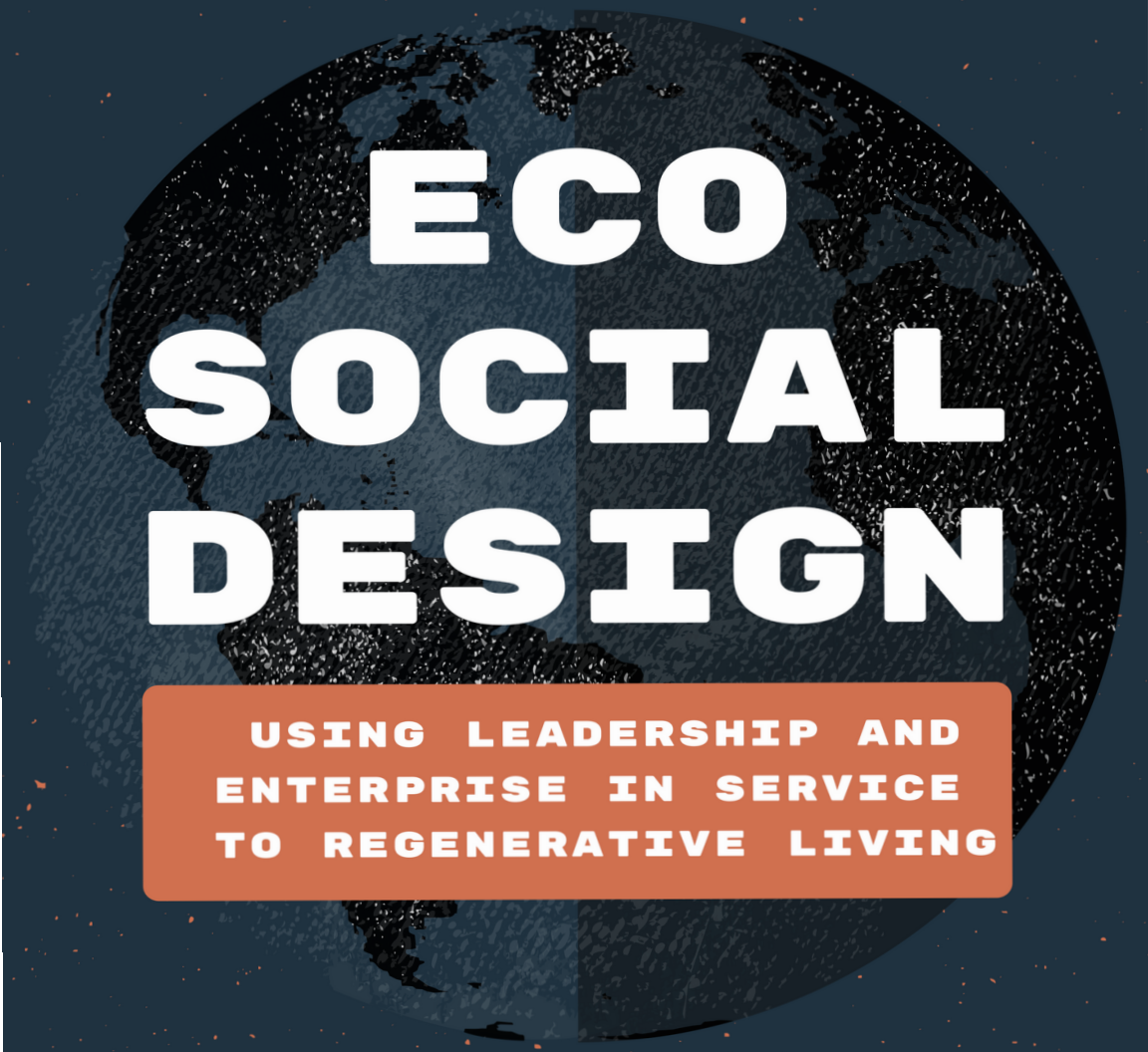
From the co-originator

of the Permaculture Association of Britain and Gaia University.



ECO SOCIAL DESIGN

USING LEADERSHIP AND ENTERPRISE IN SERVICE TO REGENERATIVE LIVING

By Andrew Langford

EcoSocial Design

Using Leadership and Enterprise in Service to Regenerative Living

Andrew Langford

This version was published on 2019-01-08



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To my adult children, Amy and Joseph and all members of their generation and those that follow.

My take is that elders like me are having a relatively 'easy' ride being as we are at the beginnings of 'the long emergency' of climate chaos. The challenges to come are bound to grow ever more taxing and major disruption is certain. Raising a family under these difficult circumstances will require deep courage and fortitude similar to that shown by my parent's generation as they tumbled through the years of World War 2 and the austere aftermath of reconstruction.

However, this time the 'end' to the chaos is likely to be generations away. I am trusting that this book will provide you with some idea of the networks and tools that can be used now to mobilize self and others to generate constructive actions that can at least limit the scale of coming damages. These tools can also help with building closely connected and resilient communities that will be critical to survival. I am also advocating for the imminent adoption of robust methods for dealing with descents into and recovery from hopelessness as once we know we can recover from hopelessness it becomes increasingly possible to risk the emotional fall-out that might come from facing the facts. As Eric, your paternal grandfather used to say 'preparation is nine-tenths of the job …' and if this book can nudge you deeper into preparing then it has served its purpose.

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Introduction

Much of the content in the chapters that follow, has been gathered from a wide range of informal sources in the movements that might be called (to use an Arturo Escobar[1] term) *transition dialogues* These include, amongst others, the intersecting worlds of permaculture design, ecovillage development, transition initiatives, and bioregional congresses, although this collection is not pretending to be a complete representation of all these dialogues.

Further, the participatory fields of open conferencing and world cafés, the clearing fields of compassionate communication and re-evaluation counseling also play a part. Add to these ways of thinking the modified ideas of spiral dynamics, of integral theory, of the value of experiential learning, of story-telling of the auto-ethnographic variety, pluralism and complexity theory to round out the boundless package and we have almost defined the scope of the big picture thinking in these transition dialogues. These dialogues are seeking to articulate a functional and inspirational worldview suited to the new conditions of certain climate disruption and the inevitable ensuing social chaos.

It is a wide-ranging curriculum that assumes, as a kind of prerequisite, a practitioner level knowledge of permaculture design. Practicing permaculture is our favored method for reconnecting ourselves with nature especially as it holds to so-called deep green ethics - Care of the Earth, Care of People and Limits to Consumption and Population. These essential ethics go past an anthropocentric viewpoint in favor of a web-of-life perspective: humans are part of

[1] Active processes include the Gaia U ArCEA reading and critiquing method (see Scholar Skills in this book), being part of a learning and unlearning community that has liberation of intelligences on the agenda, developing a more informed consciousness around the Patrix and using tools like Re-evaluation Counseling to accurately and effectively seek out Patrix patterns and strip them of their power.

this web of life, not separate from it, and so, if immediate human interests clash with ecosystem interests, we strive to give the latter priority. *If you don't have a grounded knowledge of permaculture design find a permaculture design course and get it now and start practicing it.*

However, the topics are chosen to extend beyond the more common Care of the Earth focus of the now-classic permaculture design course (PDC). Our principle contributors (see Acknowledgments for details) have all taken their permaculture design training out into the world and designed, consulted, practiced, transitioned and taught the field extensively. From this experience they have noted the 'what's needed to expand the range of actions' beyond the land use focus of the classic PDC and, that's what you'll find outlined in this eBook. There is more to it, of course, and yet this collection goes far and wide.

We have been using this curriculum for our Gaia U Certificate in Ecosocial Design (Cert.ESD) for about 8 years now. It shifts and flexes every time, sometimes through gentle tweaking and sometimes by more radical excisions and inclusions. Our two cohorts per year of student associates see to it that we continue to be relevant and also conscious of unintended Patrix intrusions. The Patrix is a Gaia U term coined as a shorthand for the patriarchal matrix of oppressions dominant in many of our cultures). And, as much of the content is to do with *how to do world change*, we continue to do world change work ourselves to stay sharp.

Most recently, due to our partnership with the Transition Network out of the UK, our content has been thoroughly reviewed by Tom Henfrey of the Schumacher Institute in Bristol, England. Tom describes himself as a 'recovering academic,' and we are grateful to have had his skilled academic eye rove over our efforts (we pass). Tom notes that the content is dense, to the point and generally without fluff. Thus the content does not divert the reader from taking intelligent action to change the world by swamping them with unfeasible amounts of reading and references that, more often

than not, serve to confuse and over-complicate the issues.

In a Gaia U program, a student associate's time is mostly focused on being effective in their chosen world change projects. That is, an associate designs their own program and uses their projects-in-context to guide them towards their learning and unlearning. This self-direction is a liberation, and yet, it may not come easily. We all have years of conforming to other peoples agendas, especially around what should be learned. Overcoming this ingrained, other-directed (Patrix derived) compulsion takes time, persistent effort and commitment to honest self-observation, all supported by skilled mentoring. The mentoring comes from Advisors who are also walking the path of self-directed action for world-change.

The Certificate in Ecosocial Design is (ironically, given the above statement about self-direction), a scheduled and structured piece of work. It is designed to provide the mutually held, common language for the deep and generative learning and unlearning conversations between peers and mentors. See the table of contents[2] here.

A final aspect of the context of the content is to know that it is designed to accompany a 6 month long, twice a month series of online learning community gather-ins. This regular and sustained voice to voice, person to person and cross-cultural contact is an outstanding experience of the Gaia U context as we witness each others' transitions and see how each one of us generates meaning from the content. This learning community is continually acquiring new members and its continuity over the years keeps it available as an ongoing source of support for the world changers that make up the Gaia U Associate and Alumni body.

General functions of the Cert ESD

A call to good thinking, good design and good action

Our abilities to think well and to bring our good thinking into action through design are affected by many factors, the least of

[2] http://gaiauniversity.org/ecosocial-design/

which is conventional 'intelligence'. At Gaia U we understand that most everyone has the necessary brain power to comprehend the current state of the world enough to a) critique the current situation and b) design and activate strategies to transition our self, our communities and, ultimately, our societies to an ecosocial future.

If we experience challenges with either the critique phase or the design & action phase, the Gaia U approach is to suspect one of the following may be true (feel free to add your own observations to the list below):

No one has ever explained how to do 'thinking' in a way that makes sense to us,

Most of the thinking we have been asked to do has not been relevant to us and has often been propaganda for the powerful,

We are not confident that our own thinking is as good as other people's

When our own thinking is different from that of the dominant culture we risk being called 'crazy' or 'unrealistic\'

It is not up to us to redesign and act for a better society; there are other people much better qualified than us to do that

Just coping with survival in everyday life is enough to keep us busy. We don't have the luxury of 'time to think\'.

The world (or at least the layer made by humans) is too complicated/complex for us to understand so we'd best leave it to the experts

The situation is too urgent to stop 'doing' and, instead, to make time for thinking

These are all impediments to good thinking, good design and good action. The Gaia U Cert.ESD is aimed at reducing the effect of these limitations. To do this, we use a blend of tools that help us do integrative work in the intersecting realms of technique, consciousness raising, emotional literacy and confident agency.

Integrative means joining all these realms together to make sense of the whole

Work means applying our minds and bodies to the essential ecosocial transformation coming up, with persistence and timeliness

Intersecting means noticing that all these realms affect each other

Technique means developing agile competence with methods that help us deconstruct, reconstruct, critique and expand other people's thinking as well as our own

Consciousness raising means learning to use critical frameworks that help us see the patriarchal matrix of oppression (the Patrix) that shapes our current cultures

Emotional literacy means strengthening our own capacity to recover from the shocks of the past and the present to prepare for the shocks of the future (i.e., climate chaos) without ceding our power

Confident agency means designing and acting for our own good, the good of others and the good of all life on Earth

The Cert. ESD provides us with multiple opportunities to practice doing integrative ecosocial work within the supportive context of an online community of un/learners that includes both peers and professionals.

Expect to practice, expect to engage, expect to change.

Practice and Purpose

Witnessing this process over the years, both in ourselves and our Associates, has shown us that purposeful, practice-oriented engagement is a transformative and effective process. Initially, this means committing to allocate the time and effort required for each Element (1 Element = 2 weeks) to:

Week 1:

Read the content, do deconstruction and reconstruction in order to prepare questions and answers for the webinars

Add your thoughts and reflections about the content to your journal

Attend the webinars that are hosted at the end of the first week (live is best for juicy peer-to-peer interaction; recordings are posted usually within 48 hours)

Week 2:

Complete and post activities as requested

Continue active participation in the un/learning community through forum postings

Post final reflections, regards your experience and critique of/gratitude for the element

The activities are intended to be light, multifunctional to-dos. The focus is on practicing using the tools and techniques and not on generating a large quantity of writing. Ten lines of thoughtful reflection trump both a rambling essay and no reflection at all. You can also reuse these responses later by integrating them with the extended pieces you will later generate for credit known as Output Packets. For example, an outline of your life stories made in the early Elements can show up as the structure for a more detailed narrative in your Life and Career Review (an Output Packet) that you develop starting after about 5 months.

If making the essential space for the above list is an unrealistic promise for you to make, then you are probably better off delaying your start date with us until you have cleared your calendar.

Time Allocation

We recommend an average time commitment of 8 hours a week with occasional 12 hour weeks to get ahead and make the space

for those inevitable and rare 4-hour contingency weeks when the rest of life presses in. You will need to actively defend your 'study time' against other people and projects that demand your time and, possibly, your own patterns of creating diversion dramas in your life.

This allocation of time/defense of space issue is, we note, a key area of un/learning for most world changers, and we address it continuously throughout the course by asking you to renew your promises around engagement from time to time.

Un/Learning

A powerful notion in Gaia U is un/learning. It has to do with noticing that much of the current received wisdom about, for example, people, nature, economics and 'the others' is riddled with misinformation. This does not serve us well. We offer multiple 'liberating' structures that help us see the misinformation and understand its function. This enables us to actively un/learn the ways of thinking that are driving our conventional cultures towards collapse.

A Distinct Absence of Stuffy Academics

It may help to know that Gaia U is not seeking to emulate the conventional Academy, nor is it staffed entirely by people with extensive, conventional academic backgrounds. However, we do much appreciate scholarship, in our case defined as a critique-full gathering of thinking and attitudes that enable us to act effectively for ecosocial regeneration. We seek to assist you in developing these skills.

Gaia U is home to the thoughtful artisan, the ethical shop-keeper, the ecological campesino, the wholistic practitioner, the open-source manufacturer, the permaculture designer and other disrup-

tors who often come from the so-called 'lower middle-class '. We are more conjoined in spirit with our sisters and brothers of the working class than the elites of the coordinator and owning classes.

Thus you won't find yourself cowed by 'brilliant theorists' or 'towering intellects'. Rather, you'll find geniuses of ordinary intellect working together to bring about an ecosocial future through strategic, thoughtful, life-long actions.

Extrinsic versus Intrinsic Motivation

Another common feature of members in the Gaia U community is that we are drawn more to generating communities of resilience and autonomy and less attracted to dancing to the tunes of money-eyed pipers. This means that we generally expect to create our own livelihood through ecosocially congruent activity. Whilst 'good' jobs in the mainstream can be a comfortable delight, they are rarely a primary goal. We support each other to develop the necessary courage and skills for this artisan journey throughout the Cert. ESD and beyond.

Digital Competency

During the course, we will ask you to work at a wide range of computing tasks, many of which require an internet connection. This is an opportunity for you to develop very useful digital 'chops' ('chops' are also called skill-flexes in Gaia U) that can serve you well beyond the bounds of Gaia U.

Your time in Gaia U will be greatly enhanced if you are pleased to be doing this. If you are already fed up with the amount of time you spend online or in front of your computer, then you need to either triage your online life to make space for Gaia U or get your education some other way. We are an online outfit, so online you must go (little and often is good).

We recommend that you make space for at least 4 online sessions a week as doing everything in one session courts stress and disaster. Be realistic about this.

A Summary of Promises

By signing up for the Cert. ESD you are promising to:

Be online at least 4 times a week (and learn to troubleshoot your connection)

Commit 8 hours a week on average to your Gaia U work

Complete the readings before the webinar at the end of Week 1 in each Element

Complete activities and forum posting for each element by the end of the Element

An Ecology of Websites

Note that we use minimally three websites to handle learning systems, portfolios and creative exchange. You will need log-ins and passwords for each of these and keep these in a secure, accessible place. Each of our sites has an automatic 'lost password' function that you can use to reset a password should you need to.

How our content is presented

Illustrated text is our favorite

We use text (with illustrations) as our primary communication tool. Illustrated text, as compared to audio and video, has many advantages.

For us, the authors, it is the *easiest form to edit and update*. That allows us the keep the content fresh, to add in thinking from new and relevant developments and, importantly, to throw out old materials that no longer work well.

For you, the reader, it has a similar advantage - *it is easy to scan* (a form of 'editing '). Scanning allows you to pick out the parts you want to spend more time with and reject the parts you don't find interesting (maybe you already know enough about that part of the topic or, you don't want to delve into the detail at this time). You have a lot of power to be selective. Selecting and scanning are much harder with audio and video.

And, because we work worldwide, many of our student associates are using mobile phones with data plans to access our content - in many countries this way of connecting to the internet is expensive and one 20 minute video might soak up a month's worth of data.

Text as a graphic

As authors, we also know that it helps when we can treat text as a graphic item.

Therefore we do our best to:

- Write short pages with short lines

- Leave plenty of white space

- Use simple fonts in large sizes

Now and again we:

- Add emphasis by formatting words and phrases in *italics* and **bold**

- Make use of lists and word maps

- Use images where these will help

Pages make 'books'

Then we assemble a number of these pages into short 'books.' We let you know the number of pages in each book by adding a number to the title. It is a rare book that exceeds 6 pages.

Books make elements

The content of each element in the Cert. ESD (a two-week 'module') is contained in a number of these books.

Reading for information

This means that being able to * read for the purposes of gathering and critiquing information * is an important skill for you to develop. However, you do not have to be fluent from the beginning as we provide you with plenty of opportunities to practice.

To this effect we promote an approach we call ArCeA which stands for *Active reading, Critical examination, and imaging Action.* You *do need to be willing* to engage with this skill-building process.

The VAK myth

Some people would prefer to watch video for content and maybe claim that this is appropriate because they are 'visual' learners for whom text is difficult.

Still others lay claim to being 'kinesthetic' learners, who must approach new learning through embodied action, by doing things and, for them, text is inadequate, and videos are only a little better.

The first thing to know is that the idea that learners are 'visual' or 'auditory' or 'kinesthetic' (sometimes known as the VAK theory) is just that, an idea (or, we could say, if we were using more formal language, a conjecture). It is not an undisputed theory. Indeed there is plenty of evidence to show that it is not true ***.

Flexing our skills

At Gaia U we think that, whilst we may have *preferences* for one form of presentation over another, we can, with effort, learn to flex our skills *to use all forms*. Especially if we work at recovering from any learning distresses we might have (such as those we might have collected around reading and writing due to clumsy schooling earlier in life).

Our logic is that it is better to work at recovering from distress and not continue to limit our ability to forage for content only to Youtube or to similar popular repositories although, as the ArCeA method works well for processing content from videos, talks, and lectures as well as from readings these are not off-limits by any means.

A key question for you

A question for you: are you willing to invest significant effort into becoming a fluent user of ArCeA for processing illustrated text-based materials?

How to do due diligence on content

Disbelieve!

It is potent and important for you to hold an attitude of healthy skepticism (disbelief) regarding any of the materials, content, opinions, thinking styles and resources we put into our eLearning courses at Gaia U.

Whilst we do our very best to be carefully critical, thoughtfully analytical, true to our own experience, aware of how things go for other people and so on, we may accidentally (and, who knows, deliberately: -))) deliver misinformation and propaganda.

Crosscheck!

Therefore check it out! If our way of thinking does not tally with yours or with the way of thinking of people you trust then let's discuss it. We can decide to differ and hold to a creative tension if that helps!

But relax!

Oh, and then there is the question of 'does it really matter'. By which we mean that there are differences that *do* matter and some that *don't*. Together we'll do our best not to spend a good deal of energy on debating differences that don't make much of a difference.

Become an active self-forager

The idea

Permaculture design proposes that any system that allows animals and/or people to collect their food from the source themselves is a system that is likely to be energetically efficient.

Examples are grass-fed beef rather than stall/grain fed and 'Pick-your-Own' fruit farms.

In these approaches, the animals and people are "self-foraging". That is, they harvest their own food in situ.

We'd like you to practice self-foraging as an un/learner.

How to practice

For example, if ever we use ideas, concepts and words you don't understand please do the following: -

self-forage for explanations and word-meanings,

take a think and listen with another person to tease out what you do and don't understand ready to ask focused questions of your advisors during webinars and

guess - it is quite all right to allow meanings to emerge over time, so it is not necessary to understand everything, all of the time.

Self-foraging can involve the internet *and* other people - using privacy oriented search engines on the web such as DuckDuckGo[3], for example, as well as asking around amongst people who you might expect to know.

Due diligence again

However, it is crucial to remember that you should always apply due diligence. Do this by giving all content the ArCeA treatment!

- Acknowledgements

An enterprise such as this book involves contributions and critique from many people although this final version has been assembled and written by me, Andrew Langford. Every writer needs multiple eyes on their work, firstly to edit the writing itself, to cut out the fluff, the repetition, and the overlong sentences. Jane Hera was my first writing tutor and mentor, and I am grateful for her patience and courage in that respect. A beginning writer is not necessarily an easy craftsperson to critique!

Subsequently, various colleagues have contributed their feedback and thinking whilst knocking off a few more corners. I am especially grateful to Alejandra Liora Adler, my wife and partner in Gaia U who has been a constant mentor and supporter in the development of the thinking presented here. Other minds of note belong to Jennifer English, Valerie Seitz, Declan Kennedy, Ethan Roland, Gregory Landua, Patrick Gibbs and Bob Randall. Without their help, this work would be much weaker and far less useful.

Finally, I am indebted to Rhonda Baird, Senior Editor of The Permaculture Design Magazine, who applied her considerable skills to the large task of getting the manuscript prepared for publication. Rhonda's timely interventions and calm persistence have been critical to the mission!

Many thanks to all!

[3] https://duckduckgo.com/

Chapter 1: Creating Regenerative Livelihoods

Welcome to our deeper dive into Creating Regenerative Livelihoods! The content here extends the content we delivered in our free course 'Regenerative Livelihoods by Design'. There is some repetition too and, we like to do that with especially potent content, as a way of revising it after you have had some time for reflection.

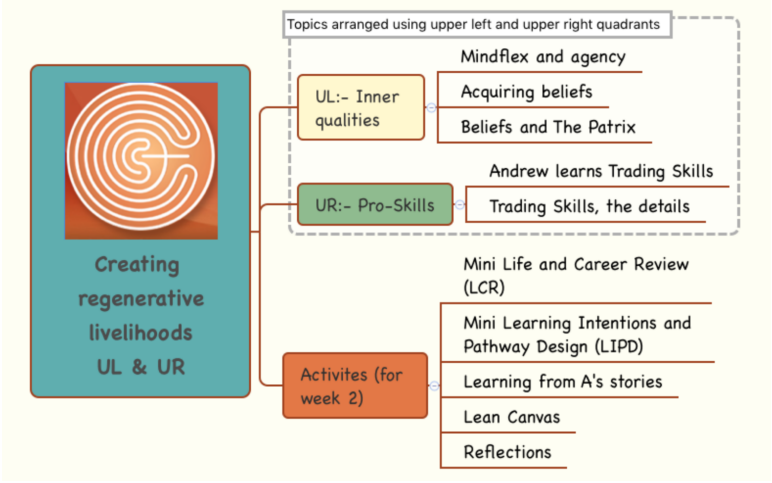
We are glad to have you here and thrilled that you are ready to explore joining the ever-growing band of dynamic and proactive people who understand that creating our own livelihoods, congruent with values and goals to do with ecological and social regeneration, is good for the planet, good for society and good for ourselves.

Course Navigation

This Course, along with all others, is organized into Lessons. Each Lesson is broken up into Topics usually one page long. The online version includes activities designed to give you practice using the constructs whilst giving your colleagues and us the opportunity to offer you some feedback and riff off your contributions.

The following graphic shows the basic structure of the course, which is designed around our version of a model from Integral Theory. We will learn more about this model later, which consists of four quadrants, but for now you can note that this first Course focuses on the top two quadrants: UL (upper left, or the individual interior - what we call 'inner qualities') and UR (upper right, or the individual exterior - what we call 'Pro[fessional] Skills).

Don't worry too much about what all that means if this is the first time you're coming across this model. For now, have a quick look at the structure, so you know what to expect:



AQ model

Webinars for Course Participants

An additional and delightful aspect of this Course for enrolled participants are our famous participatory webinars. During these, we'll run through some aspects of the core content, add some new thinking, answer any questions you have and hear your reflections on the content.

