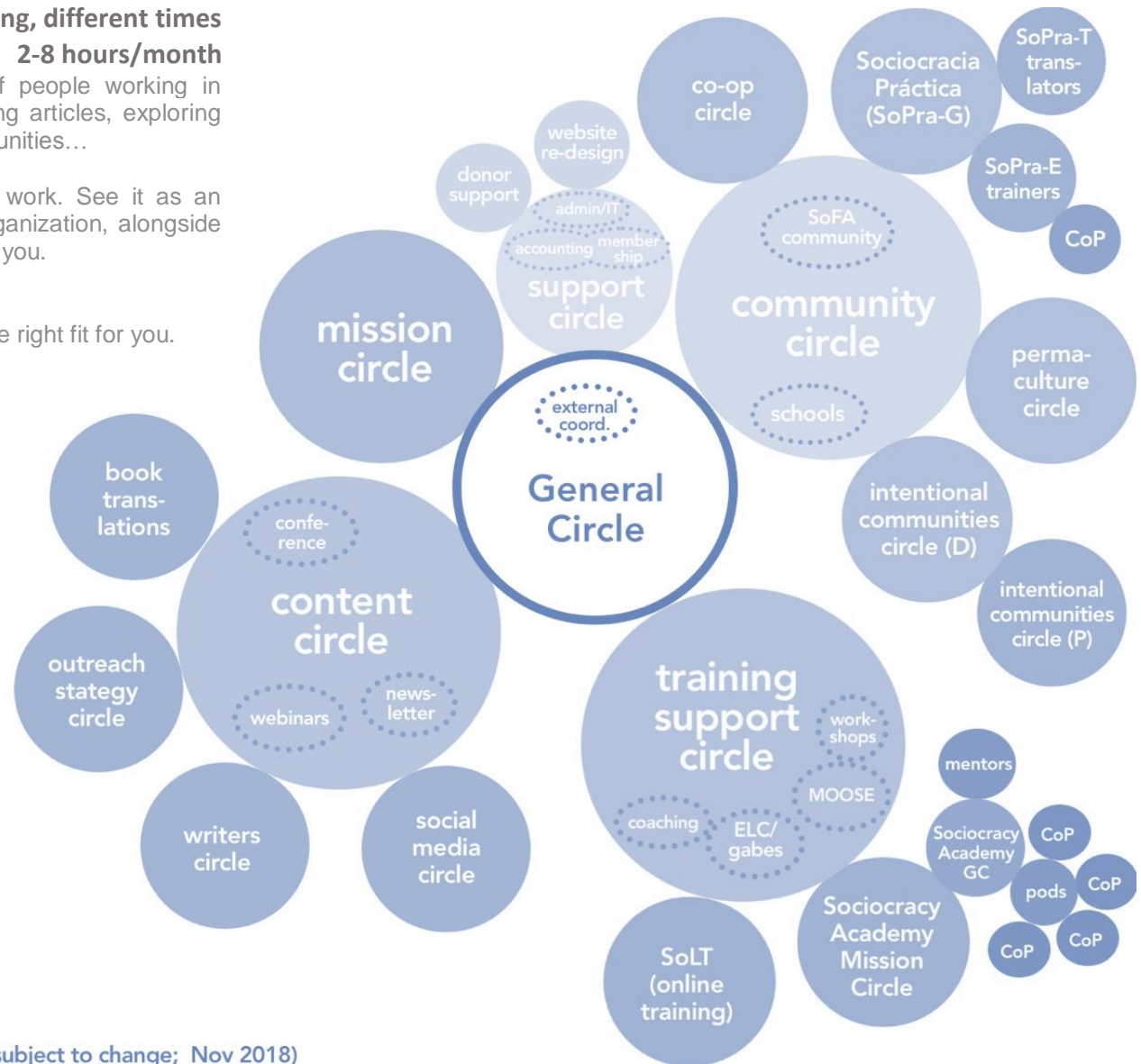
Ongoing, different times

2-8 hours/month

SoFA is more than the Academy. There are dozens of people working in different domains – translating, putting on webinars, writing articles, exploring sociocracy in cooperatives, permaculture, intentional communities...

Join a SoFA circle and learn and contribute in ongoing work. See it as an internship that you get for free internship in a working organization, alongside with your learning. SoFA is a big playground just waiting for you.

Find out from SoFA membership coordinator (membership@sociocracyforall.org) what circle might be the right fit for you.



(subject to change; Nov 2018)