

**Inland Northwest  
Unitarian Universalist  
Community (INUUC)**

# **Sociocracy Presentation**

December 3rd, 2022



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## **Linda Moulder**

We are a new congregation, forming in July 2020, and adopted Sociocracy (or Dynamic Governance, as we call it) almost immediately. I had the privilege of serving as the first elected Board (Governing Circle) president last year. The first thing the Board did, was read two books, Many Voices One Song by Ted Rau and Jerry Koch-Gonzales and Governance and Ministry by Dan Hotchkiss and they gave us a foundation to move forward.

I want to focus my time with you on how the Board blended sociocracy and Hotchkiss's model of church governance. Last year, the Board worked to get organized. We developed board policies, adapted from Hotchkiss with a sociocratic twist, we created an organizational chart, and we worked with the church circles (we have about 15) to clarify their areas of responsibilities, (or domains), missions and aims.

Both sociocracy and Hotchkiss stress the importance of organizational mission in the work of the Board. Rau and Koch-Gonzales call their Board a Mission Circle and Hotchkiss says that the Board's job is to represent the mission of the church. So, the mission should be the focus of the Board in both models.

Hotchkiss talks about "Life after Governance Change". He discusses the Board's annual cycle of planning and evaluation and I will highlight a couple of his ideas.

He proposes creating 2-3 Open Questions about the Church's future at their annual retreat. Board members then discuss these questions with the congregation several times during the year at a variety of gatherings. This process connects the congregation with the Board's work and provides a deep communication process. And, in sociocracy, communication is key! The open questions can be tied to your mission. Take a phrase and ask your congregation how they think the church should make that phrase alive and real this next year?

Hotchkiss also suggests creating an annual Vision of Ministry. This is an annual planning session with staff and the two general circles, to develop 2-3 goals for the coming year, again relating to Church mission. We did this in February last year, prior to our budgeting process, so the congregation knew what we needed to fund for the upcoming year. Tied to the Vision of Ministry is an annual Ministry Evaluation which summarizes the Church's success or difficulties in achieving the prior year's Vision of Ministry, thus providing regular evaluation process, which is also a key sociocracy principle.

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## **Kathryn Alexander**

We were very lucky because we had left the old church and we were clear about things that had caused problems there that we didn't want to carry forward. One of the reasons we chose sociocracy is because power is decentralized. This means that no one can control the whole show, and that was very important to us.

Sociocracy also keeps leadership fresh and inclusive. This means that people are constantly encouraged to step up and take leadership and not by being in a circle, but to take a larger role, to become a facilitator, leader, secretary or delegate which really allows them to shine.

This, form of governance, only works if people participate. It's clear that you must be involved in a circle in order to get things done, you have to work with others. It's very empowering for people because you can start a circle at any time on any subject, and really make your own place in the church fairly easily. We are working to develop a clear process for starting circles to encourage engagement.

When we started, we had some words that were very important to us, and we have a word cloud to share with you. Some of these words are; radically inclusive, conventual, intergenerational, nonhierarchical, and welcoming to all; and we really felt sociocracy gave us all of that.

What we're leaning into and working on still are; cross circle communications for instance it's still unclear what decisions need more communication between other circles or even a whole church. There are delegates to circles who don't always understand their role, and don't always fully participate in both circles. The delegate function is not just a reporting function, where you take things back and forth informationally, that's important, but it's really being involved in each circle with the perspective of both circles and the whole church, in your head. That it's very rich place to be, and we're still learning how to do that.

It's traditional that in the domain of a circle they are empowered to make decisions in that domain. But sometimes, what one circle does influences or impacts another circle, and we still have not really figured out how to catch those things early enough to create a process so that those decision are not a surprise to people. We're working on understanding more deeply each circle's domain and what that means. We are learning it can be things that you really don't know about in advance, so the delegates need to keep both circle hats on at meetings. They need to pay attention and ask questions like, "Is this totally our domain? Who else does it impact? And how do we address that impact?"

Some circles find it awkward to do the consent process, especially if they're small. I think in picking roles it has been just amazing. You rarely hear people say good things about you. We just don't do that in our culture, but in the consent process, when you have to say why you're picking somebody for something, it's quite wonderful for each person to hear that other people appreciate who they are, that's a very rich piece.

We still are working on getting all the church members to have a clearer understanding of sociocracy, especially people who don't participate that much.