Slack Workspace for Course Participants

We make extensive use of Slack as an instant messaging tool for day to day communications between Gaia U team members and enrolled participants. The Slack Workspace also receives instant notifications whenever a participant contributes a response to any

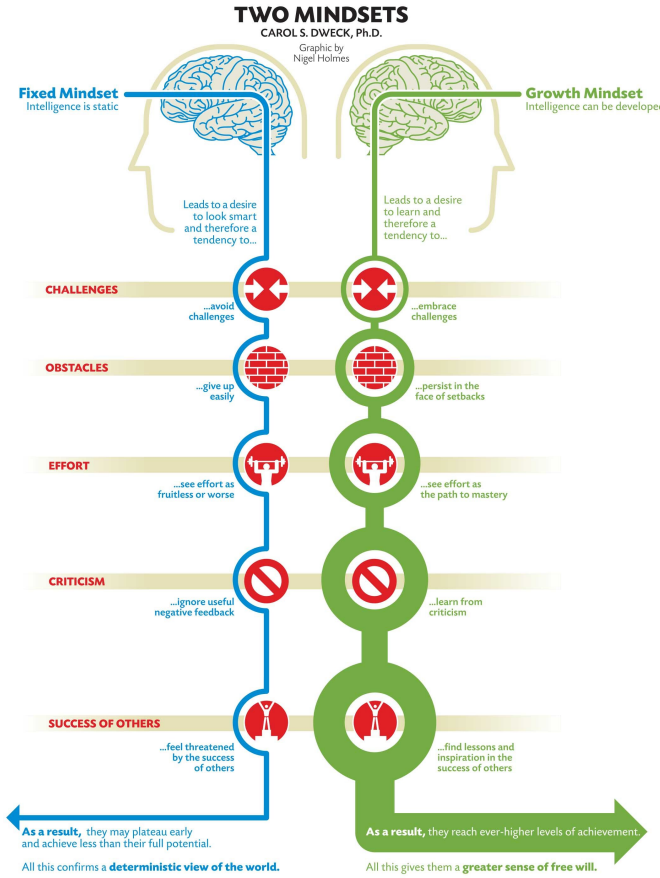
of the activities. This way everybody can see the action without needing to sign into a website. Slack also enables all participants to direct message each other for any purpose including finding think and listen buddies.

It is through the use of Slack, the webinars and the Gaia U website that we build the learning (and unlearning) community. A great deal of extra value emerges through these interactions.

Inner Qualities

Mind Flex and Agency

Research by Carol Dweck has uncovered details about two poles of belief about intelligences. At one extreme a person believes their intelligence is singular, limited and fixed. At the other extreme, a person knows their intelligences to be plural, boundless and open to development. The first she calls a **fixed mindset** and the second a **growth mindset**.
The following graphic summarizes the tendencies arising from these two poles:



Growth vs. Fixed mindset. Image: Nigel Holmes, used with permission.

We believe a growth mindset is much more potent for world change and regenerative enterprise than a fixed mindset. It follows too, that societies comprised of members with flexible, growing intelligences, are much more likely to resolve the complexities of transitioning to ecosocial cultures.

Dweck's popular 2006 book *Mindset: the New Psychology of Success*

is full of stories that illustrate the research projects made by Carol and her teams over the years. It is a worthwhile read. The text explores the implications of the two poles of belief in a wide range of contexts including relationships, leadership in business and achievement activities like sports and the arts. See also the website here[4] for tools for self-analysis and self-improvement in this respect.

The capacity for a person to do well in creating their own livelihood is very likely to be connected to this flexible belief about intelligences. In Gaia U we use the term "Mindflex" to invoke this idea. Mindflex is closely related to "agency," the word used to describe the empowerment a person assumes in the world. If we have a strong sense of agency, we'll change the world around us to suit us and others better; and, if we have a weak sense of agency, we'll leave it just as it is and/or give up if the changes we want don't arrive easily.

Confidence in mindflex and a strong sense of agency are essential for working on creating a regenerative livelihood. The primary beliefs of this worldview are:

Reality and my mind are both malleable

They can change/transform together

I have the potential to make a difference

Acquiring Beliefs

People acquire their beliefs about their intelligences through all manner of conditioning including the feedback they receive from mentors.

According to Dweck feedback that affirms a person's "smartness" as in: "wow, you're really smart" is not so good as it reinforces the fixed mindset. Feedback that acknowledges effort and application,

[4] http://mindsetonline.com

as in "I can see you have made a great effort to understand this well, and you have been strategic about this" stimulates the growth mindset attitudes and beliefs.

We have had a sense of this continuum for some time in Gaia U: indeed we renamed mindsets to mindflexes to emphasize continuous growth of our multiple intelligences[5] and we talk about skill flexes rather than skill sets for the same reason.

Fixed mindset beliefs are deeply embedded in our culture and can be considered a primary means of social control. For certain classes of people (working class, lower middle class especially), it is the dominant belief for both learners and teachers.

Fixed or rigid mindsets are so common and so normal that they are almost invisible. It takes many eyes and a great deal of intelligence to notice where these insidious patterns of fixed thinking show up. An example would be 'The War on Drugs'…

We can readily see that installing fixed mindset beliefs in a mass of people renders them less likely to challenge authority or design their own, better alternatives.

Beliefs and the Patrix

The last point made, that fixed mindset beliefs are deliberately created to limit the capacity of many people to participate fully in steering their culture, does not appear in Carol Dweck's book. Whilst she does show how teachers and parents unwittingly propagate these beliefs in young people she does not then extend the analysis to propose that parents and teachers are co-opted as agents of the dominant culture in this respect.

However, our Gaia U understanding, informed by our knowledge of the Patrix (the patriarchal matrix), is that the school and the family are primary locations in which young people are actively

[5] http://www.institute4learning.com/resources/articles/multiple-intelligences/

indoctrinated by well-meaning adults to accept that their agency, their ability to be in control and to make changes in society, is limited. We say, emphatically, NO!

Getting to NO! means we need active processes[6] through which we reclaim and liberate our own inherent, flexible, and widely capable intelligences. Recovering from dysfunctional schooling and parenting (and assisting others to do the same) are key world changer tasks.

One importance of this more political analysis is that we might otherwise blame ourselves for having any self-limiting, fixed mindset beliefs running in our psyches and not realize or remember that these were installed, in many subtle forms, as a means of social control.

Blaming ourselves for receiving this social conditioning, usually delivered to us when we were vulnerable young people, misplaces our attention in that, while we do need to work on personal liberation from these patterns, the bigger job is eradicating them from the wider culture so that the infection process stops.

Andrew Learns Trading Skills: A Story

Using Case Studies

This section is written as a case study. Case studies are beloved of Master of Business Administration programs largely due to the efforts and advocacy of Harvard Business School in the USA. They surely do have their value (we get to hear some true-life stories and

[6]Active processes include the Gaia U ArCEA reading and critiquing method (see Scholar Skills in this book), being part of a learning and unlearning community that has liberation of intelligences on the agenda, developing a more informed consciousness around the Patrix and using tools like Re-evaluation Counseling to accurately and effectively seek out Patrix patterns and strip them of their power.

can get some practice thinking about what went well and, if we'd have been in charge, what we would have done differently) AND they have their downsides, too.

One downside is that cases studies are contextual. That means, for example, they are focused on a particular enterprise (or entrepreneur) at a particular time of life for those parties, in a particular period of history affected by the social, political and cultural issues of both the time and place. Gender, age, race, class and other aspects of the identities of our subjects are also aspects of the context that will have affected the story.

Therefore, you, the reader need to be alert to the possibility that the case study might be wildly irrelevant to your current situation and/or that contextual issues that were strong at the time of the case study are no longer an issue today.

Likewise, you will need to parse the stories to test for idiosyncrasies that show up as a result of the identities of any human subjects described, again in order to notice if the case has any lessons for a person with your identities.

Also, most enterprise case studies choose either well-known and large companies (Apple, Amazon, AirBnB, Procter and Gamble…) or the sparkly, new, rapid growth companies that appear in magazines like *Fast Company*.

A common goal amongst these enterprises is to grow as much power and influence in the market as possible along with high returns to the stakeholders. Some of these enterprises are built specifically for resale. Then the original owners can cash-out the hard work they applied bringing a start-up to viability. They convert so-called sweat-equity into money.

This case study is different as it deals with a business that grew from nothing (*boot-strapped*), was ecologically and socially regenerative in design and execution, developed for the long-haul and was not designed to be sold. Our assumption is that this is much more likely

to be in character to the kinds of enterprises Gaia U associates are likely to be involved in.

The Competence Ladder

In this case study I, Andrew Langford (Co-President of Gaia U), outline my own history of acquiring trading skills starting in the late 1960s and continuing to this day as Gaia U is itself a regenerative, ecosocial enterprise.

Trading skills are a category of skills that are hardly recognized in the general population despite being critical to creating enterprises of any sort.

I am telling you this story for a number of reasons. In the first place, it may assist you to avoid some of my mistakes. Secondly, it is full of what might be useful tips; and, thirdly, you can see that I am speaking from experience. This is often not the case when it comes to enterprise education. A surprising number of agencies imagine that any good teacher can teach trading skills. This is entirely mistaken in my view, and you should always inquire of any person giving you enterprise advice as to their own practical experience of making their own living.

To tell my salutary tale (salutary means that something good eventually comes out of something difficult) I need a model. The one below uses different categories and variables than the AQ model we saw earlier, but note that it uses entirely the same structure thereby indicating that this quadrant model is versatile when considering the interaction of two variables.

This version has to do with the following 'stages' of knowing, starting with:

'I don't know that I don't know' (not knowing that knowing anything is critical). This can also be described as a state of unconscious incompetence that, with experience, gives way to: -

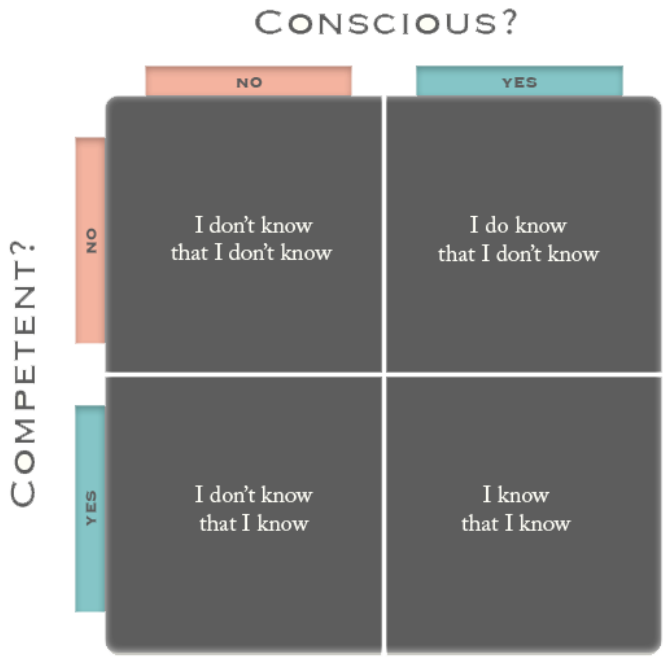
'I do know that I don't know' (becoming aware of not knowing). A state of conscious incompetence that is a significant advance on the state before and that is followed by (assuming we engage with an un/learning effort of some sort): -

'I know that I know' (an active sense of knowing—conscious competence). A state of confident performance that also acknowledges that there is plenty more to learn and that may eventually become: -

'I don't know that I know' (the knowing is now so well internalized as to become a kind of unknowing—a state we could call unconscious knowing.

An example of this last stage shows up when people raised in the digital age (so-called digital natives) struggle to comprehend why earlier generations (so-called digital immigrants) can't just do it and need everything explained (and, even,face-palm, have to write instructions to self on paper…!). For the digital natives, navigating and using digital systems is in their 'background of obviousness,' and they may have no conception of ever having learned it; whereas, for immigrants, the knowledge has to be consciously learned layer by layer.

Note that people in the 'I don't know that I know' do not necessarily make good teachers unless they make special efforts to see the world from a learner's perspective.



Conscious Competence Diagram

Sadly, I was ignorant of this progression when I attempted my first business aged 18, The Mermaid Forge, in the late 1960s. The story continues in the next section.

The Mermaid Forge: Falling off the Ladder

The concept was to provide a convivial co-working space for artists and artisans attached to a coffee-shop where their goods were displayed for sale. The general location was suitable (Totnes, England, a small market town in a rural area that, through proximity to Dartington Hall, was both relatively receptive to new thinking and well populated with artists, musicians, and artisans).

The Mermaid Forge was a good concept, but I had no idea that I hadn't a clue as to how to go about it. I vaguely imagined that my charismatic partner might know how to run a business. (He said he did, but I did not know what questions to ask to make sure and was not even aware that some due diligence might have been required).

We hit cash-flow problems early on (meaning that we spent all the capital I borrowed[7] before we started to generate any income. We upset the local zoning folk because we failed to apply for appropriate permissions, annoyed the neighbors by making a lot of noise at night, and in almost all other ways failed to act with any sense of prudence. Effective mentoring from experienced entrepreneurs was not available and, even if it had been, it is quite possible our arrogance might have meant we would not have benefited from it.

The business crashed and burned, leaving in its wake pissed local creditors, angry artisans, and an embarrassed family. Shortly after the crash, I married Verity Swan, my high school sweetheart, and we left town to seek a restart of some sort.

This disaster (which, of course, I can now reframe as a transformative action un/learning experience!) was, in my case, largely due to not knowing that there was anything to know about being in business. I came from a family of salaried public servants (school teachers) who had no experience of any other way of making a living. They did this with excellence and commitment, but they did not have to trade in any way. Trading was not part of our family culture. Indeed, there was even a hint in the way my family thought that suggested that being in business (especially small business) was a) risky[8] and b) somehow less worthy a way to make a living than having a proper job and career.

Trading skills are critical!

[7] My partner, who later turned out to be 'dodgy,' always had some cash due to come to him anytime now. But, hey, what do you know, it never turned up.

[8] My maternal grandfather was an entrepreneur who went bankrupt in the early 1930s during the Great Depression—even though the family knew that the world situation played a big part in this disaster—there was always an underlying (and unfair) suspicion that it was somehow his fault.

Trading requires a distinct flex of knowledge and skills, invisible to those who have not been schooled this way. Those of us without a trading background must bring this need to a conscious level so we can design un/learning pathways that expose us to these essential trading and enterprise skills. These might take us some years to complete.

Un/learning Trading Skills and Climbing Back on the Ladder

It took me seven years to gather up the confidence to have another go at enterprise and, this time, I'd had five years' experience working in shoe-making factories (in a company run by Quaker's whose motive for factory location was to provide work in small rural towns). I worked as a work-study officer and then moved on for two years of business-related higher education. I joined a one-year post-graduate Diploma in Management Studies, a precursor to the now common MBA degrees, and an MSc in Organizational Design.

By this stage, I had unlearned the subtle disdain my family had for business and had come to understand that ethical enterprise can be a powerful force for creating movement towards social justice (I had not yet caught on to the ecological imperative).

This time I was dangerously close to thinking that maybe I did know that I knew what I was doing. Fortunately, the universe reminded me of my previous arrogance, and I approached this transition[9] into creating an enterprise with a little more humility.

[9]Transition, making big changes in our lives, is a topic of great interest in Gaia U. That's because we understand that we are in a moment of global transition that requires all humans on the planet to adjust out of a world system centered on neoliberal capitalism and into a world system centered on ecosocial regeneration. In this context our individual willingness to transition is critical. My transition, for example, involved ending one way of making a living (being employed) then traveling bumpily through some turbulence in order to find a new path and then engaging with the new when it became clear.

The problem with business schools

What I discovered was that I had been schooled in the concepts and tools used in a scale of business that might have twenty-thousand employees and turnover in the 10's of millions. Many of these concepts and tools were dangerously inappropriate for our chosen path.[10]

This is a general truth about business schools, that they are mostly geared towards providing competent servants to large enterprises and are not much focused on supporting people who want to make an independent living for themselves. A second issue is that, just like any other conventional school, they have no interest in providing sustained mentoring and support.

In our case, we planned to return home to Totnes to bootstrap (meaning to start with almost no capital [11]) a cooperative, small-scale shoe-making venture. It was inspired, in part, by a book by another Schumacher — Fritz, author of *Small is Beautiful.* His seminal book was published in 1973. Our other influence was Ivan Illich, whose significant and congruent book, *Tools for Conviviality,* was also published in the same year. Donald, my father-in-law and an accomplished artisan himself, was also a constant source of encouragement.

[10]By this time Verity and I were parents to 2-year-old Amy, and Joseph was on the way — family considerations were a big factor in determining our choice to return to Totnes. Verity clearly understood that the conventional route in which a well-qualified husband would get a managerial job in a city far from grandparents and other family members was not a supportive scenario for raising a young family. This insight coincided with my own growing passion for regenerating rural areas by deconstructing industrial manufacturing and bringing it home to provide local artisans with livelihoods. These ideas were kindled by, amongst other inspirations, early exposure to the local Dartington Hall experiments.

[11]I am explaining any enterprise/business language just in case you are not familiar with it. Learning the language takes you a long way down the path of awareness regarding what you know and what you don't know. One thing leads to another by which I mean that starting a business without much capital (we had about $700) means that having a product to sell early is very helpful. The income from these early sales provides some cash for the next round of development. Reinvesting retained income (or profit) is one formal name for this commonly used feedback loop. You can see how apt the term bootstrapping is, derived as it is from the apparently impossible idea of lifting yourself off the ground by pulling on your own bootstraps.

The Importance of Community

This page might be labeled for the upper right quadrant (Pro Skills) although maybe it deals more with lower left quadrant factors to do with Community and Relationships.

Returning home to Totnes to work up our small business also meant that our families and community could help us in oh so many ways! Without this array of soft assistance, we'd have had many more struggles. Some of these forms of help are listed below:

— My parents gave us a private mortgage for half the value of a small house and allowed us to pay that back, without interest at a pace that suited our finances. That was big (and we did pay it back but after 5 years)!

—Verity's mother allowed us to use the basement workshop in her house to make the first mini-factory, on a work exchange basis (no cash rent required).

—Later on, once we had acquired a high-street premises and therefore had 'opening hours,' grand-parenting (picking up Amy and Joseph from school and taking care of them until we'd finished work) was super-helpful even though we enjoyed that special, valuable quality of being self-employed that meant we generally got to choose (and vary day by day as the need arises) our hours of work. This brought substantial flexibility into our lives so that we could integrate parenting, housekeeping, gardening, and other life-sustaining projects into our lives in a way that conventional wage earners would find difficult.[12]

—When we reached the place of having a minimum viable product (we'll discuss this later) my elder brother lent us some money to

[12] A big tension for me when employed by a large company was noticing how hard it was for mothers to manage the inevitable contingencies that arise from parenting whilst holding down a full-time job on the bench. An emergency or even a scheduled medical appointment would necessitate activating a complicated support network that may or may not have the slack to help at the time. The factory management could be impatient with mothers in these situations and also colluded with sexism by making it abundantly clear that fathers were not to even consider for a moment that they should be involved in helping with these issues.

boost our 'working capital'[13] so we could afford to ramp up our productive capacity.

—We knew a wide network of people many of whom had skills we needed from time to time to help us on our way (accountants, architects, builders, people with premises in the High Street for rent).

—The local bank manager (this is in the old days when bank managers were part of the local community) knew our family and was therefore predisposed to listen to our requests for overdrafts once we had a couple of years of trading behind us

—We were living in a country in which universal health care is the norm (that's big too)

Both our families are lower middle-class with working-class roots. Their generosity, noted above, was more to do with generosity of spirit than to do with being wealthy. Not all families have this grace and, in these cases, we would do well to build healthy support webs amongst other friends and colleagues instead.

Whilst to some extent these inflexibilities were because of the production line system of working — one person missing from a critical position on the line without adequate notice could bring the entire line to a halt — there was also a stern and rigid set of patriarchal rules that applied even when circumstances would have permitted more flexibility. Our own workshop scale venture paid a good deal of attention to making the conditions of work, family/single-parent friendly.

It is quite possible for an enterprise to have a successful early product (one that customers are prepared to buy) but then get stuck for the working capital needed to get the product into viable production. In our example, we hand stitched everything to start

[13] *Working capital* is the money an enterprise needs to invest in all manner of stock (raw materials, work-in-progress, finished goods), tools and equipment, improvements and adaptations to premises, training for staff and more. Each stage of growth involves increasing working capital. Sourcing that increases in working capital is a constant thread of concern for the owners.

with in order to 'prove' our market was there then borrowed from my brother to raise to the next level (the working capital needed for hand stitching is very little, so we could get started without borrowing).

However once we knew we had a good product (improved through suggestions gleaned from early adopters) it became essential that we tooled up with various machines in order that we could make shoes fast enough (and well enough) to sell them at a price that our customers would pay and at which we could make a living. We also needed to invest in bigger raw material stocks.

All in all, we needed to quintuple the money invested in the business, that is, the working capital. My brother's 'soft' loan' was very helpful at this stage (soft in this context means 'pay it back when you can' and 'make me some shoes instead of paying interest' — loans like this are a delight).

Buen Vivir

We also practiced 'buen vivir'[14] or 'voluntary simplicity.' Verity developed major skills at running a low cost yet convivial household economy (and, once Joseph was in pre-school, came and transformed the shoemaking workshop into a hive of productivity). We walked and cycled a lot and ran an ex-post office utility van as the family car. We replaced the hot-air central heating system in our house when it broke down with a wood-stove so we could scavenge firewood to keep costs down. We rented a ¾

[14]Buen Vivir is a term used in Latin America by people and agencies focused on creating economies in which the commonwealth is used to support accessible community services (schools, clinics, support for the elderly and so on) so that people with low incomes do not live disadvantaged lives but, instead, live well. Our experience confirms that buen vivir is possible even in the UK culture that has been privatizing the commonwealth since the 1700s (starting with the systematic enclosures of the common lands). This question, about how to retrieve the commonwealth and then use the income it generates for the good of all is critical to turning around the degrading culture we currently live in.

acre small holding[15] where we ran pigs fed on scraps collected from Tom Crisp's (that really was his name!) greengrocery store in town (our motto became 'often short of cash, never short of pork). We high-graded organic, whole food restaurant rejects to feed the family before sending the rest to the chickens. We grew our own vegetables, did camping holidays, brewed our own wine and beer and made our own entertainment. We also canceled as many monthly payment options as possible and did all our own household and workshop repairs.

See here[16] for an updated Western buen vivir lifestyle inspired by permaculture.

Living this kind of lifestyle requires learning a wide range of skills and often takes a lot of patience. As a good friend of mine notes, it is often the case that the less money you have, the harder you have to work for the same benefits that wealthier people take for granted.

For example, when on a low income in the UK and without a bank account you might be required to pre-pay your utilities using a 'key' in a meter that you top-up at a post-office or other facility using cash. That means you have to save the money, travel to the facility to charge your 'key' and get back home to keep the power on. You might have to do that three or four times a month if you are living hand to mouth. That's much more work than paying a monthly or quarterly bill by direct debit from your bank.

Anyway, it was a lot of fun. We made a range of great products (our Conker Shoe strapline was 'comfortable, colorful, robust and

[15] Access to land — we rediscovered what peasants and capitalists (from different motivations) have known for a long time. When peasants have access to land (including the commons), they have high levels of resilience and relatively little need for cash. Therefore, they can more readily shape their commitment to wage labor to suit themselves and, in many cases, they can take it or leave it. That's one of the two powerful reasons why the owning classes have, since the 1700s, sought to steal the land from peasants. Doing so renders them indigent and therefore desperate for wages.

[16] http://our-permaculture-life.blogspot.com.au/2016/04/live-simply-save-money-avoid-debt.html

repairable') and it was a very empowering lifestyle, although it was only too easy to get silly busy.

Under these circumstances, people can be coerced to labor under inhuman conditions. Another reason is that the rents from land, once a community resource, become the private resources of the landowners (rentiers) who grow ever richer whilst the peasants grow ever poorer. This is the basis for the inequality that exists in our cultures today.

Trading Skills: The Details

Just What are Trading Skills?

Let's look at some models generated by people with trading skills.[17]

Imagine our shoemaking workshop, housed in a small barn-like stone building, built into the medieval town wall in an area of Totnes called 'The Narrows.' One day, around 1982, we were visited by Michael Phillips and Salli Rasberry, both from San Francisco, USA. They were both activists in the Briarpatch Network, a network of mutually supporting small enterprises operating in the Bay Area. They were/are passionate advocates of Honest Business (they later wrote a book[18] by that title) and were on a trip sponsored by Dartington Hall to see if their ideas of both honest business[19] and small enterprise networking could be adopted in Totnes and its district.

[17]These are from people in the conscious competency zone. This meant they were able to articulate what these skills were and also remembered learning these themselves. People who have gone past this level and are unconsciously competent often struggle to imagine that they have anything to teach, and it can be frustrating to get good information from them.

[18]https://www.alibris.com/Honest-Business-Michael-Phillips/book/8382749

[19]Honest business meant keeping 'open books.' This is when a business makes its trading accounts (profit and loss account and balance sheet) available to clients to read. Keeping open books is a challenging level of transparency for a small enterprise.

I remember Michael wore a completely white suit and that I feared for its safety in our rustic workshop full of leather dyes, beeswax, and other staining dangers but, that tension apart, the meeting was fascinating. They had identified 4 abilities of successful micro-entrepreneurs. These were drawn from observation during from their extensive work consulting with and supporting small business owners in the Bay Area. With us, the inquiry was to see if this list of abilities were relevant in our small market town with rural English culture. Their descriptions resonated with us, and we were delighted to see an analysis that focussed on 'ways of being in the world' rather than solely on the technical aspects of being in business.[20]

The four abilities of successful micro-entrepreneurs:[21]

Casinoistic
Sensate
Empirical
Being a zestful 'Books' worm

Casinoistic, Sensate and Empirical

Ability 1 – Casinoistic

For this ability, they had to invent a name and yet it is central. It is an ability to cheerfully assess risk. We might ask questions like, "what are the chances that I will make/lose money if I choose this strategy"? We do this in situations in which the odds either cannot

[20]We propose that, in our Gaia-centric context, it is best to think of an enterprise as consisting of a mix of ecological, sociological and technical systems. Therefore we need to know about more than just the technical aspects of trading skills.

[21]Different entrepreneurs have different levels of access to working capital, that essential cash and credit needed to finance a start-up. This is often determined by social class and inheritance. Working class and lower-middle-class people are more likely to need to work harder and leaner in order to accumulate these resources in the first place. A micro-enterprise (less than four people working in it), especially one that maximizes the leverage of other forms of wealth besides financial capital is the most appropriate scale of enterprise to initiate when working capital is hard to get.

be known with high levels of certainty or when the attempts to 'know for sure' would be so time-consuming as to waste part of a person's life that could otherwise be spent in more joyful pursuits.

There is both figuring (see Being a zestful 'Books' worm below) and intuition involved and a person might well ask, "Can I afford and am I willing to lose my investment altogether" Note that people with Casinoistic abilities are always prepared to lose or 'write-off' investments that don't work. Without some willingness to lose from time to time a person would be 'risk-averse,' and people with risk-aversion distresses are not happy in an entrepreneurial context (until they unlearn this aversion).

And note that casinoistic does not mean reckless. Reckless (foolhardy, impulsive) means taking risks without any efforts to make predictive calculations, or worse, actively seeking thrills and attention by placing yourself in danger. Both risk-averse and reckless are, in Gaia U terms, distresses that include patterns of rigid thinking. There is a healthy, free of distress middle-ground in which a person handles risk with both foresight and courage.

Ability 2 – Sensate

Sensate describes an ability to move from theory to practice at an early stage — to value hands-on activity as a means of testing out ideas rather than over-thinking the possibilities. 'Rapid prototyping' is one contemporary term that speaks to this ability and a person with well developed sensate abilities prefers to find ways to mock up ideas with any artifacts that come to hand to test out assumptions.

Likewise, a person with these abilities would much prefer to produce an early version of their product and get it out there, maybe for free, to early adopters to see and feel in order that these most valuable allies can give user feedback. Our sensate actor really appreciates this feedback as it helps them tune their product/service to the market.

Being sensate contradicts the common tendency to perfectionism many of us suffer from and notes that perfection is the enemy of the good. At the opposite end (and equally distressed) is a tendency to being slapdash, doing things badly and in a hurry.

Contained in the worldview that allows sensate abilities to flourish is the understanding that a person does not need to know, and probably cannot know, how to do something until they are fully engaged with doing it.

Ability 3 – Empirical

Being empirical, means being willing to notice the evidence that shows up regarding the effects of our actions. That is, when we make an intervention in the world (which we do all the time) and are being empirical, we notice what happens. If this result checks out well against our desired goals, then we can do more of what we were doing. If the outcomes are not what we want, we can change direction (pivot). The key is, we notice what's happening and adjust course as necessary.

Many of us have heard the expressions "when you stuck at the bottom of a hole it helps to stop digging" This is a jokey way to point out the problem we might have with being empirical. Sometimes it feels easier to buckle down to doing what we are already doing with more energy and resolve, even if the signs are that we might well be pushing in the wrong direction.

At the other end of the distress scale is a compulsive readiness to give up at the first sign of discouragement. Many of us have a long history of being discouraged and disappointed, a history that can interfere with us showing persistence in the face of even a minor setback.

Becoming a Zestful 'Books' Worm

Ability 4 – Becoming a zestful 'Books' worm

This is the most technical aspect of trading skills and one that may seem alien to many. It involves math (simple), and some of us might find that off-putting. However it is crucial that we understand how the 'Books' (also known as The Books of Account or, simply, The Accounts) of a business work and what they can tell us, and it is even better if we cultivate a sense of thrill and delight (zest is best!) whenever we look at our own 'Books' or the 'Books' of another business.

There are three core reports (or scorecards) to understand.

The Balance Sheet – this shows a snapshot in time of how much capital is 'tied up' in the business including what it owes to who (liabilities) and what it owns (assets). It is helpful to compare a series of Balance Sheets (often one for each trading year) to see how the level of assets and liabilities change over time.

The Income and Expenditure Account (also known as the Profit and Loss Account) – if income is more than expenditure for the last three months or for the last year then our business has made a profit. This will make the value of our Balance Sheet grow. If it's the other way around and expenditure is bigger than income then we have made a loss and this will make the value of our Balance Sheet shrink (we can probably absorb some short-term losses by shrinking the Balance Sheet but, at some stage, it will shrink to nothing in which case we'll need to stop trading.

The Cash Flow Forecast - tells us when money can be expected to come into the business (and how much), when money needs to be paid out (and how much). By charting the flows in and the flows out (often month by month) and setting these against the balances, we start with we can see if and when we'll run out of money.

It is common for small businesses to run into cash-flow issues

even if they are profitable. For example, we may issue requests for payment (invoices) to our clients who might take longer to pay these than we expect. But, in this case, our expenses (wages to any staff, payments for goods we have purchased) can't be delayed,[22] so we have to pay these out before the money to cover them has come in. Here we'd have a cash flow deficit and, if we don't have a big enough buffer of cash in the bank to deal with this trough, we'd have to make arrangements to borrow the money from outside, even if it is just for a short time.

There are many useful resources available on the web that we can use to become 'Books' literate. Here is a site[23] that lists 50 free accounting courses and classes for small businesses that you can choose from. Of all the resources listed there these two are promising:

Open University of the UK[24] – starts with a review of the necessary math.

SmallBizU[25] – Accounting Fundamentals – arranged as slides with a soundtrack explains the terms and concepts step by step.

The Lean Canvas as a Diagnostic Tool

We are blessed to be in the era of 'Lean.' Lean is an approach to outlining projects and enterprises that have been developing for a couple of decades (it originated with Toyota Manufacturing) and is rooted in flexibility, innovation, minimalism and just-in-timeness (just to name a few of the key concepts).

[22] Sometimes it is necessary to ask people we owe money to, to delay their demands, so our cash flow can catch up. Our creditors (people we owe money too) often prefer to receive their payments late rather than not receive them at all!

[23] http://blog.directcapital.com/business-insights/50-free-accounting-courses-and-classes-for-small-business-owners/

[24] http://www.open.edu/openlearn/money-management/introduction-bookkeeping-and-accounting/content-section-0

[25] https://www.ncsbc.net/workshop.aspx?ekey=560370137

Lean supersedes a previous era of heavyweight business planning. Business plans were often 40-page documents that took a great deal of effort to produce and that almost no-one subsequently read. See here[26] for a critique of business plans.

Instead, the Lean approach invites us to create a rapid prototype of our enterprise using a Canvas (a graphic template on one page). This provides us with a poster we can then use to present our thinking to all manner of potential allies in order that we can a) get their feedback and b) incorporate any of this fresh thinking, given it makes good sense, into the next iteration of the canvas.

Ash Maurya (author of Lean Canvas) claims that producing a complete Canvas might take as little as 20 minutes. That may be true for a seasoned Lean Canvas user but for most of us the process takes longer and, indeed, if our trading skills are not yet fully developed, we might not be able to work confidently on all the sections.

So, in this Element, we are using the Lean Canvas[27] as a diagnostic tool in two ways.

First, we can see what sections we can readily complete and which ones are beyond our current skill flex. This diagnosis tells us what we need to learn in the near future if we wish to continue down the enterprise track. Secondly, we'll get to see how complete we are with our enterprise design. Sections that we can't yet fill (even though we'd know how to do that) show us where we need to focus our development work.

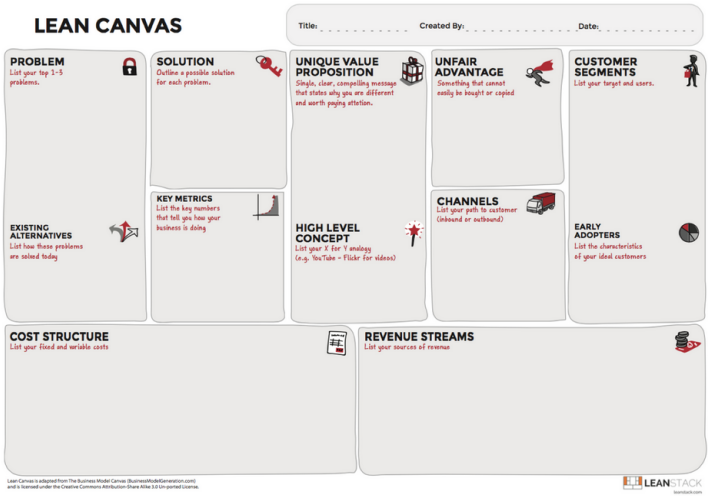
Here is a compressed version of the Lean Canvas (you can download a full-sized copy as a pdf here[28]). Sign-up to the Lean Canvas site here[29] for a free account and study the model further.

[26] https://www.linkedin.com/pulse/its-time-fire-business-plan-good-ash-maurya?inf_contact_key%3Df78ff1f63c19514845a26e6ec65ebb0a29a3c7a0f381a4cf2fd6c7ab52f2684b

[27] At Gaia U we have an observation to make regards the Lean Canvas. Instead of unfair advantage (that means no-one can copy our business, at least in the beginning), we might deliberately design for replication so that many others can benefit from our pathfinding.

[28] https://leanstack.com/leancanvas/

[29] https://leanstack.com/leancanvas



Lean Canvas Example; CC 3.0

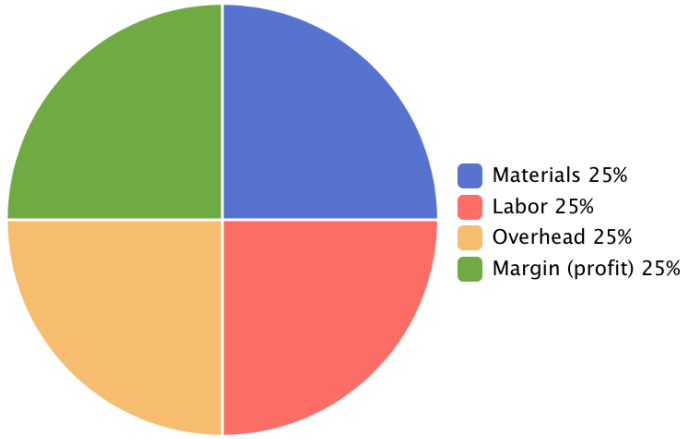
Costings or, How Much to Charge?

The 'Books' enable a key function. That is, they hold information captured during trading (historical data) that we can use to test out whether decisions we made about the selling prices for our products (goods or services) were sound. Did we make a profit or not being one critical question? Do we need to adjust prices being another?

But there is a problem. What if we are a startup with no history? What if we are working in the field in which we are novices and for which we have no knowledge about how all the costs[30] of the business stack up? In these situations estimating becomes an essential skill. Estimating is greatly assisted if we have some rules of thumb to go by.

[30]Costs come in categories. For example, in my shoe-making business, the categories are: i) Materials, ii) Labor, iii) Overheads (a category that can include rent for the workshop, heating and lighting, administration efforts, marketing and more).

For example, in making and manufacturing the following guidelines are acceptable:

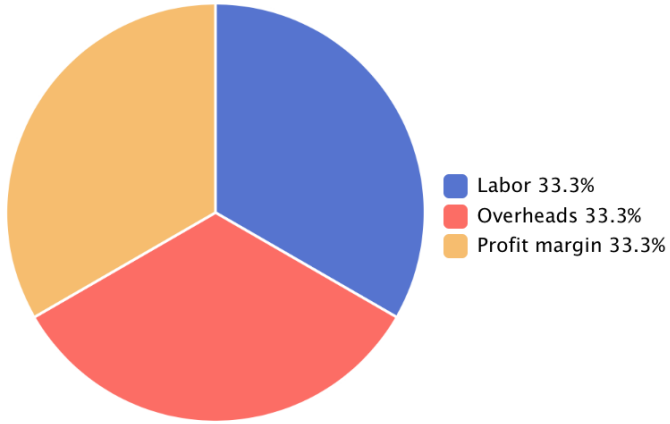


Note these are guidelines only and if you are first out of the gate with a new product your margin[31] can be substantially bigger than this. Likewise, if you are working in gold, your materials portion might be greater. However, having these guidelines is spectacularly useful. Now it becomes possible to estimate an approximate selling price knowing only one figure.[32] For example, use the cost of materials, a cost that can be discovered well in advance of operations by measurement and desk research.

For services, such as design consultancy, the rule of thumb looks like this:

[31]Capitalism has a typical product life-cycle. For new, innovative products where there is not yet any competition, the margin can be big. This is why companies 'innovate.' They are seeking to be in the lead in a market, at least for a while, so that they can charge high prices and make big margins (patents and other restrictive practices are designed to maximize this period of time).

[32]Ever seen that T-shirt that says "another week gone past and I still haven't used algebra?" Well, here it is in real life – if we know materials = $30 we can then estimate the unknowns as follows: L = labor also = $30, Oh = overheads = $30 and P = profit = $30. Rough but useful!



That's typical (but variable according to a whole range of factors). This is enough information to get going.

For retail (buying in a product at wholesale prices and then selling it on again to the public at retail prices) a typical scenario looks like this:

Selling price = purchase price times 2 (low margin products with a high volume of sales), 3 or even 4 (slow-moving items or "exclusive" items).

In education the rule of thumb is:

Calculate the cost for teaching (direct hours and prep/marking hours) and double this figure. All overheads and margins come out of the half not paid to teachers. This does not apply when there are substantial extra costs involved such as travel to venues, residential accommodation, and catering services for staff and students.

Rare as hen's teeth (hen's don't have teeth!)

This information is not easily come by. Companies are generally reluctant to share details of their cost structures as they consider this information to make them more vulnerable to competition.

Be alert for experienced trading people who are prepared to share cost structures (and be deeply grateful for this valuable insider information). Once you have the experience and the history, be prepared to share your version of this information yourself. Come back here and add your knowledge to the commons.

A more sophisticated business might break marketing and advertising out into a category called 'Cost of Sales' (materials might be in there too).

Look for Profit and Loss accounts[33] online and become familiar with the various terms and the possibilities. Note that too much detail is possible and that the more detail there is, the less possible it is to use the data for everyday purposes.

Meanwhile, the competitors notice how well the original company is doing and seek to copy (or innovate beyond) the product in which case competition reduces the margin and, as additional capacity comes on stream, it is quite likely that the market becomes saturated and the margin drops away to nothing. Then 'restructuring' in the industry occurs (some enterprises go out of business and/or they are bought out by competitors). More about this cycle later.

Activities

Mini Life and Career Review and Mini Learning and Intentions Pathway Design

Use the concepts in the Inner Qualities section (beliefs and mind flex) and the Pro skills section (trading skills) as tools for shaping two small pieces.

The first, a mini Life and Career Review (a look backward to your life so far), is a response to the question: **In what aspects of**

[33] http://www.samplewords.com/profit-and-loss-statement-template/

mindflexing and trading skills do I feel confident (what's my experience of these) and in what aspects do I feel challenged.

The second, a mini Learning and Intentions Pathway Design (a look forward in your life to come), is a response to the inquiry: **What aspects of mindflexing and trading skills do I need to learn and, how might I go about learning these (how, when, where, with whom…)?**

Mini means about 10 lines on each, but more are welcome.

The pattern of generating a Life and Career Review (LCR) followed by a Learning Intentions and Pathway Design (LIPD) is a core pattern in use in Gaia U. Every learning cycle pays early attention to these essential 'bookends' as doing so develops an increasing sense of purpose. A person on purpose is a powerful being!

Learning from Andrew

The writing in 'Andrew learns trading skills' is narrative. There is no attempt to highlight or summarize the lessons learned during this period. **Your task is to note two or three of these lessons that are relevant to you and to say why these stand out**. If there are none, then please tell us about any other impressions these stories made on you.

About five lines per lesson would be enough, but do write more if you would like to.

Lean Canvas

Use the Lean Canvas from Lean Stack to **outline a project**, just so far as you are able. Notice where the process flows easily and where it seems a struggle (refer back to Activity 1 to make sure you have a remedy for this struggle listed in your mini LIPD). This process requires that you open a free account with Lean Stack.

Instructions:

Go to LeanStack.com[34]
Click on 'Create Your First Canvas' button
Sign up for a free account
Click 'Create New Product' button
Click 'Create New Canvas' button
Fill out canvas as far as you can
Click 'Export to PDF' button to the right of the canvas
Attach this PDF to the Comment in the Activities section

Reflection

Write five lines or more reflecting on your experiences with this course so far. Five lines are enough, but more is welcome.

[34] http://www.leanstack.com

Chapter 2 Creating Regenerative Livelihoods 2

Community and Relationships

Community and a New Mutualism

Many of us know the idea that 'it takes a village to raise a child' and now we can also see that 'it takes a community to develop a livelihood,' especially if bootstrapping is involved. Bootstrapping involves creating a business with only minimal amounts of money (called 'working capital), creating early sales, then using the money from these early sales to provide the funds to keep going. Bootstrapping nearly always calls on multiple forms of capital. Family and community[35] are often the go-to sources of these capitals.

However, these are not necessarily reliable sources. Many of our 'original' networks have been broken apart by historic disruptions like land enclosures, the associated need to 'emigrate' for work; some of us are from families and communities that are so short of hope and resource themselves that they are unable to help. Other families and communities do not have the generosity of spirit required, and others are abusive in some way, and we are better off distancing ourselves from these.

[35]I will use family and community interchangeably here. This is to promote the idea that we can develop relationships of considerable mutuality beyond the boundaries of the biological family if we choose to. This is in contradiction to the more common idea that 'blood is thicker than water' meaning that ties of mutuality are more likely to exist in family, rather than in community.

Therefore consciously constructing 'families' and communities (social networks) that are local to us in our current lives, can muster enough resource, are generous in spirit and who do not seek to have power over us is a viable option.

These constructed communities can have all manner of forms and have, at other times in history, been extensive and well developed. 'Mutuals' are an example, like the many Building Societies[36] of Great Britain created in the late 1800s. These enabled people to pool their resources through monthly contributions from their wages in order to support house construction. They survived until undercut by the aggressive privatization of the Thatcher government in the 1980s.

Nowadays mutuality is regaining zest and energy[37]. Reconstructing this form of collective ownership of the assets of society has much to commend it[38]. This task requires a tremendous effort to bring mutuality back into the conversation. The Gaia U approach is to invite people to experience the benefits first hand to truly appreciate the community empowerment that arises from this 'back to the future' form of organizing money for the benefit of working people.

Therefore in the following pages you will find two modest designs for small, easy to do, DIY (DIY = Do it Yourself) mutuals that a) provide income support for times of transition and b) access to capital for funding bootstrap livelihoods. Your mission, over the next few months, is to imagine and then act to have these in place.

[36]These venerable institutions did, unfortunately (see Adizes Lifecycle), become aristocracies (strong by virtue of market presence and consolidated accumulated successes, but slow and unexciting) with high levels of bureaucracy (inward-focused administration, cumbersome) and were maybe close to death (closure, sell-off, bankruptcy, bought for asset value or customer-base only). Consequently, they alienated many of their millions of small-scale shareholders who were then unwilling to help fend off the attacks from the corporate sector who were aided and abetted by the Thatcher Government, who in turn, made the necessary modifications to the laws.

[37]http://www.theselc.org/maycampaign1

[38]To get going on modern mutualism see Kevin Amos Carson here on Wikipedia. There is a substantial discussion arising from the economic theory embedded in Carson's views, and it is past time that the worldwide permaculture community had these discussions so that we can scale up our efforts to transcend (but include) the back-garden/yard.

This is an invitation to function with a classic permaculture self-help approach although, instead of inviting you to increase food security by growing your own food on the windowsill or in your yard (do that anyway), it invites you to also grow your financial resilience close to your back door.

By convening a successful micro-mutual today, you are:

- acting for your own benefit now,

- preparing yourself and colleagues[39] for larger scale mutual action in the future and

- laying-in memes of mutuality to the world system psyche ready for a dynamic form of mutualism to become the world standard.

What's not to like?

Community Action Prepares for World System Change

Many of the large-scale changes required of the world system (ensuring that semi-peripheral and peripheral regions, {towns, villages, hamlets} thrive and have co-determination with the Core) need the Core Zones to change their (our?[40]) thinking and thus their (our?) politics. For example, a countrywide application of a guaranteed basic income could only come about if a decisive and complete political overhaul has been achieved.

[39]Much of this preparation is psychological: it involves un/learning the separation (from self, others, and nature) memes that are heavily promoted by mainstream cultures. This is a key long-term liberation task.

[40]Most of us coming to this Gaia U course are 'first worlders' or, to use World Systems Thinking terms, from the Core. It is just fabulous that we are here as it shows we are seeking something that the Core does not yet provide. However it is worth remembering that much of the way we think about the world is shaped by our experience of being raised in the Core and that, despite our best intentions, we might still be unwittingly holding onto and acting on Patrix inspired Core thinking that assumes our superiority (those of us from semi-peripheral and peripheral parts of the system might also be unwilling holders of 'peripheral' thinking that assumes our inferiority). Rooting out these hidden 'distresses' is part of the Gaia U agenda and you can follow that up by emailing nopatrix@gaiauniversity.org.

Whilst we might do as much as we can towards facilitating such an overhaul most of us understand that we don't have the time (climate change is rapidly impacting society) to wait for such thoroughgoing political regenerations[41] Therefore we undertake to enact solutions at more local levels, levels in which we have more power. These solutions often show up as prototypes that run in our communities and relationships.

On the pages that follow we outline some of these. Income Solidarity and Capital Sharing are two that are of direct relevance to the task of creating regenerative livelihoods. These may be small schemes and may be incomplete, and yet their existence shows that such arrangements are possible, and as they become more widespread, they inform the range of possibilities under consideration at larger scales.

We have direct experience of this upwelling effect. During the 1980s, whenever the G7 nations[42] met, The Other Economic Summit (TOES)[43], focused on stimulating ecosocially regenerative economies, was also convened. At the very first TOES Guy Dauncey, who later wrote the book *After the Crash[44], met Michael Linton, inventor of the LETSystem[45] approach to Community Currencies (CC's – also known as Complementary Currencies). Both Guy and Michael stopped by the Conker Shoe Company workshop (see Andrew's stories in previous CRL course) in Totnes, England, after the TOES event to promote the idea of a LETSystem in Totnes. We agreed and opened such a system that ran for about three years. At this

[41]Political regenerations may well be surprisingly close – following the Latin American lead of the past 10 years the UK, the USA and several other European nations are exhibiting a deep, popular desire for fundamental changes. Doing our best to ensure these actually result in governments capable of supporting ecosocial regeneration is a worthwhile strategy (but please note how fiercely the Patrix inspired extractive opposition will fight to reassert itself – current examples are the push-backs in Brazil and Venezuela).

[42]G7 nations included Canada, France, Germany, Italy, Japan, the United Kingdom, and the United States. The European Union is also represented within the G7. These countries are the seven major 'advanced' economies as reported by the International Monetary Fund.

[43]https://en.wikipedia.org/wiki/The_Other_Economic_Summit

[44]http://www.earthfuture.com/afterthecrash/

[45]https://en.wikipedia.org/wiki/Local_exchange_trading_system

time the very notion of Community Currencies (CC's) was almost unknown.

During the three years, our CC efforts in Totnes spawned the first open source, standalone CC software (in the days of floppy disks that really did flop) and LETSLink UK opened as a support agency for people seeking to start CC's. Later the well respected New Economics Foundation[46] took up the torch for CCs in the UK.

Much later Bitcoin and other systems using blockchain technologies arose as direct descendants of these early prototype (paper and pencil) CC systems and CC's are now considered as an option even by governments (Banco Palmas currency in Brazil). See the Complementary Currencies Resource Center[47] for more information.

What this story shows is that community-level initiatives do indeed have the capacity to inform and influence world system developments. An active understanding of how to use these trickle-up phenomena to good effect would be a powerful strategic tool for us all to develop. This would enable us to develop conscious ecosocial prototypes, with the oversight of sympathetic and supportive institutions from the start.

Income Solidarity

Andrew joined an income solidarity group operating from England and Wales in 2004. Each month members declare their income which is then compared to the common standard. Our spreadsheet calculates the difference.

This difference is multiplied by the percentage each person is 'in at.' Andrew is currently in at 10%. This means any surplus or shortfall (common standard ± actual earnings) is multiplied by the % he is in at (10%) and the result of the calculation determines how much Andrew either draws out from the pool (if he earns less than the

[46] http://neweconomics.org
[47] http://complementarycurrency.org/cc-research-group-shared-timeline-project/

common standard) or pays in (if he earns more than the common standard).

The 'Books'

Most of the names have been changed for privacy although Andrew and Woody (the architect of the scheme) are identified because that way they are available for answering questions. Note numbers are in pounds sterling, the currency of Britain.

A	B	C	D	E	F	G	H
Income Solidarity - Monthly Equalisation Sheet							
Who	% IN	Declared income	Current bar	Difference (C-D)	Diff * % in (E*B)	Loans out	Remarks
Andrew	10%	£800	£600	£200	£20		
Liz	10%	£420	£600	-£180	-£18	£202	Making payments
Colin	5%	£400	£600	-£200	-£10	£180	Making payments
George	5%	£250	£600	-£350	-£18		
Helen	5%	£600	£600	£0	£0		
Harry	10%	£625	£600	£25	£3		
Lois	10%	£400	£600	-£200	-£20	£120	Pre-arranged new loan
Michael	15%	£600	£600	£0	£0		
Molly	10%	£530	£600	-£70	-£7		
Paul	10%	£600	£600	£0	£0		
Vinnie	10%	£1,320	£600	£720	£72		
Woody	50%	£700	£600	£100	£50		
plus interest							
less expenses							
Monthly totals							
Previous reserves (bfwd)					£8,644		
Contribution this month					£72	On loan	Available
Total in reserve					£8,716	£502	£8,214

Income Solidarity Worksheet

A fully functioning version of this spreadsheet is available here.[48] Copy it to your own Google Drive account, play with it and get ready to set up your own income solidarity group.