One of the real richness will be the institutionalizing of the consent process. Having a definite time to say you have different thoughts, I think is really, really important. As we lean into that and begin to become more skillful at that, the governance process will become very much stronger.

Thank you

**Kathryn Alexander**

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## **Erin Fitzgerald**

I want to share with you some of the key concepts that I find are particularly enticing for those who are new to this governance system.

Consent – is defined as no objection. An individual consents to a proposed decision when all their reasoned objections have been resolved. If no objections are raised, then consent is assumed.

We ask is it “good enough for now and safe enough to try”. An objection is only raised when the decision that is proposed does not move us toward mission and/or is dangerous for the institution. This concept greatly increases our willingness to try new ways of working together. The stakes are lowered in our minds because we know that we can change the way that we are working together or decisions that we have made anytime. As a matter of fact, the governance system requires that we look at any policy at a predetermined time. No decision is set in stone.

Operations units are semi-autonomous and self-organizing. They set the policies that govern their areas of responsibility or their domains. They maintain their own memory system in logbooks, assume responsibility for their own development, and can generate new circles with different aims.

In our congregation this means that folks have a great deal of autonomy in their circle’s area of responsibility/domain and makes it much harder for the institution to fall into an autocratic way of governing.

I also find the election of leadership for each circle to be a more inclusive process. During the process we ask that each person nominate someone for a particular leadership position and articulate the reasons that they are nominating them. People are also able to nominate themselves. We then have a round to see if anyone has changed their mind. If a particular candidate is not clear, then they engage in a discussion and each nominee can indicate if they are willing to accept the nomination. In most cases they have reached a conclusion but if not then they would move on to a discussion round until consent is reached.

I have now led several leadership selections processes and each one has been surprisingly pleasant. People have walked away feeling good about the process and may have learned how much they are valued in their circle.

These are just three of the concepts in Dynamic Governance that I especially enjoy, there are many others but I must be respectful of the time that is available.

**Erin Fitzgerald**

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## **Scott Fitzgerald**

During the process of adopting and implementing Sociocracy we have found a few issues that we are working on:

### **First, we know we are not done with implementation.**

Full implementation is going to take a few years and we need to build processes to make sure that our implementation is thorough, complete and ongoing. We know not everyone in our community members was able to attend every meeting; have not read all the newsletters and announcements; and likely have not read up on Sociocracy on their own. Or they may have not been paying attention or did not fully understand the information presented. We're two years into this process we are still encountering people who are unclear or confused on aspects of how the Sociocracy model works. Our Leadership Development Circle is tasked with making sure this continued training and implementation is happening. It is crucial that some Circle is specifically charged with this important task!

### **Additionally, communication and coordination are key.**

One challenge of Sociocracy is the risk of Circles operating in isolation or at cross-purposes. Some people are expressing a sense of not knowing what is going on in the community, and we have also had instances of separate Circles simultaneously working on overlapping projects. We are currently developing a Coordinating Circle to help address these issues. And we are working on mechanisms to ensure Circles are communicating effectively with other circles and with the rest of the community. This includes newsletter articles and information posted on our website. We are also in the process of developing a Community Directory that will include information about all of our Circles and the work they are doing, as well as each Circle's mission, aims and domain. This directory will be provided to all community members and updated annually.

### **The Bigger Picture**

Regardless of how well any governance model is implemented and regardless of how well communication and coordination are initially structured, eventually, without ongoing maintenance, the governance model may start to break down. New people will come into the community, older members may leave or step back from leadership roles. People forget and fall back into old bad habits. We are just starting to work on some mechanisms for ensuring that our governance model is constantly and continually monitored and maintained. We see a clear need for some circle to be specifically tasked with the responsibility for this ongoing monitoring and assessing, on a high level, of how our governing model is working—and working on solutions to any observed issues or concerns.

This process of continually and constantly assessing and improving the implementation, communication and coordination of our governance model is rooted in the idea of “good enough for now safe enough to try”—Nothing must be set in stone. All policies, practices and procedures need to be regularly examined, updated and revised.

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## INUUC Word Cloud

This is the Word Cloud we created as a group when we first started the process of forming our new UU community. We have been intentional in referring back to this frequently as we do our work



# INUUC Org Chart

This is the organizational chart we developed after our first annual meeting. We will be updating and revising this every year.

## INUUC ORGANIZATIONAL CHART