[48] https://docs.google.com/spreadsheets/d/1-WjKRRVTb_68UqXKkihqGDly8dFW6NsWn3bCxi_6I4I/edit?usp%3Dsharing#gid=0

Towards a simple and effective basic income scheme

The system is very simple. It is also very effective in providing modest support to people whose income sources are liable either to dry up from time to time (becoming unemployed being a typical case), to support people in transition and to provide deep contradictions to the more normal 'every one for themselves' moral that seems to run in many a mainstream society. Likewise, the scheme allows each member to develop a strong sense of trust and confidence in the other members.

Incremental commitment

Note the genius of being 'in at' a percentage you negotiate yourself. This means people inclined NOT to trust or have confidence at first can 'dip their toes into the water' at a minimalist level (0% in or 2% in for example), then watch what happens for a couple of years and, once comfortable with the way it works, increase their commitment as they observe that nothing nasty happens.

This is critical as most of us raised in a culture that extols individual responsibility as a virtue, and are likely to recoil at the idea of sharing income (unless with close family members and even then the power relations that arise might spoil the relationships).

Having a scheme that invites people to push past their resistance to mutual support is one of the greatest values of a mini-scheme like this. It prepares us to be willing to consider wider policy type schemes such as the Guaranteed Basic Income.

Any person can renegotiate their percentage in with the group, anytime.

Safe longevity and a rolling loan fund

Over time (this system has been working for 15 years) we have built up a small reserve of cash (approximately $12,000 USD) and members can apply to take short-term, interest-free loans from this fund. No-one has ever defaulted on such a loan (not paid it back).

Origins

The scheme was originated to support the continued existence of a new bookshop selling counterculture literature. The bookshop could not pay enough in wages to keep it going (the income was less than the expenditure meaning that the business was making a regular loss) although it was hoped that it could develop enough turnover (sell enough books) to change that into a small profit instead. The members undertook to 'top up' the wages of the staff for the time being by contributing what they could afford according to the formula above.

The bookshop did thrive for a while, but then lost traction when the digital age came about and so it was closed. However, the income solidarity scheme proved a success, and so it lives on.

Surprises

Contrary to what we might imagine, it does not require that people are close friends in order for the scheme to work. Most of us don't know each other very well although there are some good friends with longstanding relationships involved. Woody, however, does know everybody and his integrity in recruiting people and administering the system is an important element of the sense of safety although, as Woody keeps reminding us, a member can use their percentage-in commitment to manage their own comfort levels.

Next steps

Minor complications exist when self-employed people mix with wage earners or pensioners. A self-employed person would report their monthly drawings although, if these are too large to allow their enterprise to make a profit then they are encouraged to report the profit (or loss).

The scheme is small (but not insignificant). It has easily risen to the challenge of being more supportive of members who want to take up specific projects. That would be easier still if the scheme

had twice the members. We can imagine that a scheme with a goal to open new regenerative enterprise might work on rotation to some extent. One or two persons get to have two years of support while the rest of us jog along keeping the cash rolling in with an expectation that another two people take their turn for the following two years.

The scheme assumes that a single bar, or base rate, is adequate. With the cost of housing varying so much between rural and urban areas these days (this being the largest portion of the bar), it may well be that a variable bar according to the relative expense of dwelling location is required.

Capital Sharing

If income solidarity seems scary, what about pooling assets (including savings) and then sharing the use of these resources amongst members of the pool? More scary still, and yet Icefall, the capital sharing project described here has both enabled good projects and 'saved the day' for others.

A short list of these yields is as follows:

Twice in the last five years Icefall has stepped forward with interest-free loans of $20k issued to Gaia U to cover cash flow shortages. We'd have gone under without these loans due to no fault of our own, but due to the fall-out from the 2008/9 crash that still lingers on. A feature of these loans is the speed with which they can be set up (a matter of days) and the lightness of the justifications required (one explanatory phone call). We make a schedule of repayments and stick to it.

Since 2005 one member, Hertha (a young adult), drew down from the fund to strategically supplement her student loans whilst taking both a Bachelor's degree and Master's degree at a UK University (fees are low compared to the USA). This enabled her to keep her

student loans to a manageable size, and she has since paid these off in full.

A pre-approved bridging loan from a bank required to cover the purchase of one property while selling another fell through last minute and threatened to abort the project. Icefall stepped in to provide some of the bridging finance and enable the deal to go through. Both properties were owned by Housing Cooperatives, and the scheme was designed to transfer long-term capital resources from a group of Cooperating Elders to a group of Cooperating Young Adults.

During the property sales, Icefall acquired a two-story brick-built workshop and office space and rented this to our administrator, Woody, to enable him to continue working as a jobbing plumber, electrician and community organizer. The purchase is both an asset for Icefall and a secure place of trading for an ecosocially active member.

An associated carpooling group (Rusty Car Share) has taken a loan from the pool to purchase their first electric vehicle.

These are all modest outcomes. Yet, they are quite remarkable for a fund that stands at a mere $75k. And the level of enablement is way beyond the value of the loans and drawings. For example, what value could we assign to ensuring that Gaia U continues for another decade? And how about that cooperative house purchase for the young cooperators?

There is a lot of power to be found through relatively small acts of cooperation like this.

This is another project designed by Woody, and it has a small, close membership. Andrew is in as is Liora. Otherwise, there are two more members.

Here are the withdrawing rules (Icefall is a Limited Liability Partnership, similar to an LLC in the USA and has a set of rules filed with UK Companies House):

18. Drawings

(a) Notwithstanding clause 13 (a) all members shall have a conditional entitlement to draw down some capital from the common pool for application to personal needs or projects. The protocol for handling requests to make such drawings shall be as follows:

(i) All requests shall be heard by a meeting of members duly called or shall be agreed by unanimous written assent as provided for in clause 11 (o).

(ii) Any member may in principle drawdown up to £1,000 in any calendar year but is required to explain the intended application(s) and to listen to the views of other members.

(iii) Any member may ask to draw down up to a further £2,000 in any calendar year. After explanation and discussion, one-half of other members present must be willing to endorse the withdrawal.

(iv) Following the same procedure, a request by a member to draw down up to £5,000 in any calendar year in addition to drawings approved under subsections (ii) and (iii) above shall require the assent of three-quarters of other members present.

(v) Requests by a member to draw down more than £8,000 in total in any calendar year shall require unanimous assent.

(b) Any request to draw down socially dedicated capital for application to social, political or charitable purposes shall be subject to the procedures and approval thresholds set out in section (a) of this clause. In addition, the proposing member or members shall be required to explain the merit and needs of the social project(s) to which the capital is to be applied.

Next steps – the Icefall papers are available for interested parties – send a request to postmaster@gaiauniversity.org

Slicing Pie

A common issue around starting enterprises, especially with less than adequate financial capital, is that we need other people to help. Then we need systems that allow us to compensate our helpers (who contribute various forms of capital) even if we do not have the money to pay them.

This issue is often resolved by giving contributors rights to a share of the future profits and/or rights to a future share of the equity in the business.[49] Equity, for this purpose, means the value of whatever has been invested in getting the enterprise up and running.

The conventional way has been to allocate a fixed percentage of the equity to each investing contributor. However, this approach leads to many problems and, frequently, a lot of tension. Consider a situation in which one of the people who made an early investment (of time, of cash, of intellectual or social capital and so on) turns out not to have the capacity to continue on in the business and who has an agreement with you to take 25% of the value of the equity when they go. It may well be that this percentage looked about right at the start, but that over the following months, as this person was unable to contribute according to expectation, the percentage now looks far too generous. Add the likely factor that the cash to pay this out is not there. Now you have to renegotiate this percentage downwards. That's tough to do and can soak up a big amount of time—and also cause bitter arguments and ruptures.

The latest thinking is to work with a form of dynamic equity, the value of which is recalculated every month or quarter according to a set of clear agreements. This approach, the Dynamic Equity Split, has been detailed well in Mike Moyer's book, *Slicing Pie, Funding your Company without Funds*. That certainly looks interesting and relevant!

[49]We may even be tempted to enroll people as partners (without yet knowing how well we work together). Slicing Pie helps us avoid these over-commitments and allows us to retain control until such times as we know that opening involvement is a good step.

Slicing Pie involves the use of clear rules of how to value certain inputs of various forms of capital. It looks as if it should easily adjust in order to value all the Eight Forms we are familiar with, but that remains to be seen. At convenient intervals (monthly or quarterly) the theoretical value[^foot28] of the company is calculated along with the share belonging to the contributors. The percentage of a share attributed to any one contributor will vary from period to period, depending on what the person has put in.

To get an overview of how this system works download the spreadsheet here[50], look at the video here[51], and see if you can follow the essentials of the approach. It is a complex system largely due to the idea that certain inputs are multiplied by factors to compensate for the risks being taken. For example, a person taking out $15 per hour in a role that is valued at $25 per hour is in effect, contributing $10 per hour of equity into the business ($25 − $15 = $10). This equity is 'at risk' (if the business flops, as many of them do, there will be no money to pay out the extra, so the worker is at risk of never being paid this portion).

According to the Slicing Pie logic, the business adds it into the theoretical equity at twice that face value (that is, at $20 per hour) to compensate for that risk.

It is a fascinating design, and it answers many of the previously intractable issues facing start-ups that need to find at least some of their working capital 'in kind' from coworkers. It is also completely flexible in that we could adjust the factors for risk-taking if we chose to.

To my mind, this is the kind of innovative system that is worth studying just enough to follow the general concepts whilst not sweating over the details (unless we need to bring it into use right away!).

The next challenge is to see how to use Slicing Pie concepts with a

[50] http://slicingpie.com/the-grunt-fund-calculator/
[51] http://slicingpie.com/slicing-pie-for-the-small-business-centr/

mutual ethic…??

Raising Financial Capital

This page sketches out several of the promising options for raising financial (and other forms of) capital…

Why these options are important

Since the 2008/9 crash the normal lenders of society, the banks, have repeatedly reneged on their responsibility to loan money into productive manufacturing and agriculture except for large schemes that are guaranteed against loss by governments using taxpayers' money. Banks now prefer to invest in financial devices (derivatives and the like), real estate and corporate takeovers and bye-backs. These are all fields of investment that make money but produce nothing.

Small businesses and small farms (unless the farmer owns the land[52]) are often struggling for survival in a context of cash and credit scarcity.

We, therefore, likely need to use other means to raise working capital.

Recent developments (made possible through the internet) include:

Crowdfunding through which people raise lump sums to initiate projects. See We The Trees[53], a dedicated permaculture crowdfunding site. There are several more sites to look at.

Forms of **patronage** through which people raise a steady flow of funds to support ongoing projects. See Patreon[54] a site designed

[52]Landowners can use the value of the land as collateral and possibly obtain loans. However, contending with climate change (drought and floods) often means that farm profits disappear leaving farmers with debt and vulnerable to foreclosure (the lenders take the land to settle the debt). The world is seeing a sharp and sustained increase in the number of farm foreclosures (and the number of farmers committing suicide). We could interpret this as one of the biggest land grabs in history.

[53]http://www.wethetrees.com

[54]https://www.patreon.com

originally for creative artists but also in use by creative permaculture people[55]. This is the only site of this type we know of (let us know if you know about/ find others).

Peer-to-peer lending – see this on Wikipedia here[56] and investigate sites yourself (read reviews first!)

Also of interest to people in the USA are the new opportunities arising from Direct Public Offers (DPO). Recently the government of the USA has opened the doors for small and medium enterprises to solicit funds from people in their circles who are not registered investors. See Jenny Kassan's website[57] for more information. Jenny is a friend of Gaia U and is a leading figure in the DPO world. We're booking her to run a Gaia Radio show specifically about raising money for mission-driven projects (the name given to our type of work). Watch our newsletter for details.

Jenny works closely with LIFT Economy[58], a USA based consultancy staffed by permaculture people focused on supporting the development of ecosocial enterprises. Check out the resources on their website, too.

Other links of value

The sharing economy[59]

The solidarity economy[60]

Complementary Currencies[61]

[55] https://www.patreon.com/AvaPermaculture?ty=h
[56] https://en.wikipedia.org/wiki/Peer-to-peer_lending
[57] http://www.jennykassan.com
[58] http://www.lifteconomy.com
[59] https://duckduckgo.com/?q=sharing+economy+websites&t=h_&ia=news
[60] https://en.wikipedia.org/wiki/Solidarity_economy
[61] http://complementarycurrency.org

World Context

The World System Dominates

One important point of view is that our efforts towards creating our regenerative livelihoods and enterprises are taking place in a context. One analysis of this context, developed and detailed by Immanuel Wallerstein and colleagues, considers the context to be a world-system. The analysis emphasizes a world-system rather than nation-states in order to raise our consciousness about the international (globalized) nature of trade that has been developing since at least the 10th Century.

Already you can see this is unusual. It is more common to see analyses that imagine that our current international economy emerged after World War One or, even, after World War Two. According to Wallerstein, colleagues and critics offering these near-past analyses fail to show how the current world-system has much earlier roots; and, therefore, when we seek to dismantle its peculiar logic, we might just be deadheading the spent flowers rather than digging it out by the roots.

World Systems Theory[62][63] shows how countries are categorized (primarily by a form of political and social design) into groups of Core Countries, Semi-peripheral Countries and Peripheral Countries where the divisions, inclusions and exclusions are determined largely by the dominant Core Countries.

This means that a country in the peripheral category, for example, has its economic functions in the world-system predetermined by the Core. Typically this means that it is confined to the role of

[62] https://www.boundless.com/sociology/textbooks/boundless-sociology-textbook/global-stratification-and-inequality-8/sociological-theories-and-global-inequality-72/world-systems-theory-429-537/

[63] Until quite recently World Systems Theory was accessible only through a Three Volume exposition. Thankfully there is now a short introduction available (since 2004) – World Systems Analysis This is a worthwhile read for anyone seeking to understand how our own efforts fit (or don't fit) into the template provided by the dominant Core.

extracting and exporting low-value raw materials that are then converted into added value products elsewhere (often by Corporations owned in Core Countries using cheap labor in Semi-peripheral Countries). These added value goods may then be sold back at high prices to the countries that provide the cheap raw materials and the low-cost labor.

It is, according to this theory, deeply challenging for Semi-peripheral and Peripheral countries to reformat their economies in order to become more self-determined and self-resilient as the Core frequently reacts with deadly hostility whenever such attempts are made[64]. So-called Trade Agreements such as NAFTA[65] (North American Free Trade Agreement) and the proposed TTIP[66] (Transatlantic Trade and Investment Partnership) are examples of how the Core uses institutional powers (violence) to suppress dissent and promote increasing power.

We might just as well be looking at a social class system here in which the roles and functions available to a person are often determined (if not in whole, at least in part) by the social class[67] in which they are born and raised. And, with a little imagination (and some awareness of the fractal nature of patterns that has them showing up at many levels) we could also notice that the class system patterns and the (deeply connected) World Systems patterns also show up inside countries.

That is, under the logic of the existing World System, rural parts of a country are ascribed peripheral functions by the larger cities whilst market towns show up as semi-peripheral elements. This means

[64] https://ellenbrown.com/2016/03/13/exposing-the-libyan-agenda-a-closer-look-at-hillarys-emails/

[65] https://en.wikipedia.org/wiki/North_American_Free_Trade_Agreement

[66] https://en.wikipedia.org/wiki/Transatlantic_Trade_and_Investment_Partnership

[67] There are other factors too, like gender, race, immigration status and many more. The argument here is that the class system is the parent system for constraint and discrimination whilst gender and race, for example, subtend from the class system. All of these factors need eliminating (the Gaia U brand of this work is called 'Seeing off The Patrix') as we go forward. Together they constitute a significant barrier to the emergence of intelligent, eco-socially regenerative (and non-oppressive) cultures.

that rural areas and market towns do not have a great deal of power to determine their future unless they can muster the sustained energy to contradict and resist their dominant, larger neighbors.

Likewise, Counties, States, Cantons and other local geopolitical boundaries divide countries up into Core, Semi-peripheral and Peripheral zones.

The Climate for Regenerative Enterprise

By creating our own livelihoods, we are choosing to make a constructive intervention towards ecological and social regeneration and away from unscrupulous domination of the World System by the Core. It is helpful to understand that, as micro, small and medium enterprises[68] we are, whether we intend it or not, a counterforce that can expect very little help and probably some hindrance[69] from the mainstream.

This is an important point to note as many of us (and our family and friends) imagine that, as small businesses do so much to assist local economies to adapt and grow[70], there would be plenty of agencies with a good deal of resource on hand to support us.

That's not the case. Research in the USA[71] indicates that 90% of cash earmarked for economic development goes to large national corporations despite small business providing the majority of new jobs in most areas.

[68] https://en.wikipedia.org/wiki/Small_and_medium-sized_enterprises

[69] Hindrance is often in the form of rigid interpretation of zoning regulations, food safety regulations and other local government constraints. That said, see this creative success in seeing off the Inspectors.

[70] The European Bank of Reconstruction and Development describes Micro and SME's as "the engines of transition" and notes that small business people exhibit agility and resilience that enables them to develop into niches that go unnoticed by larger enterprises. Despite this clear understanding the ERBD, like the agencies in the USA, still delivers its assistance mainly to large corporations as does the World Bank.

[71] http://www.yesmagazine.org/new-economy/why-do-we-give-breaks-to-huge-corporations-when-we-could-invest-public-money-here-instead-20160506

It may be demoralizing to know about yet another means whereby the Core captures the money at the expense of those of us who should expect some help, and yet it is also helpful to tailor expectations to match reality.[72]

It is for this reason that self, family, friends, and community are such important sources of the various forms of capital essential to initiating an enterprise. All these informal sources of capital (other than your own) rely on good reserves of social capital, and it may well be that we have to attend to becoming respected in our networks as a first step.

It is also the reason why it is critical for us to build our own supporting regenerative livelihood infrastructures (of the kind found in the LL Book on Community and Relationships) and find genuine allies from amongst other folks committed to regeneration.

Unless We Create Remedies

Strategies for escaping the debilitating pull of the World System on regions, countries, and communities require at least two modes of action,[73] both at the same time.

The first is the creation of constructive policies and projects that contradict the apparently inevitable outward flight of power. The second (and more subtle) is the elimination of hidden, internalized attitudes, beliefs, and orientations that unwittingly support central-

[72]It's not all dark. Sometimes grants and low-cost loans do show up, usually for confined categories of applicants (such as people who can show that they are disadvantaged in a particular way). It is worth at least inquiring to see if we fit the categories. We might still decide not to go ahead after looking at the requirements for applying. For example, beware the call for a 40-page business plan for grants of less than $500 (use your own figure) if you could go earn that much in a week (use your own figure) working casually for a friend…

[73]Prior to action comes conscious knowing (and, before that, conscious unknowing). Then comes leadership focused on organizing a gathering of people inclined to give their efforts to both the task of resisting flights of power and the task of supporting projects that bring power back to Semis and Peripherals.

ization and the accumulation of power in the Core.[74]

There are millions of examples of the former constructivist projects mostly at the community level, and in this chapter, we showcase an unusual one as it operates at a senior level of governance. It could, therefore, be regarded as significant at the world-system scale. Schemes at this scale are much needed, and we will continue to seek out examples.

The Bank of North Dakota

Consider the Bank of North Dakota. This is the only State-owned central bank in the USA (all the other States use Wall Street and the Federal Reserve Bank to raise their money). The performance of the state-owned bank is spectacular, and its contribution to the local economy (including its ability to support more local banks and credit unions to partner up for bigger loans than any of them could handle on their own) is significant.

According to this article[75] in 2015, despite the failing oil industry in the area, the BND propped up the state economy whilst also introducing new infrastructure programs to improve access to medical facilities, remodel or construct new schools, and build new road and water infrastructure. The Farm Financial Stability Loan was introduced to assist farmers affected by low commodity prices or below-average crop production. The BND also helped fund 300 new businesses.

One factoid in the article that summarizes the tale is that the costs of borrowing money at least double the cost of installing infrastructure and, if that money goes out of State (as it does in

[74]During my primary schools years (1955 to 1960) Totnes and the surrounding rural area was an administrative center in its own right (Totnes and Rural District Council) and ran the local Livestock Market, a major infrastructure element in the town. All manner of supporting businesses (blacksmiths, agricultural machinery engineers, butchers, publicans and café owners, lawyers, realtors, veterinarians, compost makers, market gardeners, auctioneers and many more) thrived due to the weekly gathering of farmers and their customers. The Pannier Market (selling crafts and produce) also did well as it ran at the same time.

[75]https://ellenbrown.com/2016/05/02/bank-of-north-dakota-soars-despite-oil-bust-a-blueprint-for-california/

every other state than North Dakota), it clearly shows how the Periphery finances the Core.

The author of the piece is Ellen Brown, an attorney and founder of the Public Banking Institute.[76] She is the author of twelve books, including the best-selling Web of Debt,[77] and her latest book, The Public Bank Solution,[78] which explores successful public banking models historically and globally. Ellen uses the article to propose a similar bank for California where she stood as State Accountant in 2014. Add her to your list of people to follow by signing up to her blog[79] and keep up with the Public Banks campaign.

After a political reconstruction that lumped Totnes into a 'District' with other towns and in the interests of 'modernization' of the Livestock Market along with upgrading the 'quality' of the town as a tourist attraction, the Livestock Market was first moved to a peripheral industrial zone where it failed within five years (cold, drafty, isolated and unpopular with the users) and was thus moved to the next largest town. It failed there, too, and moved to the County seat where, in 2009, it closed for good.

Whilst the beginning process was controversial, significant numbers of the town's people supported the moves (cleaning up the town for tourism) due, I think, to an internalized sense of inferiority. That is, they felt hurt by the imagined (and real) projection from visiting city folk that Totnesians were somehow backward due to their connection to the land. (There is also the possibility that some local landowners supported the changes as they then would benefit from the development opportunities arising from the now redundant real estate previously occupied by the Livestock Market).

Both the internalized oppressions (of being thought to be hicks, rednecks and otherwise mentally challenged by an essentially urbanist society) and the culturally approved avarice of the landowning few

[76] http://www.publicbankinginstitute.org
[77] http://www.webofdebt.com
[78] https://ellenbrown.com/books/the-public-bank-solution/
[79] https://ellenbrown.com

took the heart from the town.

More World-System Scale Remedies

We'll add the Alaska Permanent Fund to the list of world-system scale projects with ecosocial significance. This project speaks to two distinct aspects of a new economy, an economy that would support the transition away from ecosocially destructive activities (destructoculture rather than permaculture) towards our desired ecosocially regenerative culture.

The first of these two aspects is known by several names and involves schemes that provide all peoples, without exception, with a basic income sufficient to get by on (frugally) and then allows them to top this basic income up with earnings and without penalty up to a certain threshold. This proposal has a long history (since the 17th Century – see this site for an extended version of the story[80]) and is gaining ground given that the need to thoroughly transition our societies is becoming ever clearer.

A guaranteed minimum income, no questions asked, could be one of the best possible devices (along with universal health care) to reassure folks whose destructoculture livelihoods must go, that they will not be thrown on the trash heap and abandoned.

The second aspect of significance is the embodied philosophy that natural resources (in this case, oil but extending to clean air, sea-lanes for shipping, land, soils, radio spectrums and much more) belong to the Commons and, as such, the bounties resulting from the use of these, should be repaid to the Commons. This 'land tax' would then be plenty to use to support the enhancement and transition of a healthy society.

This 'Land Tax' (or 'Single Tax'), too, is an idea that has been around for quite a while. Adam Smith, writing in *The Wealth of*

[80] http://basicincome.org/basic-income/history/

Nations, 1776, supported the notion. It became a cause celebre at the turn of the 19th to 20th centuries due to the analysis of Henry George of San Francisco, USA, who wrote a bestselling book, *Progress and Poverty.* It almost became law in England in 1916 and is currently supported by contemporary luminaries such as J.K Galbraith, George Monbiot, Deirdre Kent, and Joseph Stiglizt.

See this slide show[81] for a quick overview of the argument and this article[82] for a deeper look (including an exposé of a three-decade-long misinformation campaign funded by wealthy landlords - where land stands for any asset in the Commons – to discredit the logic of the argument by obfuscating and ruining the field of economics).

These two aspects (Guaranteed Basic Income and Land Tax[83]) are interwoven in Alaska. Money from the state's oil revenues, which can be considered a rent paid by the oil extractors to the community, is collected, invested and the resulting income divided amongst Alaskan residents.

Here is the descriptive text of the Alaskan scheme, taken from the Basic Income Earth Network website.[84]

The introduction and development of the only genuine universal basic income system in existence to this day took place many leagues from these debates. In the mid-1970s, Jay Hammond, the Republican governor of the state of Alaska (United States) was

[81] https://www.slideshare.net/deirdrekent/why-land-value-taxes

[82] https://www.progress.org/articles/how-land-barons-industrialists-and-bankers-corrupted-economics

[83] **Basic Income and Land Tax are companions** – an effective land tax would encourage landowners who take land out of production (an estimated 50% of the Capay Valley where Andrew lives is in this category) to sell at least some of the land rather than hoard it all, thus lowering land prices and opening up space for young farmers seeking to make a living from the land (during which time the basic income would be a great help). This is a kind of usufruct policy – whilst the land is in productive use the farmer can afford to hold on to it, but once it falls idle it becomes a significant drain on resources. All in all, we are proposing a kind of popular agrarianism in which low-income households live a resilient and lovely lifestyle through a) receiving basic income and b) having access to enough land to be self-reliant (to about 60%) in food, fibers, medicines, and fuels.

[84] http://basicincome.org

concerned that the huge wealth generated by oil mining in Prudhoe Bay, the largest oilfield in North America, would only benefit the current population of the state.

Hammond suggested setting up a fund to ensure that this wealth would be preserved, through the investment of part of the revenue from oil. In 1976, the Alaska Permanent Fund was created by an amendment to the State Constitution. To get the Alaskan population interested in its growth and continuity, Governor Hammond conceived of the annual payment of a dividend to all residents, in proportion to their number of years of residence. Brought before the United States Supreme Court on the grounds of discrimination against immigrants from other states, the proposal was declared in contradiction with the "equal protection clause," the fourteenth amendment of the Federal Constitution.

The proposal was modified to overcome this objection, and transformed into a genuine universal basic income. Since the implementation of the program in 1982, everyone who has been officially resident in Alaska for at least six months – currently around 650,000 people – have received a uniform dividend every year, whatever their age and number of years of residence in the state. This dividend corresponds to part of the average interest earned, over the previous five years, on the permanent fund set up using the revenue from oil mining.

The fund was initially invested exclusively in the state economy, but later became an international portfolio, thus enabling the distribution of the dividend to cushion fluctuations in the local economic situation instead of amplifying them (Goldsmith, 2004). The dividend stood at around $300 per person per annum in the early years but was close to reaching $2000 in 2000, when the stock market plummeted and cut the dividend in half in the course of a few years. In 2008, however, the size of the annual dividends reached a new all-time high with payments of $2069 per person.

Alaska's oil dividend scheme has repeatedly been proposed for

other parts of the world, but still remains unique. It helps make Alaska the most egalitarian among USA states.

Introducing Import Replacement

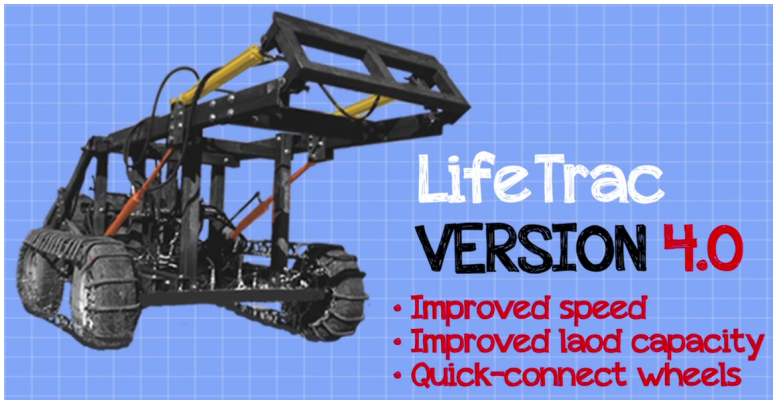
Taking a strategic look at what is imported to a region (imagine a cordon around any village, town, city or region and imagine knowing what flows across the border of the cordon) and then working to replace those imports (or, with hybrid systems, replacing some elements of these imports[85]) with locally sourced labor, land, materials and capital is one route towards generating increased local economic activity whilst actively reducing all manner of negative footprints (carbon/energy, ghosts acres, waste streams, colonialism …).

Conker Shoe Company was founded using this notion. Totnes, Devon, England with a population of 8000 people all of whom buy, on average, 1.5 pairs of shoes a year (of whom, by the way, 40% can't find shoes that fit - inside information gleaned from working for Clarks Ltd.) has a market for workshop-made shoes approaching 8000*1.5 = 12000 pairs a year. Given that a shoemaker can make 11

[85]My favorite example of a hybrid import replacement strategy was the Africar. The car design centered around independent drive wheel assemblies driven by hydraulic motors that received their energy from a conventional gas-powered engine under the hood. The bodywork was hand-built in plywood. Several prototypes were built, and the concept more or less proven. The manufacturing concept is what's important here. Most of the high tech component (wheel assemblies, engines, gearboxes, electronics… require a well developed industrial economy; and would, therefore, need to be handled by regional scale manufactories. The bodybuilding and assembly of components to turn the bits into cars, pickup trucks, ambulances and so on) requires boat building skills of the type that a small workshop in a market town could readily handle.

pairs a week[86] the demand could provide livings for 20+ shoemakers full time (working 48 weeks in a year). A 20+ person workshop is a delight to work in. The positions are all additional, regenerative and convivial livelihoods that add significant resilience to the local area by replacing previously imported goods.

See also this extraordinary project at Open Source Ecology[87] where, amongst other experiments, prototype tractors (The LifeTrac, see below) suited to small-scale workshop production, are designed and built. Imagine the potential of this project to replace imports.



Standard regional planning textbooks would have it that you need a region of at least 150 million people to support a tractor factory. The Open Source Ecology changes that dramatically and, a guess would be that a population of 100K people (assuming 5% in agriculture)

[86]Eleven pairs a week – Andrew was privy to a 1974 verbal report from a director of Clarks Ltd (an international shoe manufacturer which was, at the time, manufacturing 90% of its production in small towns in the West of England). The director had visited India to look at outsourcing possibilities (this was just after the Organization of Oil Exporting Countries, OPEC, flexed their new found powers of sovereignty over their mineral resources causing oil prices to increase rapidly. This episode accelerated the outsourcing of manufacturing from countries in the Core of the World-System to semi-peripheral countries, a process that continues today). The shock information was that Indian shoemakers, operating from small two and three-person workshops in downtown marketplaces, had an overall production and sales output that was the same as the sophisticated factory and logistic systems operated by Clarks – 11 pairs a week per person. Bang went the notion that modern Western manufacturing and logistics is necessarily more labor efficient than small-scale workshops. An inspirational eye-opener!

[87]http://opensourceecology.org/wiki/Factor_e_Farm

would be sufficient. But, also note that if there is not enough work to keep busy making LifeTracs the same workshop could also build Africars for a while.

This is a crucial point. All of the data used by professional planners in all of the government offices of the world doing regional planning assumes conventional, centralized forms of production. No-one at that level imagines that food production, shoemaking, vehicle manufacture and any other form of production can be rescaled to work at a more local level.

Consequently, the locations on the maps for facilities plus the transport and logistics infrastructure are all planned in such a way as to more or less force the conventional scales. This we need to change – the next step is to write the Permaculture Regional Planning Handbook!

This type of manufacture could divert 50% of the value of building vehicles into local economies whereas the current situation only allows local economies the retail margins on the sale on internationally produce vehicles. A fresh look at this project using modern lithium batteries and electric powered drive trains is in order.

Activities

Descriptions and Links

Examples of world system-scale changes towards ecosocial regeneration are in short supply (although the agreements at COP 21 in Paris may well prove to be significant). There is usually more joy to be had by looking for working examples at a more local level. This activity involves each of us posting brief descriptions and links to projects that we know of or find are significant beyond their immediate locales.

The Two Challenges

Andrew invites us to consider two challenges regarding income and credit at the community scale – forming income solidarity communities and working up capital sharing clubs.

What do you like about these ideas and what do you find challenging about them? Do you have alternate visions as regards income and credit at the community scale and what would be your next achievable steps towards ensuring your visions become active projects?

Import Replacement/Added Value

Import replacement is presented as a promising concept to help us find those streams of goods and services we import into our areas. A question is, where is the data?

For example, there was a proposal from a recent CRL associate to make soap locally. What data can we find regards soap use in our chosen community and can we use this data to infer a number of livings that could be made if we produced soap (and/or soap making kits) locally?

The opposite of import replacement may be adding value to raw materials before they are exported from our area through which means we can increase our margins on sales.

Consider your own ideas of livelihoods. Do they fall into either of these categories and what data can you find (do you know about) that will give you some leverage on the task of working out what scale of enterprise you can develop?

Final Reflections on the Chapter

What are your reflections arising from your experiences with the whole of this course? Five lines or more are welcome.

Chapter 3: Managing Time, Managing Promises

Why this topic and why now?

Patterns, distresses…

Many of us have issues around managing time and, perhaps more importantly, we struggle with promises. This struggle might look like "dropping the ball" in which we do not deliver what we said we'd deliver on time: we might often arrive at appointments late, we are overcommitted, we are often in a rush…and so on. Or in the opposite way, we might be so "scheduled" that there is no room for play and spontaneity in our lives.

There are many reasons why we might have these patterns, patterns that generate drama and stress. It is a goal of Gaia U to support each of us to become clear about the patterns we carry in relation to managing time and managing promises, and to work on eliminating these.

In the first place, we'll hold on to the understanding that none of these patterns is anything to do with the essential us. None of us have a fundamental character flaw, personality defect or intelligence challenge that means that our time issues are hard-wired or permanent. Instead, what we have are learned distresses

and/or avoidance busy-ness[88] patterns.

Secondly, inside Gaia U, we function with a progressive approach to timeliness that emphasizes self-pacing in which we progress from first following the pace and rhythm of the Orientation towards an entirely flexible timeline of our own during the autonomous project phase of our program.

Orientation phase

During the Orientation phase we make every effort to keep aligned with our cohort (it's much more fun and productive that way) AND we also know that we can skim some content (and come back to it later), offer two-line forum posts, leave some content out entirely for now and join in with the next cohort to get that module later; or even, back-out of the Orientation this time around and restart at another time. All this means we do not need to feel guilty, pressured, panicked or bad about ourselves if we don't keep up.

What we do get instead is a sharper picture of our distresses and seeing this picture stands us in good stead to work on eliminating these distresses.

Autonomous project phase

This is the longest phase of a Gaia U program by far, and during this phase, we have complete freedom to choose when to deliver Output Packets, the products that earn us credits (more about OP's later). The Gaia U OP Bus arrives at the bus stop on the first of each month, and we can jump right on or wait for the next one (we will have made an agreement with our main advisor ahead of time to tell them which bus we expect to catch. This enables our

[88] An avoidance busy-ness pattern functions to keep our attention away from memories and issues that we do not have the willingness or capacity to deal with at the time. We keep our attention 'out' by keeping busy. Sometimes we think (perhaps unconsciously) that this busy-ness strategy will function indefinitely although the general experience is that the underlying issues will persist in and insist on showing up demanding attention. A more complete strategy would enable us to a) keep our attention out when necessary to get the job done and yet also b) have time set aside (once or twice a week), a good method on board, and support allies to hand so that we can indeed explore and resolve the hidden issues (this is an outline of the Re-evaluation Counseling approach).

advisors to plan their work schedule AND, if we need to change this commitment we can do so just so long as we do it ahead of time).

By these means, being i) advisor supported self-selection of commitment dates and ii) freedom to renegotiate commitments ahead of time, we become ever more skilled and powerful in our capacity to manage our time and manage our promises.

Bigger reasons for this work

Are we a realistic option?

The Gaia U proposition is that we need good capacities for managing time and managing promises within our community so that we can show up as a realistic option for the future.

As the current World System collapses, it generates intense competition to establish what the future looks like. Large numbers of people (who have not had the privileges of time, education and other resources necessary to scope out the future – see next section) will be convinced to go with whatever shows up in the media whether or not it makes ecological or social sense. People are frequently persuaded by propaganda campaigns to go with systems that are directly contrary to their interests. There is plenty of historical and contemporary evidence for this.

The meta-tasks

In these transitional and chaotic circumstances we have three complementary options, all three of which require good managing time and managing promise skills to come about:

- To bring our **proposals** (which *do* make ecological and social sense) **into viability** so that people can recognize them as genuine possibilities. Viability means that people can make good-enough livings this way and even experience *buen vivir,* a term increasingly in use in Latin America to describe a low consumption, high value,

ecosocial lifestyle (*buen vivir* is a Spanish Latin translation of *sumac kawsay,* a phrase from the cosmology of the Kichwa people, indigenous to Ecuador – see this link[89]).

- To assist ourselves and others to be able to think well enough to notice that, even if our systems are not complete as yet, **they still make the most sense and that investing in developing these systems is the smart strategy**. In this respect, we are our own examples. Each time we get to think a little better, can commit a little more intelligence, organization, and energy towards constructing an ecosocial future, we are learning what we want everybody else to learn. In effect, we are taking the lead and preparing ourselves to mentor people who come along a little later.

- To learn how to **work with the other**, **diverse communities** of practice around the world who have committed to develop and hold the parts of the picture that so far have eluded us. (Say, for example, the people who know how to dismantle the memes of racism, sexism and the like and/or who have a developed view of how a truly participatory economy can function).

Showing up as effective (yet relaxed)

It is when we open the possibility of working with other people that good skills and attitudes around managing time and managing promises truly become critical. No-one will want to work for any length of time with "flakes." Flakes is an English term, common in the USA, for people who:

- can't make useful promises
and/or

- don't do what they say they will do
and/or

- don't let you know that they cannot manage to deliver until it is too late for you to take action to cover for the contingency they have caused.

[89] https://www.indybay.org/newsitems/2010/02/28/18639072.php

On the other hand nor will other people want to be allied to folks who are desperate to "get things done" (without allowing the necessary time to think well about what to do) and come across as being "driven" by their desperation.

Our challenge then is to show up as effective (able to make promises that we can manage well) whilst being relaxed and present (not desperate). In Gaia U we often use the blended ideas of **competence and attention** to describe this sweet state of being.

A liberation perspective

On our privileges to scope out the future:

It appears as if the whole process of visioning, working out the next steps, developing projects, bringing dreams into reality, choosing a life's path…that Gaia U is promoting is only available to people who have managed to escape the most intense oppressions in our cultures. That is, large numbers of people in our cultures are unable to think and act in visionary terms because they are convinced (by a process known as internalized oppression) that they neither have the intelligence to do so, nor the permission.

It is thus part of our job to find out how to become good allies to people submerged by internalized oppression and to support them to become powerful actors with choices to make. It helps that some of this (disempowerment) may be (it always is) true for us too.

Even though we might have our heads above the water in this wide ocean of disempowerment, and can, therefore, see the blue and the stars in the sky, we are also still in the liberation process ourselves and might have some way to go before we are completely willing to take full charge of the future. Whatever helps us continue with our own liberation can also be what helps others to work on their liberation too. We simply need to notice and document our own successful liberation processes and then support other people to find and sustain theirs.

Indigenous cultures managing time

Whole societies (especially indigenous societies) have functioned and continue to function (when permitted), with sophisticated (but often dismissed) systems for managing time and managing promises.

These cultures are/were deeply purposeful, capable of long-term, multigenerational perspectives, acted in timely manners to natural phenomena and more and at levels way beyond the current desensitized (post) industrial culture of the World System.

Consider, for example, the Tzutujill Mayan culture described by Martîn Prechtel (*Secrets of the Talking Jaguar, Long Life, Honey in the Heart and The Toe Bone and The Tooth*). Martîn describes in detail, from the perspective of an active participant, the civil and shamanic dimensions of this ancient culture in Guatemala including documentation of their timely purposefulness.

See also Kat Anderson's significant and scholarly work *Tending the Wild* that importantly reconfigures our understanding of how the Native American cultures of what is now California, USA lived in balance with nature for millennia (before the arrival of the Europeans), whilst all the time significantly modifying the landscape through burning, seed collecting, species selecting, cultivating and planting, coppicing, pruning and more.[90]

The extensive collection of evidence presented in Kat Anderson's important work roundly contradicts the European invader's (that's us) self-serving and prejudiced view that First Nation people simply (and, the implication goes, lazily) just took from what nature provided without making any significant input themselves.

Both these sources show that these indigenous cultures were highly strategic, purposeful and structured. They involved whole soci-

[90]The perspective argued in *Tending the Wild* is bolstered for us when one of our External Reviewers, Lee Klinger, presents his work on healing sudden oak death (a major problem in northern California, USA and now moving south). See his website here. Podcast to follow.

eties thinking ahead (by at least seasons and frequently by multiple years and generations) and inventing and maintaining multigenerational solutions to problems arising in the emergent dynamics of the ecosystems of which they were an intimate part. And, in California at least, the ecosystems are challenging as they move in and out of unpredictable 70 years droughts and severe flash floods.

This would have them engaging in extensive and creative engineering with natural materials and human labor to meet the complex demands of digging, planting, harvesting, weaving, sewing, container making, long-term food storage, cooking without metal pots and more. These strategies included (in the case of the Californian natives) a sophisticated understanding of how to use fire in the landscape for multiple purposes including the extension of the life of productive oaks from 120 years to 600 years.

Likewise (as in strategic, organized, and drawing on multiple intelligences) they practiced simple, systematic and speculative tracking for successful hunting. See here –Art of Tracking[91]– for a detailed description of these practices and the observation that tracking represents the earliest evidence of scientific thinking in humans.

These people also knew how to time their arrival at remote stands of fruit, seeds, flowers and so on at the precise time when their interventions would be the most productive and effective and would coordinate together in appropriately-sized groups to head out to take care of the job.

Overall then, the picture is of purposeful, organized, scientific (and also mystical) and coordinated cultures that work(ed) towards meeting their own needs AND sustaining a productive and diverse nature.

These cultures functioned with careful attention to phenomenological timing and with an acute, collective capacity to observe the effect of their interactions with their environment and alter

[91] http://www.cybertracker.org/tracking/the-art-of-tracking

practices to achieve their (holistic) goals through processes of induction, deduction and imagining long-term outcomes.

And, for individuals during their lifetime of deep involvement with their culture, with mentoring assistance from their peers and elders, the expectation was/is of a thorough and complex transformation of self over time.

Our intention

This sounds very much like the orientation of a purposeful, eyes-wide-open, transformative action un/learner and it is this many-faceted, complex flavoring that we are seeking to promote in our Managing Time, Managing Promises approach.

Lee has gathered evidence to show that large, acorn-producing oak trees were kept alive and healthy for hundreds of years (when the natural lifespan might be more like 120 to 150 years) -through indigenous interventions (burning out competing understory plants, generating fertility flashes also through burning, adding calcium by way of seashells to acidifying soils, burning out rotting heartwoods to avoid the rot spreading to cambium layers…).

This work maintained the oak savannah ecology in California, prized by the Native Americans as it generated staple protein/oil supplies. This savannah was a deliberately arrested succession as, without human intervention, the oak forest would naturally give way to much less hospitable pine forest. The work of maintaining such a stable, productive ecology requires coordinated action down multiple generations (20 + generations) and clearly indicates a way of thinking that can hold onto intergenerational responsibility.

World context revisited

In Gaia U, we recognize that there are multiple reasons why we might fall over around managing time and managing promises.

Some of these are to do with the times we live in, some to do with the patterns of our cultures and communities and some to do with our individual approaches.

The times we live in

According to our observations the dominant culture on the planet, the white man's neoliberal capitalism, is in terminal decline, thus tending at the edges to the chaos and, in extreme zones, the disorder typical of collapse. We are likely, therefore, through no fault of our own, to find it confusing and difficult to function well in such a context and that confusion will often be accompanied by chronic feelings of anxiety and fear of the future.

Confusion, fear, and anxiety can all be transmitted by contagion. If those around you are in these states you can 'catch them' too (and also transmit them) (Lilianne R. Mujica-Parodi et al. – *Second-Hand Stress: Evidence for Human Alarm Pheromone* – 2008[92])

Our best approach, in this case, is to work on eliminating (probably by discharge, by meditation, by nature connection) the feelings of anxiety and fear. It is clear that the chaos arising from shifting through collapse to renewal in the World System is not going to go away for quite a while yet!

Indeed it may well get louder.

Tom Henfrey of The Schumacher Institute adds: *"I saw a presentation by Dennis Meadow recently in which he suggested that the crises are likely to be most intense at and coming up to the peak, as this is where the dominant system has most momentum and therefore where the corrective responses need to be largest in magnitude. I'm not sure whether I believe it, but it's an interesting perspective that I'd not heard elsewhere."*

[92] http://precedings.nature.com/documents/2561/version/1

Our individual approach

By turning up in Gaia U, we are all already making a clear statement that includes the following ideas and commitments:

- we are ready to work out how to rise to the challenges of navigating through and designing for major world system change,

- we want to learn how to keep thinking and acting well amidst any chaos that might arise,

- that we have some good ideas of what such thinking and acting looks like,

and

- we are holding a hopeful and optimistic view that, through the application of human intelligence (our intelligence) we can turn this disaster scenario into a wonderful opportunity to reconfigure human cultures for the ecological regeneration, social justice and the re-emergence of community needed to carry us cheerfully forward into the post-capitalist, post-oil, eco-social future. Read Naomi Klein's 2012 book –This Changes Everything[93]—for a detailed discussion of this notion of shock as a positive change vector for our current culture.

It is likely to be a very bumpy ride and yet, holding and recovering, holding and recovering, again and again, a positive, constructive, action-oriented viewpoint is the most intelligent surthrival (survival/thrive) strategy.

Our brilliant and courageous decision, to work from a place of acceptance (the system is crashing and here is what I can do towards assisting to make the descent and subsequent renewal an intelligent one) is, in itself, a major contradiction to the other common responses to chaotic contexts that include, according to Elizabeth Kubler-Ross:[94]

[93] https://thischangeseverything.org/book/
[94] https://en.wikipedia.org/wiki/Kübler-Ross_model

- Outright **denial** (it is not happening, everything is fine),

- **Anger** towards self and the blaming of others (it's all my fault or the fault of the 1%, the bankers, the workers, the left-wingers…),

- **Bargaining** (if I do all I can to keep the system going maybe it won't collapse, and everything will be alright…) and

- Paralysis through **depression** (I feel so bad I can't do anything, pass the bottle, smokes, and drugs please)…

Contradiction

Reaching into and maintaining this **contradictory** hopefulness is, as we say, a process!

It takes persistence, knowledgeable use of a wide range of techniques and unwavering confidence in the human capacity to find constructive activism in the midst of adversity.

In this element, we will be introducing a process tool (Re-evaluation Counseling[95]) that many of us in Gaia U use to help with this. We also note that this tool needs a bundle of other tools to go with it (like permaculture design, nature awareness, systems thinking and intervention abilities…) and, especially, a capacity to **manage our time and promises** against overwhelm and discouragement.

We also need to balance our project portfolio to make sure it includes adequate attention to close relationships, raising children where appropriate, living well in community, making a living, running our households, gardening and **getting plenty of rest**.

This last one, plenty of rest, we hope will make you laugh (it does that for us!).

Why?

Because it is another, frequently necessary, contradiction to the desperation/isolation we sometimes feel as world-changers. As the

[95] https://www.rc.org

situation is so urgent, and we are the only ones that can see this; we can't rest until we have fixed it all up (ha, ha!!!). What the world really needs is for us/you to be well-rested, much-loved, fully-supported, well-fed, well-organized, well-exercised and well-able to collaborate with other people.

Contradictions, oppressions...

This quote nicely encapsulates the idea of contradictions:

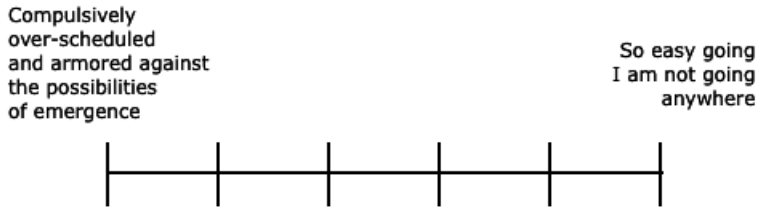
It is important to do what you don't know how to do.
It is important to see your skills as keeping you
from learning what is deepest and most mysterious.
If you know how to focus, unfocus.
If your tendency is to make sense out of chaos, start chaos.

Carlos Castaneda

The insight here is that contradictions are somewhat universal (they appear in shamanic worlds as well as post-positivist scientific worlds), and they are also individual. Individual means, for example, over-focused folk allowing some unfocus in their lives and under-focused folk learning how to focus.

This is entirely true around time management and the management of promises. As individuals, we can imagine ourselves arranged along a continuum that has something like 'I am compulsively over-scheduled and armored against the possibilities of losing control and experiencing emergence' at one end and 'I am so easy-going that I'm not going anywhere' at the other.

Put yourself on the line!



What this means is that we need to balance between doing what we don't know with doing some of what we do know. Where that balance lies will be different for each of us.

A second inference is that, since we'll be doing things we don't know how to do at least some of the time, we will need to tolerate and work through some hard stuff. We'll not be able to add to our skill-flex without effort, patience, and persistence. Please, therefore, be prepared to experiment enough with suggestions and proposals to get past initial resistances.

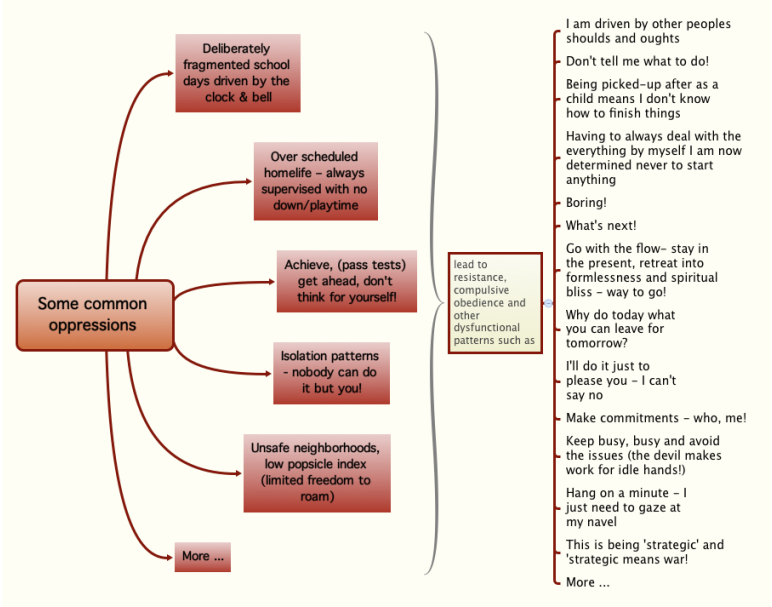
Culture and Community.

Inside our cultures and communities, there are rafts of thought-patterns (memes) which we 'catch' as we develop through our lifetimes. Not all of these are intelligent. Many of them are installed as the result of stressful conditioning (oppressions), and these patterns can seriously disrupt our ability to access our flexible, unbounded intelligences.

Conventional schooling, in which some of us spend half our young lives, may subject us to arbitrary and painful discipline whilst we are being indoctrinated with deliberately fragmented, sometimes irrelevant and frequently irrational 'learning.'

Schooling is a common source of dysfunctional memes (those that give rise to rigid and prejudiced thinking). These may seem indelible and, as they are shared across our culture (normalized) seem, well, normal.

The XM*nd Map below shows some common oppressions and an informal list of dysfunctional memes that might arise as a result. Dysfunctional memes, by the way, are called 'patterns' in the language of re-evaluation counseling. Please do go to the editable version*[96] *of the XM*nd Map and add to this list. This way you can also see the comments below the map that only show up online (feel free to add your own).



[96] http://www.xmind.net/m/tNJ8/

Two Routes to Success around Managing Time, Managing Promises

The two routes to success

There are two core and connected routes for improving our capacity to Manage Time and Manage Promises.

One is the **cognitive** route that has to do with learning new tools and new attitudes.

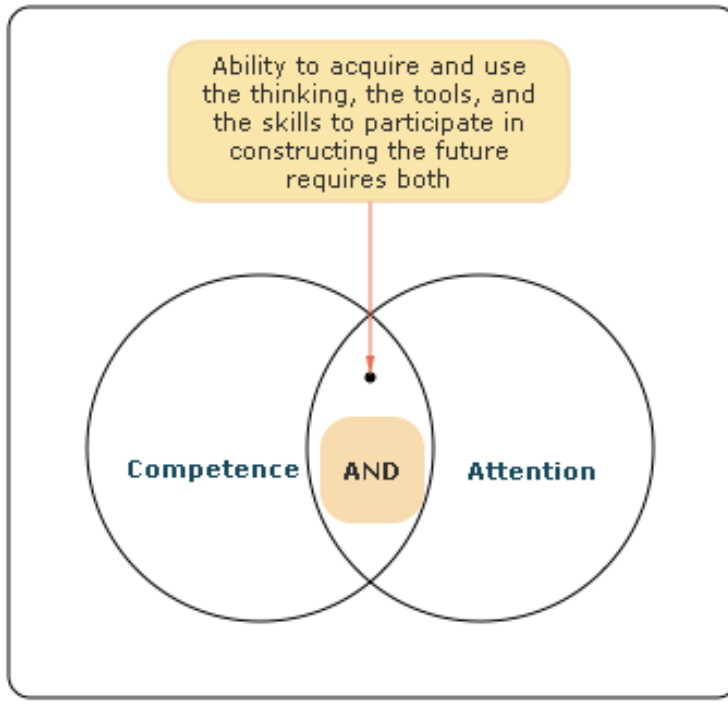
The other is an **affective** route (affects = feelings) that involves **unlearning or releasing** any dysfunctional patterns that rob us of our ability to think well and flexibly.

We sometimes summarize these two overlapping routes or conditions as **Competence** and **Attention**.

- **Competence** is to do with the ability to acquire and use knowledge and skills

- **Attention** is to do with having the emotional calm to be able to put your mind to the task on hand (to be in the present).

Both are required in order to be effective.



In this book, we present ideas for working on both the cognitive aspects and the affective aspects of managing time and promises. On the cognitive side, we offer tools with which to experiment. On the affective side, we offer attitudes to cultivate whilst also inviting you to notice any 'patterns' you might have that generate emotional 'noise' around the topic.

For many of us being consistently cheerful and relaxed about being accountable, balanced, strategic, efficient and committed whilst also being in our integrity around time and promises seems to need attention to both aspects.

Otherwise unwanted emotional noise can easily drown out our intelligent minds and render us incapable of organizing much at all. Using the language of Re-evaluation Counseling we'd say that

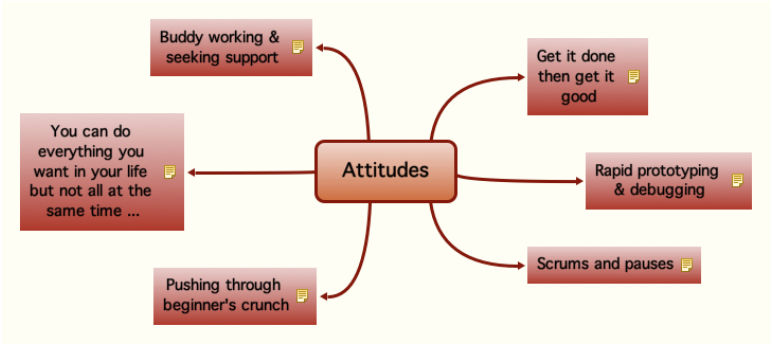
the topic (Managing Time, Managing Promises) can **re-stimulate** (trigger) **hidden** (and usually old) **patterns** that then play very loudly and take over our capacity to think well.

Please be alert to possible re-stimulation around this topic. It turns up as resistance, rejection, an unwillingness to experiment, feelings of exhaustion, boredom, despair, self-loathing and other ways of feeling bad about ourselves, compulsive distraction and a hundred other ways of filling our minds with anything but what we need to think about.

A primer on how to deal with restimulation is included in this chapter. With that in mind, please have a look at the following collection of key attitudes and tools in the next sections of the chapter.

Attitudes to cultivate - 1

Please click on this link[97] to go to the original of the map below and then you can edit the map for your own purposes. The notes on the map are reproduced on this page.



[97] http://www.xmind.net/m/9Su8/

Get it done then get it good

This is an approach that might once have been called 'quick and dirty' and which proposes that it can be really effective to create a fast, informal and more or less complete version of something and then go back and 'edit it' for better quality later (after some reflection).

This way we avoid getting blocked by perfectionism (e.g., laboring to get that first sentence exactly right and not being able to proceed until that's done). Also, we are much more free to throw out whole chunks and ideas that didn't really work as the relative investment is light enough for this not to be a big sacrifice.

XM*nd mapping helps a great deal with this.

"Perfection is the enemy of the good"

Rapid prototyping & debugging

As we are working in the digital world, we can make good use of the learnings of agile programmers. They like to test a concept design out by working through a whole approach once or twice in a crude way. They like to expend as little effort as possible in the detail until they are more or less certain that the overall approach will work.

So, for example, we might try creating a deliberately rough and ready Output Packet (OP) at the beginning of the OP cycle using *lorem ipsum* text and a single placeholder image just to see how the whole things works. This way we will understand it enough to be confident that the technicals will not get in the way when we come to do the real thing.

Ask yourself at the beginning of every project: where are the rapid prototype opportunities here?

This is, we find, one of the strategies with the most leverage and, of course, you get to iron out a bunch of bugs before going public (very good for your credibility in some circles)

Attitudes to cultivate - 2

Scrums and pauses

A new understanding has recently emerged: people do their best when they have periods of intense and focused project work (the scrum) followed by periods of relative calm when they attend to mostly what shows up, and to resting. (Scrum is a word taken from Rugby Football, English style, that involves the two packs of eight opposing forwards engaging in an intense shoving effort to win the ball…crazy huh!).

Thus a small team might organize a three day, 12 hour-a-day work-in (away from distractions and with full-service support) to move a project forward (e.g., to do a permaculture design) and then work gently over the next two, four or six weeks to get the drawings done before meeting up for another super-productive scrum-down to prepare the presentation for the client.

We write these eLearning elements this way. Andrew prepares outlines, consults with colleagues in a normal bit-by-bit way, then asks Liora to give him two or three days of heightened support (think and listens, get the meals, deal with inquiries coming in, read drafts…) so we can scrum-down and write the modules. It is very effective.

And here's a little story about this. Andrew once worked 15 hectares (40 acres) of rolling chalk-lands for five years (grazing sheep, planting trees for wildlife hedgerows and future coppicing, cutting firewood and so on) with mostly a self-powered handcart as farm transport. He soon discovered that climbing slopes pulling the cart was much better on routes that involved short, intense climbs (the scrum) followed by a longer "resting" section on the contour, then another, short but steep climb (another scrum) and so on. Long, steady, uphill climbs were much less possible. Older farmers call this type of road, a 'donkey road.'

It's the same pattern. Short periods of intense effort followed by

long, restful recovery periods work better than climbing all the time… try it!

Buddy working & seeking support

Gaia U pioneer Associates Ethan Roland and Patrick Gibbs lived close by to each other for a time. They found that just by being in the same space whilst working on their own Output Packets was very helpful. At any time one of them could notice if they were getting stuck, feeling isolated, had a particularly complex piece of thinking that they wanted to speak out before writing it up…and ask for a think and listen there and then (the other could say 'yes' or 'how about in five minutes' or some such easy negotiation).

This was so effective that when Patrick moved to another location and home visits were just not possible they would both get on Skype together and, after checking-in, go about their own work again with the Skype connection live until one or the other requested a think and listen, just as they had done in their face-to-face situation. This worked well too, and the concept of working solo but with a buddy in the background is now part of the Gaia U lexicon.

So, combat that deadly isolation and tune into buddy working and the possibility of asking for and getting support NOW!

Attitudes to cultivate - 3

You can do everything you want in life but not all at the same time.

This is a potent quote from Liora. It means that you can afford to leave some projects for later when you have the time and resources to hand.

Pushing through beginner's crunch

Learning how to do something new requires traveling along a learning curve that might be quite steep. The learning process often needs a scrum-like effort (followed by some on-contour recovery) before you get to a place where there are any observable benefits. The physical training maxim, 'No gain without pain' comes to mind which contradicts the possible addiction to ease and grace[98] that sometimes emerges in our world. Developing a capacity to know when to persevere and when to let go is also a worthwhile goal.

This is another opportunity to reflect on your personal approach.

Question: are you a person who is easily disappointed and gives up without a second try or are you at the other end of the continuum where it is difficult for you to let go of something that's not working?

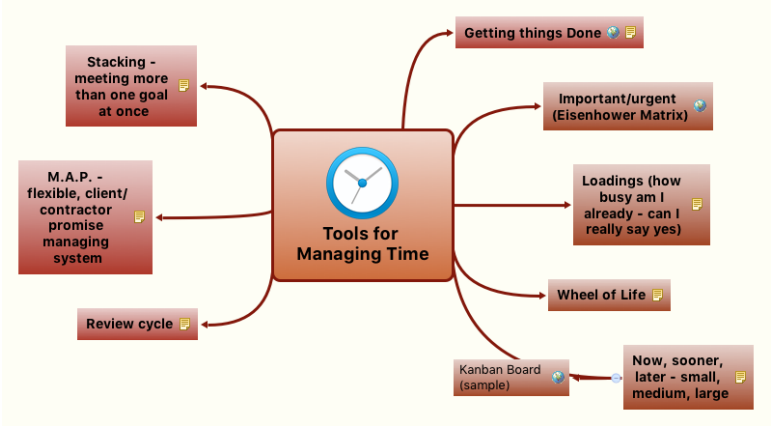
Experiment with approaches that are **contradictory** to your normal approach.

Tools of value-1

Here is the link[99] to the XM*nd Map below. Click on it to go to the original and download it to your desktop for reference and editing. You need to do this to see the notes. These contain valuable extra details.

[98]Having things happen with ease and grace is a worthwhile goal and yet giving up when something feels hard to do can also be a dysfunctional pattern. Maybe we should be invoking 'ease and grace with grit.'

[99]http://www.xmind.net/m/YxCi



Getting things done (link to GTD)

The keys to GTD (as it is commonly known) are to:

1. Set up an entirely reliable system that gets your agendas out of your head

and

2. Pay regular attention to maintaining it.
   Andrew writes, *"An exact rendering of GTD does not suit me and herein lies a critical point – experiment with and explore systems to extract the key concepts and adapt them your style and needs..."*

From this, we learn to create a time management system that works for us as individuals. That is, design for the client = you.

Loadings (how busy am I already – can I really say yes?)

The concept is simple. And yet used so rarely!

We have so many hours/days/weeks/years to play with. We already have commitments to work, to essential periods of rest and recreation. Additionally, we need time to respond to likely contingencies.

What's left over? Or we might even ask: by how much are we already overcommitted?

We need to make some estimates and use these to work out if we have any slack before taking on anything else. We could use the Small, Medium and Large tool in conjunction with the Wheel of Life tool (see below) to make up a chart that shows how we allocate our time over our range of commitments.

If we are considering adding activities (like doing a Gaia U course – a Medium, maybe Large job at 8 to 12 hours a week) then we will have to eliminate existing activities from our agendas, get help, increase our pace, design less labor-intensive methods, get up earlier, make one job yield outputs for two and so on…

Tools of value-2

Important/urgent (Eisenhower Matrix)[100]

[100] https://en.wikipedia.org/wiki/Time_management#The_Eisenhower_Method



Wheel of Life

1. List all aspects of your life that you would like to pay attention to.

These may include (feel free to make your own list):

- Making a living
- Personal self-care and development
- Relationship care and development
- Parenting, being an aunty, a grandad…
- Community care and development
- Home and garden care and development

- Reading, studying, writing, networking
- Dreaming and designing

2. Draw shapes (circles, blobs) on a piece of paper that have a size that corresponds to the relative amount of attention you currently give to each of these.

So, for example, if you spend only a small amount of time on gardening, make a small circle for that and, if you work at a job (or maybe two) all hours make a very big circle for 'making a living.' Adjust until it feels right.

3. Then make another blob diagram that shows how you would like the situation to be in the future. So, for example, if you would like to be gardening all day give that a big blob and, if you want to shorten your work week drastically, give that a small blob. Adjust until it feels right.
4. Notice the differences. The first is 'a realistic appraisal of the current situation' the second is your 'long-term vision and goals.'

Can you think of some next achievable steps towards the vision? See if you can add these to your ePortfolio under Content/Plans.

Now, Sooner, Later – small, medium, large

We have already met Now, Sooner and Later. This simple system of allocating priority is very user-friendly, quick to use and flexible. Therefore it is a hundred times more useful than classic, engineering style systems that require accurate knowledge of the duration of a project or part of a project.

Now you can add Small, Medium and Large to the mix in order to estimate the scale of the job. This is flexible too — for example, a project that has work content estimated as less than a day's work

= Small. A project that is estimated at least a day but less than two is a Medium project, and one that extends into a week or more is Large.

Or, in another example, small might be less than a month, large more than a year, and everything else is medium.

You get to choose your timescales.

Estimating is a matter of experience of recording the actual time a project took against the time you estimated originally. Make a note of why there is a variance (if there is) and ask more experienced people to help you estimate. All good estimators add safety margins to their figures. The less experience you have, the bigger the margins.

Jennifer English multiplies her first estimates by three.

A technique, called Analytical Estimating, proposes that you can divide any project up into smallish elements (probably hours, not days) and then estimate each of these. You will surely under and over-estimate. The idea is that the unders and overs balance out if you use enough smallish elements.

Developing good estimating skills is valuable for anyone and essential for people who earn by contracting.

Using a free account on an online time tracking system like Harvest (https://www.getharvest.com/)[101] is also very useful.

Tools of value-3

Stacking – meeting more than one goal at once

Stacking is a permaculture design concept. It proposes that we can design our activities and projects so that an action meets needs in more than one project.

[101] https://www.getharvest.com

A classic example is harvesting pick and pluck salads. By picking we create space for more leaves to grow into so that harvesting increases yields. Another example is of knocking acorns (slightly under-ripe) out of oak trees with long sticks. We harvest the acorns AND knock dead material out of the tree, and that increases the yields the next year.

In Gaia U terms we can imagine that generating OPs will provide you with lots of content for making a website advertising your business (or feed a blog that enhances your reputation). Vice-versa, we can use the making of a website as an example of a design project and use the website itself as part of an OP.

Or the project we document for an OP might be an earning project and the manual we write for the client to interpret their design might be an artifact in an OP.

Or an associate who is practiced at making OPs might contract to assist an elder newbie to do theirs. The resultant OP gets used twice – once by the elder newbie as evidence of their lifetime of un/learning and again by the ghostwriter who folds it into an OP about the power of acknowledging a significant elder and bringing them into the public realm. This also obviates the need for the elder to acquire digital literacy (which might just be a step too far. We have a few of those in the background if anyone is ready to be a good ghost-writer).

Your creativity in this respect is welcomed…

M.A.P. – flexible, client/contractor promise managing system

It is about **making promises and subsequently managing these** to maintain credibility with our clients.

The understanding is that a client can cope with/adjust to late delivery much better when they know it will be late (with as much notice as possible). Late delivery without notice is much harder to

deal with and can wreck reputations and terminate contracts.

A good promise has the following elements:

A clear articulation of the promise such that you and your client can understand it based on what he/she/they and you care about.

A time/date by which the promise will be fulfilled. Be realistic here; it serves no one for you to promise something you will not be able to fulfill. This promise is designed so you can manage your actions.

Who your client is (this is not always clear especially when there might be several stakeholders involved).

A condition of satisfaction. This gives the guidelines for both you and your customer as to when your promise has been fulfilled.

and, at regular meetings with the client, we manage the promises by:

Assessing (during periodic reflection, e.g. before a meeting with a client) whether or not:

a. all promises will be fulfilled satisfactorily on time
   or
b. there are breakdowns with some promises, but you are taking actions to manage them and assess that the promises will still be fulfilled
   or
c. there are breakdowns jeopardizing a promise, e.g., the date, and you need help if the original promise is to be recovered
   or
d. you need to renegotiate the promise.

It is straightforward in concept, and yet very few contractors use anything as systematic and radical as this.

It makes a big difference for relatively little effort. A properly negotiated late delivery (rather than a no-delivery without advance notice) can actually enhance our reputations rather than damage them.

Tools of value-4

A sample review cycle (please design your own)

Jennifer English of Gaia U (a master time and promise manager) writes:

*I like to review my jobs lists and priorities using the following pattern.

15-30 minutes daily <I like 15 minutes before and 15 minutes at the end of the day>,
60 minutes weekly,
3-6 hrs. monthly, 1-2 days quarterly,
3-7 days annually,
1-4 weeks every 3-5 years.
I schedule the review times well ahead to ensure I leave the space to do them.

At each review, I ask - "what's alive for me for the next working period and what's essential"? This way I balance working with my creative energies as well as holding to my promises.*

Dealing with Restimulation: A primer

Restimulation

Noticing restimulation (also know as triggering)

Noticing our own restimulation[102] (when our dysfunctional patterns rise up and take over our intelligence) takes practice. We might begin to recognize when our thinking has slowed down or,

[102]Other people can provide valuable feedback because they can often see clearly that we are not functioning so well. We might be so used to it ourselves that we hardly notice.

even, stopped altogether, and we are in flight, fight or shutdown mode. A key factor in allowing us to notice our restimulation is that we have successful strategies[103] for dealing with it.

This is an important point. It is hard for us to acknowledge problems, any problems, if we don't know solutions are possible. Just identifying a problem without any constructive idea of what we can do about it may just push us into hopelessness, and none of us like to go there.

This is true for problems like soil erosion, for example. If we don't know that soil-building is a possibility and that we can do this on a large scale with relative ease, we might prefer to ignore the issue.

The argument here is that denial is sometimes/often a function of not knowing that there is something effective that we can do about the situation.

Knowing that we can deal with restimulation allows us to notice it in the first place.

Remember that the topic is Managing Time, Managing Promises. In the Gaia U context, we can allow ourselves to notice how the Gaia U approach offers unusual flexibility. We are likely to need to remind ourselves about this as the normal patterns of hard deadlines, solo working and more are deeply embedded in our psyches and will seek to reassert themselves. This reassertion effect means that we might forget that we are in a different culture and still act as if we are in the old one.

Question: What would it be like to negotiate Gaia U-like flexibility into more aspects of life…?

[103] Booking a think and listen as soon as we notice our thinking turning off is a robust strategy. During the think and listen we can focus on bringing our minds back into function.

Contradictions

What are the contradictions?

The flexibility designed into the systems

1. We have full permission and are encouraged to renegotiate our promises around the delivery of OP's so that we can accommodate contingencies that emerge in our lives. There is an OP Bus on the first of each month, and we can choose to catch a ride on any of these. There is **no pressure** to catch a specific bus except that sometimes an OP Bus has a special focus like Life and Career Reviews (LCR's) in which case you might get a better service by being on one of these with your LCR.

A little note here – during the online orientation the nature of this flexibility is different. For example, whilst we have the flexibility to do the readings anytime we like from delivery day onwards we have promised (by default) to have done them by the next webinar day and be ready for discussion and questions.

2. We are invited to configure our Gaia U project work so that it overlaps with other projects that are on our life's agenda. So, if we are focused on making a living right now, for example, we can make our project for Gaia U – 'Making a Living.'
3. We can switch focus, more or less at will, to deal with changes in our circumstances as they arise. Whilst we might start out engaged in Project X, we are free to switch to Project Y when it shows up, IF we want to.

Support...

4. We are encouraged to make use of buddies, advisors and skill-flex advisors more or less on demand.

5. Likewise, we are encouraged to seek out and train up support people close to home for even better access.

Liberating structures

6. We have learned simple yet effective methods (Think and Listens is an example) that work very well in both circumstances 4 and 5 above to make sure that we get uninterrupted thinking time that allows us to process our (possibly chaotic) thoughts and feelings.

It's good, no?

Very good!

We can notice how smart we are to have chosen to join such a generous community of bold and flexible world-changers who know that good support is vital to our well-being and success. Our engaged participation in this community, asking for support and offering support, ensures that it thrives and that, therefore, it is increasingly available to the coming generations of world-changers like us.

How cool is that? That actively seeking the support we need for ourselves (to be effective and powerful) is building a long-term world-changer support network for the future? And all it takes is for us to use what's there.

Reaching out for Support

What we know about isolation and asking for support

One major dysfunctional pattern that everybody has in spades (spades = has a lot of) is isolation. It is so easily restimulated that we hardly notice that we are struggling to ask for support or that we are somehow reluctant to be visible.

Maybe, for example, we have been conditioned to think that asking for support is a sign of weakness that will expose us to ridicule and/or, especially in the context of 'school,' accusations of cheating and so we'll get into trouble. Maybe we think that being visible is 'being a nuisance' or somehow being immodest.

Just do it!

So, we have to make an effort to break through these oppressive (and probably hidden) ways of thinking. This may mean, for example, just calling-up a support person, a buddy, on the spur of the moment, EVEN IF WE DON'T HAVE ANY IDEA WHY!

All we'd need to say is 'Would you like to swap five minutes Think and Listen time' and if they say yes, we can start our time with no idea what we want to talk about. We can even say that out loud. The key thing is that we initiated the request.

Next time it will be easier. Soon, with a little practice, we will know just how to use such valuable pieces of time.

Do it now!

Who can you call now, email now, visit now, to set up a think and listen? If there is no-one on your support list that you can call now, make re-building that list a priority.

Activate that support network!

Scholar skills one-ArCEA-Active Reading

Skim it, scan it first

In the first place, for **active reading**[104] it helps to skim a book or paper and come to a decision as to whether or not to spend significant time on the piece. That is, a discerning reader surveys the content before investing. It's a type of due diligence.

They will scan the table of contents, TOC, and maybe the index, if there is one, for keywords and concepts. They are looking to see if they can detect biases or worldviews, underlying the material and what yields might arise from a more thorough reading. **You can do this**, **too**.

Deciding NOT to read a piece (perhaps because of the inappropriate worldview of the author[105]) is a legitimate choice for you to make. You cannot read everything so remember to make choices. Making mistakes is fine, and you can trust that material that is worth reading always turns up more than once, so the decision is not final.

Secondly, once you decide to proceed, treat the piece as a buffet meal. **Cruise** it first **and choose** what you want to take from it (including trying things you have not tried before and that you don't recognize. Feel free to ask someone.) Then make up your plate according to your appetite: not too much, not too little and remember that you can always come back for seconds and thirds.

Scan tables of contents to see where to go to find sample snippets

[104]The essentials of **active reading** can also be applied to watching **videos**, listening to **podcasts**, attending **lectures and talks**, having **conversations** with knowledgeable friends, colleagues and more.

[105]Unless you are specifically seeking to get to grips with a way of thinking that is alien to you, be ready to strengthen your own arguments as to why you think differently. An example might be reading work on soil fertility that assumes that soil science is chemistry (most literature does) whereas you know it to be about biology. To understand how the chemistry model came to dominate the argument up until now, you want to know it's history.

that interest you. Read these, check some references to discern if the material presented is in a form you can handle. Many textbooks use language that's too dense and too specialized for the general reader. Ask yourself if reading this is time well spent.

Choose to **read it or reject it or save it** for a less busy time.

Note that being picky is much harder with video and audio material. That's why many folks prefer written material for learning. You have much more control over what passes before your eyes and ears.

Reading for information is a **harvesting and thinking** process. This little book is intended to help you get more skilled at that.

The proposal is that you, the learner/unlearner **become skilled at harvesting information and critiquing it**, whatever the medium or source by developing a lifelong skill using ArCeA.

Text marking

Text marking means all those 'forbidden' activities around reading books such as:

- folding down corners of pages,
- underlining key words and phrases,
- drawing lines down the sides of important paragraphs and
- writing your own notes and observations in the margins.

Well, here's the latest thinking:

These 'bad behaviors'[106] considerably **increase** our ability to harvest the good thinking the author has put into the material AND allow us to start the process of making good meaning for ourselves **by relating the material to our own thinking**.

And making meaning is essential to building our intelligences.

[106]'bad' having been instilled in many of us on the basis that books were rare and precious (as they were in the post-WWII austerity years in Europe and for public schools working on slim budgets).

Skilled readers for information have well-developed systems for text marking[107] and the next pages illustrate some of these.

Text marking: Turning down/up corners

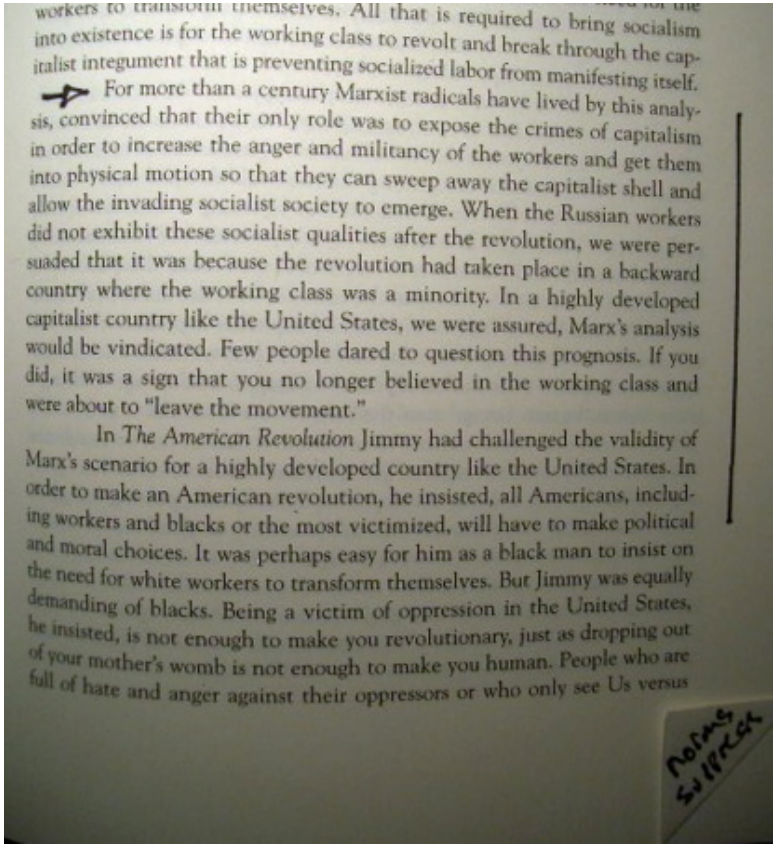
A skilled reader for information will turn down/up corners of pages. More than this, they will write a couple of keywords (tags) on the turn down (also known as a dog-ear), pointing to the significant text they have highlighted on the page and summarizing its meaning.

They finesse dog-earing by:

- folding a corner to point to the page before or the page after and
- folding down a top corner to point at the top half of the page or folding up a bottom corner to point at the bottom half of a page

See example below in which a combination of corner turning and paragraph marking make it completely clear what part of the writing struck the reader as significant. Finding this quote again (to use in an essay or discussion) and understanding why it was highlighted will be relatively easy:

[107]These digital days it is quite likely that we'll be interfacing with PDFs or other digital forms of text. Text marking is entirely possible in these and is called 'annotation.' Search the web using 'annotate pdf freeware' to find a system that will work for you and note that some operating systems come with built-in pdf readers that can do annotations (for example, Mac OSX pdf reader 'Preview').



workers to transform themselves. All that is required to bring socialism into existence is for the working class to revolt and break through the capitalist integument that is preventing socialized labor from manifesting itself.

For more than a century Marxist radicals have lived by this analysis, convinced that their only role was to expose the crimes of capitalism in order to increase the anger and militancy of the workers and get them into physical motion so that they can sweep away the capitalist shell and allow the invading socialist society to emerge. When the Russian workers did not exhibit these socialist qualities after the revolution, we were persuaded that it was because the revolution had taken place in a backward country where the working class was a minority. In a highly developed capitalist country like the United States, we were assured, Marx's analysis would be vindicated. Few people dared to question this prognosis. If you did, it was a sign that you no longer believed in the working class and were about to "leave the movement."

In *The American Revolution* Jimmy had challenged the validity of Marx's scenario for a highly developed country like the United States. In order to make an American revolution, he insisted, all Americans, including workers and blacks or the most victimized, will have to make political and moral choices. It was perhaps easy for him as a black man to insist on the need for white workers to transform themselves. But Jimmy was equally demanding of blacks. Being a victim of oppression in the United States, he insisted, is not enough to make you revolutionary, just as dropping out of your mother's womb is not enough to make you human. People who are full of hate and anger against their oppressors or who only see Us versus

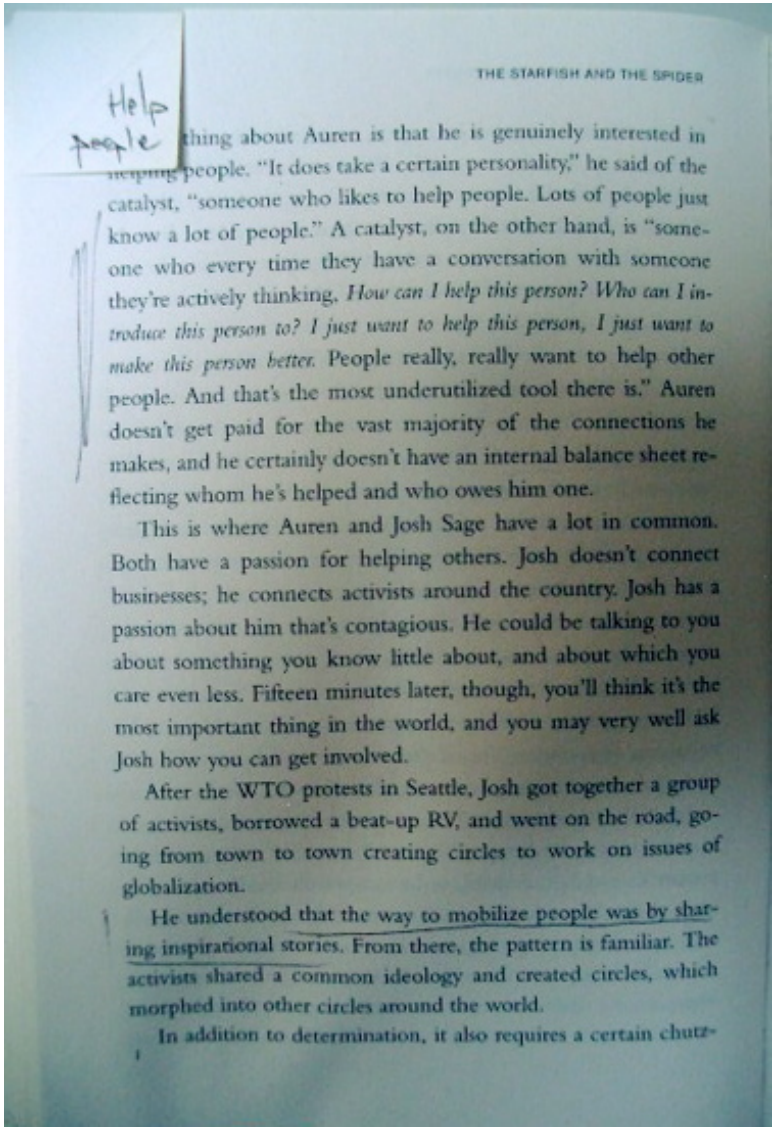
From - *Living for Change, an autobiography.* 1998, Grace Lee Boggs, University of Minnesota Press, Minneapolis, USA

Text marking: Underlining

Another example of text marking (thanks to Ethan Roland for supplying the sample from *The Starship and the Spider,* by Ori Brafman and Rod. A Beckstrom, Portfolio (an imprint of Penguin Books), New York, 2006).

This includes underlining some text, side-marking a paragraph and

turning down a corner, and making a note on the dog-ear. Good job, Ethan!



Text marking: Counting for Accountability

Use this underlining strategy anytime an author uses a phrase like "there are six reasons why the culture collapsed."

This type of phrase, that promises a certain number of identifiable clauses, is an alert for you to immediately search forward to make sure that all six are clearly indicated.

You will be surprised how often they are not and how much inferring you have to do to decide which points are the six points in question.

Looking ahead and underlining the beginning words of the sentence that introduces each point which might, if you are lucky, include 'firstly, secondly, in the third instance, fourthly' and other such useful point indicators is a very useful practice in understanding the structure of the writing.

You also get to discover that editing is quite variable and that, just because the material is written by a supposedly smart person, it does not always make sense.

Text Marking: Patterns of First and Last

Writers often work to a fractal pattern of 'first and last.'

The first sentence of a paragraph outlines the remainder of the content of the same paragraph, and the last sentence summarizes the paragraph.

Try underlining the first and last sentences of the paragraphs in a chapter of a book you are interested in before you have read it, then read your underlinings to see if they make sense. Anytime you are mystified, delve into the full content of the paragraph for additional meaning. Otherwise, read only the marked sentences.

Writers sometimes also use the same strategy with chapters. They use paragraphs in a chapter so that the first paragraph introduces

and outlines the topic; the last paragraph summarizes the content of the chapter and all the intervening paragraphs fill in the detail.

Try making sidebars down the margins of the first and last paragraphs of a chapter, read only those and see if you can glean the essence of the chapter without needing to read it all.

You can also see if the introduction of a book, the first chapter, and the concluding final chapter work to give you a good take on the bulk of the contents.

These **first and last** strategies can help you move through a lot of material fast. The idea is to preview material and only choose to read what you need to.

Text Reconstruction

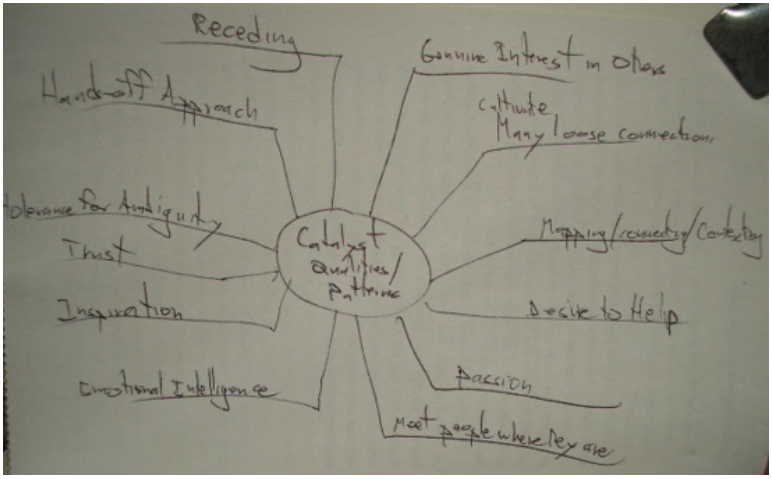
Now comes the time to actively reconstruct the text, as if you were explaining what you have just read to another person.

Indeed, verbally explaining what you understand from reading a section to another person is a great, informal way to reconstruct the text. Try using a five minutes each way think and listen for this purpose. This way you get to hear what your partner makes of the same or another piece).

Additionally, it helps to have made (by actively using your mind/hands/body) a physical record of keywords and phrases and maybe a diagram or two. **XM*ndmaps** are a great help here and becoming familiar with how to do these is a big advantage (see next pages).

(The asterisk in M*nd Map avoids any trademark issues as with the i, M*nd Map is a trademarked term).

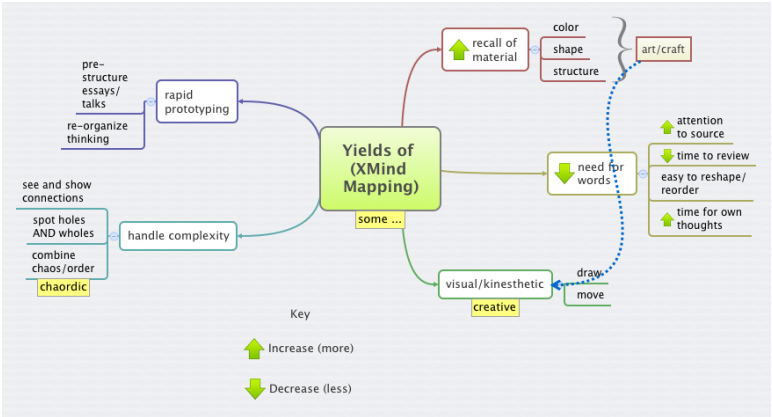
Here's an example also from Ethan Roland who made the handwritten diagram below. Once more the book is *The Starship and the Spider*. Note that it is quick and effective.



Text Reconstruction: Making XM*nd Maps

If you don't know much about M*nd mapping, we recommend that you spend some time learning how to do it using both hand-drawn and XMind versions.

M*nd Mapping is a powerful, game-changing method of note-taking and documentation that has at least the following characteristics:



Click here for Original.[108]

Note that one person's XMind is often another person's mess! You will follow your own much better that you follow those of others.

There are some fabulous web-based resources for learning how to make m*nd maps. Search (use DuckDuckGo) for some resources yourself.

XMind[109] has become the favorite bubble (m*nd) mapping software for Gaia U. It is open source and free (there is also a paid-for pro version with extra bells and whistles). The free version is highly recommended. Download it today!

There are other digital options for making maps. Yet, the advantage of using a common system inside Gaia U brings many benefits.

Remember though – you can make these maps by hand with pencils and crayons on paper too! This is often the best way to learn how to do them and also a great way to draft out the first version before using the XMind program.

[108] http://www.xmind.net/m/NuGk/
[109] http://www.xmind.net/download

Learning new stuff

It is well worth noting that learning new techniques always absorbs time in its own right. Frequently our early attempts to use them feel clumsy and possibly ineffective. It takes practice to get fluent. A measure of persistence is required.

All the techniques described here, text marking, text reconstruction, m*nd-mapping, and reviewing have doubled or trebled productivity (including the capacity for recall and for dealing with complex material) for many learners compared to the more usual non-systematic approaches we grow up with. Give new methods a **fair trial (10 goes)** before discarding them.

Scholar skills two-Resilient documentation

Resilient Documentation

What is resilient documentation and why do we need it?

It is easy in this digital age to imagine that whatever you author (write or compile) will now be easily saved and retrieved at any time in the future.

Not so!

The systems drift problem

The operating systems you use (Windows, Mac OS, Linux, Solari…), the authoring software (MS Word, Pages) and the media (remember 5-1/4 inch floppy disks, anybody?) are bound to change over time and not every change will be backward compatible. That

is, the technology of today may not work with the technology of yesterday, nor will you necessarily have the functioning hardware and cables necessary to run obsolete storage devices (like floppy disks) on your new machine.

Many folk are, for example, right now struggling with compatibility issues between early version Microsoft Office files (.doc, .xls, .ppt and so on) and the latest version MS.Office files labeled .docx, xlsx, .pptx and so on.

And that's just between versions of the same, proprietary brand of software. Add in media changes and OS (operating systems) modifications, and you can see that maintaining long-term access to your work will become an issue.

Generating and publishing editions

A second issue is that, over time, you will likely want to reform, re-use, re-purpose, edit and mash-up your material at will. Your ways of thinking will change; your insights will develop; and you may want to broadcast or narrowcast these changes by producing new editions of your material and publishing them via blogs, Facebook pages, Wikipedia articles, forums, or papers you can email in the form of formatted .pdfs, websites and more.

If your materials are only available as, for example, fully formatted and illustrated Word* (97) documents, it is hard to extract bits and re-purpose them. It is much better to have them in raw, simple, update-able formats so that you can draw on them at will and easily push them to any publishing platform.

Simple **formats include text as .txt**, **.rtf**, **.odt files** and **images** (resized for purpose) as **.png** files (more on images later).

- A special note about MS Word here. MSWord has been around a long time. It uses a non-standard form of markup language (which you hardly ever see) to format content. You may get to see it (as gobbledegook) when you cut and paste Word-generated content

into websites, forums and so on. It is sometimes hard to get rid of, and it can also break your site. Better not to use Word at all if you can break the habit.

Try Open Office (free and open source)[110] and/or Libre Office[111] (also FOSS = free and open source software).

Back-ups

Lastly **please keep backups of your work on a drive that is separate from your primary machine**–either an external hard drive or an online backup service or both! Free online back-up of small amounts of material can be managed through Dropbox, Google Drive and more. Investigate cloud services if necessary.

Please back up your work! Or, if you want, *you can ignore this request and wait until you lose the last six months of your work before you get the message. This happens often enough to cause considerable grief and hassle, which you can do without!*

Summary – resilient documentation is:

This combination of keeping your own originals in simple, forward-compatible formats (ones that are not proprietary, meaning not owned by one company), un-assembled (images and text separate) to allow maximum flexibility, and backed-up on external drives is called **resilient documentation**.

Please adopt these practices now!

How to use the sections in these courses

In the spirit of *active learning* the sections we provide for these courses are designed for self-foraging.

[110] http://www.openoffice.org
[111] http://www.libreoffice.org

Self-foraging means that you can follow your nose and sample those bits that most interest you first, take a snooze at any time to reflect on the material, follow up leads at will, come back to anything you are not clear on as many times as you like and otherwise remember that you are in charge of how to use your energies and intelligences.

In this section you will find the following pages:

- a summary mind-map made in XMind, that outlines the topic of resilient documentation
- tips for using the expanded XM*nd map that comes next*
- *the expanded XM*nd map which develops each arm of the topic more thoroughly

It is **essential** that you download the free version of the software, XMind[112], used to make these maps, onto your own computer. We will be using it a lot during the Orientation so learning how to use it now is important.

Having XMind installed enables you to download original XM*ndmaps, open them in your copy of XMind, edit them, print them, add your own notes and so on.

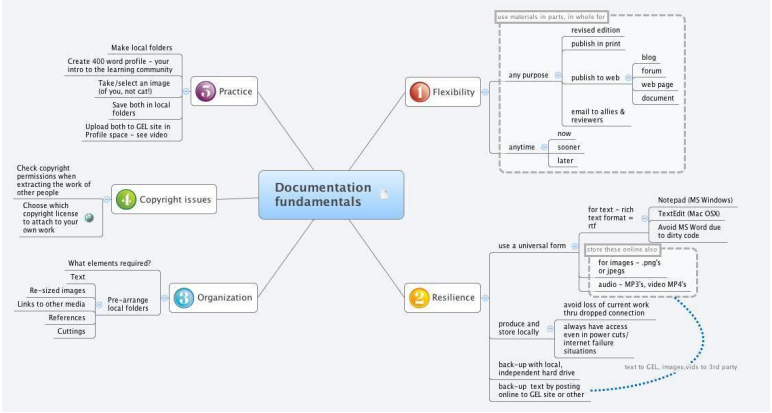
That's great for *active learning*!

We will touch on anything that is unclear to you in the webinar.

Extended Mindmap

Either view the XM*nd map below or (better option) click this link[113] to **go to original** on XMind server and download.

[112] http://www.xmind.net/download
[113] https://www.xmind.net/m/G7sp/



Scholar skills three-Scheduling study time

Ask yourself, "Do I have time for this?"

The Gaia U program design is flexible. It allows you complete freedom to determine your projects and the bulk of your curriculum as long as you apply **The Permaculture Ethics**:

- *Care of the Earth*
- *Care of People*

and

- *Fair Shares (also known as Limits to Population and Consumption)*

Once you enter the autonomous projects phase (after this 14-week Orientation) you will have the freedom to decide when to deliver your project reports (known as Output Packets) for peer and professional review.

These are two ENORMOUS flexibilities that most programs cannot accommodate.

However the Orientation phase, beginning now, is more structured and relies on regular online interaction over the full 14 weeks. You will need to be available, persistently on the case, and to have good access to a reliable internet connection whenever you need it.

Schedule the time

You need to **schedule the time for study** and, if necessary, push other things in your life to one side for the duration. Getting up extra early for study time is an option, as is working weekends and evenings.

You also need to develop a study pattern that fits the workload (8 to 12 hours a week in 90-minute sessions is ideal) AND your lifestyle.

Create spaces

You will also benefit from creating a study situation that inspires and supports you.

This might include:

- a well-lit reading space,
- a secluded set-up with your computer that is uncluttered and comfortable,
- a ready supply of drinking water to hand,
- baroque music playing in the background,
- candles flickering,
- plants in view
- an accessible view of nature,
- another willing person who will listen to you as you review the material out loud (make it reciprocal using think and listens),
- a whiteboard or similar on the wall to dash off quick maps of your latest thinking

a pace-around space,
- other features…

Treat yourself as a creative author. Remember that you are changing the world right now and this very activity justifies you in preparing your environment to support you in this bold work.

The results

As a result, you'll be on top of the materials and well-read **before the webinars**. This enables us to hold deeper conversations, gather insights and ask relevant questions when we are online together.

You will be more active in the forums and feedback zones and become a confident user of the Gaia U online ecology. Your contribution to the group will allow our learning community and our collective intelligence to grow.

We'll be delighted to have you on board.

What is there to do?

It will help you plan if you make a clear list of the steps you need to complete for each element of the online course.

Each element lasts two weeks and consists of **three phases**.

Phase 1. Reading (first week)

Reading and making sense of the materials. This essential activity can start as early as 9:00 am Pacific Time on the first day. Make sure you have made a start within 12 hours of that time.

First day:

Orientations that start in February or March (02 and 03 Orientations) start on **Tuesdays**

Orientations that start in September or October (09 and 10 Orientations) start on **Thursdays**

Phase 2. Webinar

Marks the transition from week 1 to week 2

The webinar is our main opportunity to talk as a group, and includes sharings, think and listens, and questions and answers. It is scheduled for the second Tuesday (02/03 Orientations) or second Thursday (09/10 Orientations) of the element.

Phase 3. Activities (second week)

Activities designed to assist you to anchor the un/learning – must be completed before the end of the Tuesday/Thursday at the end of week 2 – better still, get them done by the day before …

Summary:

Phase 1. Reading for information and making sense of the materials

Phase 2. The webinar–be prepared! You are expected to post any questions you might have on Slack.

Phase 3. Activities and assignments to assist you to anchor the un/learning

Goals, survey, analysis

Goal – responding well to the scale of the job

Plan for a **minimum** of **eight study hours per week**. You may have to work quite intensely during this time and/or leave out some of the **self-foraging** opportunities.

Twelve hours per week is even *better* and highly recommended. These extra hours will enhance your ability to apply the thinking in practice and navigate the Gaia U online ecology.

Of course, you will have **contingency weeks** when external events force you to miss your commitments. In these weeks, aim for a minimum of four study hours. And don't let these thin weeks happen more often than one in six.

If this is going to be tough for you, now is the time to butt out, take a rain check, retire from the fray.

You can come back for another orientation in six or twelve months' time. **There is no rush**.

1. Make a survey

In the activities section at the bottom of the course page, you can find a link to a very plain scheduling chart. It is in the form of a "Google Doc" spreadsheet. Using your free Google account, you can download a copy of the spreadsheet to your own computer.

Edit the spreadsheet at will; make it your own. Print a copy or maybe several.

Using hand tools (pencils, felt-tips …) and this spreadsheet, block out your existing commitments. Use different colors for different categories of time: family time, social time, making a living time, resting time, meal times, sleeping time, exercise time and so on.

Note: We are also interested in adapting Gaia U to suit you more. Let us know how we can do that, and we'll see what's possible.

2. Make an analysis

Next, fit in your study time. Can you find those 12 premium hours? Can you achieve an 8-hour average? What about getting on the case close to 9:00 am, PT, on the day we release the next element?

Is it a struggle to make the space? Will you be out in the remote back-country too often to connect to the internet enough (no less than three times a week)?

Does it make sense for you to join us now, or do you need to change your life patterns first to make the space?

Activities-Managing Time & Promises

Activity MTMP 1 — Add your XM*ndMap here

Make a first XMind from the content of this Module and then upload this XMind to the Xmind server and get the link to share.

Activity MTMP 2 - Do I have time for this program?

Scheduling study time (making sure you have the capacity to work through the Gaia U program) is an essential activity. Use this spreadsheet[114] to work on this critical process. Share your response to the question – "do I have time for this program"?

Activity MTMP 3 - Your past, present, and future stories go here

Activity 3 (choose this one or activity 4 below)

Describe your history and current story regarding Managing Time, Managing Promises. What has been working well? What would you like to do differently? Go further and let us know what methods, approaches or techniques you intend to gather into a rapid prototype opportunity in the near future and think about how you will determine if these are effective:

- ask what problems might they solve
- are they worth the effort and

[114] https://docs.google.com/spreadsheets/d/1HeyD77m3snpPYBIhibuBJzTK0hJnfbphQfPyDWwsaMM/edit

- do they contradict – in a helpful way – your usual patterns around managing time, managing promises?

Post your past, present and future stories as a comment in the course list.

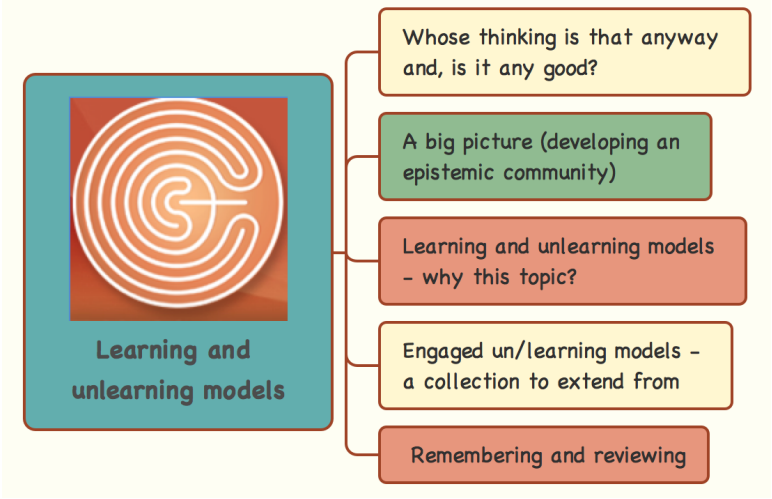
Activity MTMP 4 - Your records of think and listens go here

Getting stuck is the enemy of getting things done–calling for think and listens is one potent approach to getting unstuck. Arrange at least three think and listens and/or buddy-on-skype type working sessions. Have your buddies take notes when you speak, and you take notes for them when they speak. (Buddies can be Gaia U folk or local allies. You will need to train local allies in the think and listen method).

Activity MTMP 5 - Your reflections on working through this element....

As a last thing, write and share your reflections about this element as a comment below.

Chapter 4: Learning and Unlearning



Whose thinking is that, and is it any good?

Working with Theory

At this point, we step into a style of work that has a little more theory attached.

It is common for many of us to be scared of theory, to think it is a tool for people who are more intelligent and more educated than us. This is not true! Good theory, theory to change the world, needs to be understood by the many (the *hoy polloi*). Indeed, that's a

very good test. If you can't understand it after making a reasonable effort, perhaps aided with some mentoring support, it is suspect. Theory that is too difficult is sometimes generated by the Patrix, and contains plenty of misinformation and so is best avoided. Mainstream (neo-classical) economic theory is one such example (see *The Corruption of Economics*, 1994, Mason Gaffney and Fred Harrison).

So the thrust of this lesson is about how to make a reasonable effort and how to eliminate any internalized blocks ("I'm not bright enough, I'm too stupid…") we might have about not being smart enough to understand or work with theory.

The great advantage (of developing our confidence around theory) is that as Kurt Lewin[115] once said, "there is nothing quite so practical as a theory." It is worth checking out Kurt Lewin.

That's exactly right. To be effective when being practical, we need a theory (or least a theory in the making such as a *conjecture* or *hypothesis*). We may not be able to say what it is (articulate it) so sometimes we need to track back and deduce our theories from what we did and do. Then we can talk or write about them and so be ready to share them with others. This sharing of theories is a potent way to build collective intelligence.

Abstract conceptualization skills

To do this, you will need to call on and hone up your skills around what is called *"abstract conceptualization"*.

Abstract conceptualization is the process of making sense of the world through strong references to our own and other people's thinking, theories, models, research, data, and metaphors. We find these in the literature and/or through conversation with other

[115] http://infed.org/mobi/kurt-lewin-groups-experiential-learning-and-action-research/

engaged actors and/or we devise them ourselves.[116]

This mode of working is greatly aided by the use of the active reading parts of the ArCEA method previously introduced. Now is the time to extend ArCEA to include Critique and Expansion (the C and E in ArCEA).

ArCEA – Critique and Expansion

- **Critique**: means checking the presented content for negative and positive bias as well as noticing where the thinking falters and attempts to make unsubstantiated claims. Asking the following compound questions is helpful (feel free to pick them apart):

— *Who made this content*, on *whose behalf* (as in, *who commissioned it*) *for whom*? Who is expected to be influenced by it, and do they have the attention and access to contest it if they need to? and **for what purpose?**

- Are there *signs of Patrix* thinking here? (Patrix=the patriarchal matrix of oppressions)
- Is this thinking *consistent with the permaculture ethics*?

- **Extension**: means adding in your own thinking and references from your own knowledge garden, noting where you have unanswered questions (get these resolved soonest…)

Some strategies for due diligence

The ArCEA process need not be a heavy drain on our time. Using **keywords** and XM*ndmaps it is possible to go from start to finish of reading this five-page chapter (approximately 5*500 words) to

[116]You should make it a rule to check your own theory/models/thinking against that of other people, preferably people you know have a good reputation for thinking well in the field you are working in. This is what peer review means. If you find yourself thinking very differently than others do be prepared to justify why you diverge and what evidence you have for being so bold (but don't shy away from being bold!).

mapping it, in an hour or less–especially now we are becoming more skilled at this process.

Most good scholars use active learning disciplines like this to accelerate, extend and consolidate their un/learning. They understand that developing fluency using such tools requires frequent practice (just as in playing a musical instrument well).

The benefits are profound. We will have a much better grasp of ANY theory and any critiques thereof, both our own and other people's. It is a potent part of thinking for ourselves, and it is lifelong insurance against propaganda. This deconstruct/reconstruct process (finding keywords then assembling them in a map) is a foundation of **critical thinking**.

Choose which ponds of bias you swim in....

Where we look for other people's thinking is an important factor here. For example, looking amongst actors who are themselves engaged in ecosocial world-change work, will likely turn up very different results than might arise from looking to people focused on maintaining the neo-liberal destructivist project.

Patrix intrusions

We still need to be alert for Patrix thinking–that's thinking that somehow supports the continued life of memes to do with oppression and internalized oppression. These are not at all easy to spot, and this **Patrix outing** activity needs alertness and practice.

Whilst we make significant efforts to avoid blatant examples in Gaia U materials we are, like everybody else, swimming in a Patrix sea (just as fish not being able to 'see' the water they swim in, our normal culture may be partly invisible to us). We need all of our alert intelligences, ours and yours, on-deck to assist with this delicate and essential process.

Validation of thinking and theory

In any case, attention to **validation or plausibility of theory/-thinking** is important. Validation and plausibility are the subjects of the next few pages in this book.

How thinking develops: a model

One description of a progression of thinking, from initial insight to theory, is shown below.

- **An insight, a sensing**–something that we observe that we think is significant. This is something that we can begin to describe and which we are interested in trying out in various forms and in various situations to test how valid or plausible it is.

- **A conjecture**–something stronger now, something that appears valid and is strongly plausible (we believe it makes sense). Yet we don't really have enough evidence to be fully confident in either describing the thinking itself or the circumstances in which the thinking is an appropriate guide to action. However, in the current circumstances of rampant climate change with a tightly limited window of time during which we might succeed to take action to buffer against the worst effects, going with conjectures that we trust (or, indeed, insights we trust) generated by people we trust (including ourselves) needs to become the new norm. We simply don't have the time to 'wait' for conjecture to become accepted theory …

- **A hypothesis**–stronger still–good evidence is available, collected and cross-referenced. The thinking can be shown to be consistent with that of other people whose work is in good standing with what we might call the epistemic community (the community of people who 'know' about this field). The community is now ready to take on further work using the thinking to more thoroughly test its capacity for guiding constructive action (interventions).

Permaculture design, for example, is at least at this level (with some elements now attaining the dizzy heights of the next level, a theory…)

- **A theory**–now at the strongest level, the thinking is considered valid or plausible by a broad consensus (not necessarily or desirably unanimous) in the epistemic community and is used confidently by many actors to guide choices around actions and interventions at a strategic and visionary scale.

And then, of course, there may be a revolution in thinking in which case established theory might have to give way to something fresh and different. This thinking revolution is the original meaning of a paradigm shift.[117]

Our thinking community

In Gaia U and our emergent fields of regenerative ecosocial design, the transition to community resilience, REconomy and more, the questions:

"who is the epistemic community?"

"who is in good standing in it?"

and

"where are the peer-reviewed materials"

are, as yet, incompletely answered.

Thus we all need to take special care to do what we can to show our validations of our thinking in our Gaia U work.

[117]The classic text on 'paradigm shifts' is Thomas Kuhn's 1962 book, *The Structure of Scientific Revolutions.* [See a Wikipedia summary of it here.] (https://en.wikipedia.org/wiki/Paradigm_shift)

Validating thinking and testing for plausibility

For validation and plausibility we ask a series of overlapping questions:

- What is **my own best thinking?** Can I describe it (articulate it) and how does it connect to other insights and conjectures that I have developed?

- **Who else's thinking** (insights, conjectures, hypotheses, and theories) supports mine? Claiming a piece of thinking to be good because you arrived at it intuitively is not quite adequate. You need to track your own thinking processes and triangulate (cross-reference) your thinking with that of other people, especially people whose thinking and action inspire you. Writing out the story of how your thinking developed and acknowledging your references (conversations and discussions you've had, authors who you have read, workshops you have attended, videos watched…) also helps by enabling us to share our thinking and to get the benefit of feedback.

- Does **the broader literature** support my thinking? (what useful concepts, ideas, and models for understanding what's going on have already been developed by people who are/were working in the field).

Thus we will draw upon theories from books for explaining events. We'll recall familiar models, diagrams and graphs and invent new ones. We'll construct illuminating metaphors; apply systems of criticism; ask other people about their thinking; and otherwise, consider what other tools of knowledge and wisdom there are and how we can bring them to bear.

Throughout the validation/plausibility testing process, we will also pay attention to what we observe going on (mentally, physically, emotionally and spiritually) in ourselves and others. This will

enable us to report on the process of knowledge development as well as the content of the knowledge itself.

This work is mostly a delight as we improve our critical skills although it can sometimes be intellectually and emotionally challenging. Having supporting allies around helps a lot. Use colleagues and, when appropriate, the staff in Gaia U as much as you can for this.

How deep to go?

How much attention should you to pay to this?

How deep you go with searching for knowledge and validating/-critiquing will likely be a function of the program pathway you are on.

For example, a person working on a **Diploma program** (as differentiated from a degree program) is less likely to need to delve deeply into questions about what are the appropriate tools and systems of knowledge making and, instead, choose to become very good at functioning at **an operational level using already validated knowledge**. Note, however, that this does NOT mean that such a person will not generate original insights.

Examples of being operational could include becoming a competent designer and actor in the field of broad-acre rain-water harvesting and soil building systems, or a competent community facilitator running a mutual credit currency scheme.

In these cases, it is important to know that action learning, action research, action inquiry, transformative learning and the like are the guiding paradigms, but that it is not necessary to be able to critique these in depth.

Extending into a **degree program** however, does require us to be more conversant with the topics of the philosophy, the politics and

the sociology of knowledge-making. We should want to explore these and know something about the issues that are ablaze in these fields.

As we grow our capacities towards **Masters level** we should expect to take some responsibility for moving validated knowledge (generated both by ourselves and others) into the knowledge commons and to be aware that we are expected to contribute, in a strategic way, to the development of the epistemic community.

As we approach **Doctoral work** the design of the workings of, and population, of the knowledge commons needs to become a core part of our work. Here we are expected to be visionary contributors capable of deriving significant original knowledge from our long-term experience of significant and original actions.

The big picture: an epistemic community capable of critique

What is an epistemic community?

Epistemology is to do with how knowledge and wisdom are made (and by whom) and how a community judges if new thinking is good enough to use. At the other end of a continuum, epistemology helps us determine if the knowledge or wisdom has gone past it's sell-by-date (has gone bad) and should be let go off.

An epistemic community is a group of people who agree on the how's, who's and why's of knowing in a particular field.

Click this link for more:[118]

A key design concept currently emerging in Gaia U and the wider world-change community is that we are developing an (ecosocial)

[118] http://en.wikipedia.org/wiki/Epistemic_community

epistemic[119] community. (Gaia U Latina partner, Grifen Hope is credited with introducing the concept of epistemic community into our organizational design pot).

An epistemic community is conventionally defined as:

"...a network of professionals with recognized expertise and competence in a particular domain and an authoritative claim to policy-relevant knowledge within that domain or issue-area" [120]

Is this right for us?

Before we fully adopt this concept we might well want to redefine what it means to be a "professional," to describe how we go about recognizing expertise and competence in our domain (and ask ourselves "just what is our domain?") and think about how it is possible to be humbly authoritative without being elitist and exclusionary.

However, the general notion that we are seeking to be a community of competent, ecosocial, world-change practitioners with increasing influence in policy AND action at all levels seems a worthwhile goal.

Gaia U is undertaking to facilitate, with others, progress towards this goal. Your comments and participation are welcome.

Leverage

It is crucial that we consider and design our theory of knowledge (making). Why? Because knowledge making is strongly interrelated with the politics and sociology running in a culture at the time the

[119]The word epistemic comes from "epistemology" and for us in Gaia U means: the accepted yet dynamic approaches to the making of knowledge/wisdom and the processes used to adjudicate whether the current "stock of knowings" is consistent with core ecosocial values and is at least plausible (and maybe, verifiable).

[120]Peter M. Haas, "Introduction: Epistemic Communities and International Policy Coordination," International Organization, Vol. 46, No. 1, Knowledge, Power, and International Policy Coordination (Winter, 1992), pp. 1-35. MIT Press.

knowledge is made. See if you agree at the end of this next few pages.

For example, consider cultures that are in "forgetting mode" such as Britain after World War II (or the USA after the Korean War and the war in Vietnam). A political and social practice of resolutely looking forward came into being (and still exists) that made it very difficult for veterans to process their trauma; for researchers to analyze events leading up to the war that did/do not correspond to the political positions of the time; and for policymakers to learn from the errors of their pre-war international policies.

Cultures in denial like this don't often support knowledge making unless it glorifies or otherwise validates their primary way of thinking.

So, for us to work at taking charge of our own knowledge making and the methods we use is a powerful liberation strategy. This allows us to imagine that another, ecosocial culture, is possible.

Politics and sociology

The politics and sociology of knowledge means considering issues such as **know-how** (how ideas are created, validated or become considered plausible), **know-what** (where the focus of attention goes), **who-knows** (who creates, validates, owns or has access to the knowledge) and what-for (for what purposes is the knowledge used). We'll develop these 4 aspects below.

know-how	how knowledge/wisdom are created, validated or considered plausible
know-what	where the focus of knowledge making attention goes (who directs the making)
who-knows	who owns or has access to the knowledge produced and who decides what's good/bad
what-for	for what purposes is the knowledge made and used (oppression or liberation?)

On the next pages, we offer some lightly sketched thoughts arising from considerations of the politics, sociology, and philosophy of knowledge.

There is a good deal of further work to be done before we can imagine that we have a reasonably comprehensive description of an appropriate knowledge making system for our ecosocial epistemic community.

Therefore, what we include here are markers, a few flags in the ground. They are there to remind us that we need to come back and figure out, together, what are the culture, theories, methods, models, metaphors, myths and intentions of our epistemic ecosocial community. We also need to discover what the worldview that renders this plausible and valuable looks like.

Notes on know-how…

know-how	how knowledge/wisdom are created and validated
know-what	where the focus of knowledge making attention goes
who-knows	who owns or has access to the knowledge produced
what-for	for what purposes is the knowledge made and used

In the first place we (the epistemic community that includes Gaia U) are strongly oriented towards knowledge that we know *works* (as demonstrated through our own experiences and the experience of others). We are much less enamored of knowledge that makes for elegant theory but which is not useful in assisting us to make good interventions in the systems and projects with which we are involved.

This may sound obvious, but there are significant fields of theory that do not set much store by practical results. Economics is one such field, and even critics from inside the field despair at the impracticality of economic theory. Here is Ariel Rubinstein, a leading practitioner in the field quoted in Tony Lawson's paper – *"Economics and Critical Realism" – (pp. 369–2005)

The issue of interpreting economic theory is…the most serious problem now facing economic theorists. The feeling among many of us can be summarized as follows. Economic theory should deal with the real world. It is not a branch of abstract mathematics even though it utilizes mathematical tools.

Since it is about the real world, people expect the theory to prove useful in achieving practical goals. But economic theory has not delivered the goods. Predictions from economic theory are not nearly as accurate as those by the natural sciences, and the link between economic theory and practical problems…is tenuous at best. (1995)*

Rubinstein also writes in his recent 2012 book, *Economic Fables*[121]:

"I had the good fortune to grow up in a wonderful area of Jerusalem, surrounded by a diverse range of people: Rabbi Meizel, the communist Sala Marcel, my widowed Aunt Hannah, and the intellectual Yacovson. As far as I'm concerned, the opinion of such people is just as authoritative for making social and economic decisions as the opinion of an expert using a model."

Secondly, we prefer knowledge that assumes we are an integral part of nature (and society) and not some remote observers of these meta-systems. This is in direct contradiction to the "objective observer" myth promoted by some physical sciences. This philosophical and practical position of where we stand in relation to the rest of life could be termed an "ontology."

Notes on know-what....

know-how	how knowledge/wisdom are created and validated
know-what	where the focus of knowledge making attention goes
who-knows	who owns or has access to the knowledge produced
what-for	for what purposes is the knowledge made and used

In 1989, the Institute of Development Studies (IDS) at Sussex University, England published *Farmer First,* a book strongly promoting the notion that (at least some) professional agricultural researchers should redirect their efforts away from the agendas of corporations selling fertilizers, machinery, pesticides, and credit and move towards meeting the agendas of small farmers (mostly women) who are, in fact, the primary producers of the world.

Their point is that research directed by the farmers themselves

[121] http://www.openbookpublishers.com/product/136/economic-fables

would likely be low tech, low cost and yet super-effective and, most likely, permacultural. That is, the *know-what* would be very different. Incidentally, the book was republished and updated in 2009.

The IDS diplomatically describe their "Farmer First" mode as complementary and not intended to eliminate conventional research, but the inferences are clear. If small-scale farmers were in charge of at least some part of the research pie, and, if that research effort focused on validating and communicating their existing and developing knowledge, then the future direction of agriculture would change towards sustainable and regenerative practices.

Meanwhile, the status of farmers (mostly women) themselves would upgrade to world leaders in an essential, complex field (farming to mitigate climate change, create food security and community resilience…). This elevated status would come with better security around land access, an increased income, and enhanced self-esteem.

Notes on who-knows….

know-how	how knowledge/wisdom are created and validated
know-what	where the focus of knowledge making attention goes
who-knows	who owns or has access to the knowledge produced
what-for	for what purposes is the knowledge made and used

We are in a world of paradox. Massive amounts of knowledge and information flow freely via the internet (although that is restricted in several countries) whilst, meanwhile, the knowledge generated by professional knowledge makers in the global Academy is being increasingly corralled and enclosed.

In effect, this "walled garden" or "enclosure" online creates an increasing threat to democratic principles of informed citizens and academic principles of building on the shoulders of giants. Looks are deceiving: while it appears that we have more, we actually have less and less. (Charlotte Hess and Elinor Ostrum, 2007)

Many of us are unaware of how a few wealthy and privately owned commercial publishing corporations have been buying up academic journals and mining these for profit by increasing the price of subscriptions (up 220% since 1986 – see quote below).

University libraries the world over are being obliged to reduce the number of journals they subscribe to ($20,000 and more a year is a typical, single-title subscription).

Dependence on the private sector for scholarly journals essentially compels universities to finance research, give it away to for-profit publishers for free, and then buy it back at astronomical prices. Because of the extraordinary increases in journal costs-220 percent since 1986 (compared to an increase in the consumer price index of 64 percent) – research libraries have had no recourse but to cut many of their journal subscriptions. (Charlotte Hess and Elinor Ostrum, 2007)

Therefore we might prefer and support knowledge making systems that prioritize open source publication of knowledge and even, open source prioritization of research efforts.

(Editor's note: The internet makes the goals of both open source publication and open source research priorities eminently achievable. However, both tasks need consistent attention to the development of systems and the training of people to use them. These include associates looking for strategic projects, who are digitally literate and who can sustain some volunteer effort in these fields. They are invited to join the Gaia U efforts to contribute to the development of systems for the ecosocial knowledge commons).

Notes on what-for…

know-how	how knowledge/wisdom are created and validated
know-what	where the focus of knowledge making attention goes
who-knows	who owns or has access to the knowledge produced
what-for	for what purposes is the knowledge made and used

For the most part, we are operating inside complex (and tending-to-chaotic) situations.

In these situations cause and effect cannot be readily established, if at all. In complex situations, we must use our capacities for *sensing* in order to notice positive and negative emergent properties. Then we can choose how and when to intervene, and at this point, we still cannot predict the outcomes. We will discuss this more in an element on Design in the chapters ahead.

Therefore, useful knowledge is knowledge that helps us to think well about and navigate these challenging realms (of complexity and tending-to-chaos).

Knowledge gained from reductionist laboratory experiments in which all variables except one are removed from the situation with the goal of demonstrating clear causality (that this much adjustment of this isolated variable has this type and magnitude of effect) is much less likely to be useful. Yet this paradigm (positivist science) is still the dominant knowledge creation paradigm in use despite legions of social scientists making very able attempts to transcend it for their purposes.

The Patrix Conjecture may be helpful in explaining the continued dominance of this paradigm.

This conjecture would suggest that the positivist science philosophy is, itself, derived from the thinking and interests of the dominant

layers of society. Originally the mercantile class, and now the international financial community, the local owning and professional classes, the corporations, government and military, and the law-enforcement agencies are the driving interests behind this philosophy.

The existence of these layers (and the corollary subordinate layers) IS The Patrix (patriarchal matrix) in action.

Long-term observers of The Patrix note that it has an astonishing capacity to adapt itself to function almost invisibly within new conditions, that, at first sight, expressly reject its existence.

For example, there is evidence emerging (Christian, 2012; Ruz, 2012) from the long-term intentional community/ecovillage movement which was expressly established to generate inclusive, evolved, village-scale democracies. This evidence shows some of these communities deteriorating into frustrated collections of worn-out visionaries dominated by the brittle few who seize power under the consensus with unanimity rules.

Never mind that these rules were explicitly designed to eliminate the possibility of such bullying. The Patrix is readily capable of slipping through the massive gaps now evident in the naive (in retrospect) consensus philosophy.

On a much larger scale see *The New Jim Crow* by Michelle Alexander, a book that proposes, with detailed and convincing evidence, that the current USA led War on Drugs is an extension of the racism that was initially developed 400 years ago to justify first slavery and later, segregation.

Thus racism, a core feature of The Patrix, has morphed itself in such a way that it can thrive in virulent and devastating form, especially for poor urban African Americans and Latinos in the USA, without being seen as such.

We'll discuss the Patrix Conjecture further in the next element, "Thinking about Worldviews."

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Learning/Unlearning models: why this meta-topic?

Why learn about un/learning?

Why learn about theories and models of un/learning?

[122] http://portfolios.gaiauniversity.org/view/view.php?t=NDpF4zkmslnuOQWvEtLV
[123] http://portfolios.gaiauniversity.org/view/view.php?t=NDpF4zkmslnuOQWvEtLV

"There is nothing quite so practical as a theory" – Kurt Lewin[124]

Back in the 1990s, when the permaculture community in England was seeking to bring forth their version of The Permaculture Academy, we met several times to reflect on, amongst other things, what pedagogy of permaculture we should adopt (if any).

Pedagogy meant, to us, the methods and practices of learning and teaching. We were looking for something congruent with the way of thinking (of nature, systems-oriented, social…) proposed by permaculture.

First we described to each other how we were learning to be permaculture designers (by discovery, by action, through emergence, by experience, by playing, by comparing stories, by asking each other for advice and mentoring…) and then we looked to see if we could find any reference to this approach to learning in the literature.

We were keen to find something for several reasons:

- We could then more easily describe our approach to people already in the educational field and therefore more readily show ourselves to be legitimate (and possibly gain access to the very substantial resources already committed to the field of education)…

- We would have to hand, from the get-go, the valuable insights that experienced researchers had developed and articulated around the chosen pedagogy so we'd be able to hit the ground running…

- The method/theory would be bigger than any of us as individuals so we'd be less likely to get caught up in opinionated conflicts (which is often an issue amongst pioneer groups)…

- Our un/learning community would have a shared language with which we could hold those all-important meta-conversations about how our un/learning was going and where, as individuals, we felt strong and/or challenged and where we saw the opportunities for growth…

[124] http://infed.org/mobi/kurt-lewin-groups-experiential-learning-and-action-research/

- We wanted to use an approach that was congruent with the topic, the task and the context which we understood to be bringing permaculture design thinking and the projects it spawned into being in a culture that had no real sense that such projects were needed…

We were also prepared not to find anything useful and to make up our own if necessary!

Over time we did indeed find several highly useful models and theories. In true permaculture design style, we assembled these into a complex, adaptive and potent ecosystem that forms the basis of the "pedagogy" in Gaia University today.

This has been of powerful utility as it has enabled us to describe our "espoused theory" (of transformation and un/learning through engaged action) in some detail and then construct our un-institution (Gaia U) to be congruent with this theory so that, by and large, our espoused theory (what we say we do) matches our theory-in-action (what we actually do). It is an unusual level of congruence to find in the world today.

Note that the pedagogical eco-system is in continual refresh mode. When new materials of relevance show up, they are added, and meanwhile, other materials that prove unfounded are shed.

For example, in the shedding category, there is the popular theory which proposed that people could/should be classified as Visual, Auditory or Kinesthetic learners (learning styles) that were front and center in our lexicon at one time. That theory has now been sidelined.

This is because further research[125], our own experience, and our recent understanding around growth mindsets show that we are all quite capable of functioning flexibly in all modes. Growth mindset does, however, require that we deconstruct any distresses that come up when dealing with learning opportunities that arrive in a way

[125] http://blog.cathy-moore.com/2010/09/learning-styles-worth-our-time/

that re-stimulates (triggers) us.

Meanwhile, as part of our "taking-on" of new thinking, we have added Theory 'U'[126] as an up-to-date way of describing the trajectory and process of transition. More new thinking will come.

What can you do with this?

After working through this element, you should be able to articulate (speak, write, and draw…) how your own models/theories of learning and unlearning compare and contrast with what's offered here.

Your own stories (of how you come to be who you are, some of which you have already outlined in your Mini Life and Career Review) can be further developed according to your interpretations of, for example, what modes of experiential learning were strong in each story for you?

You can expect to describe your own thinking and show how it connects/disconnects with the thinking of others in a way that illustrates your capacity to draw out, critique, and re-assemble (with additional materials that work for you) the concepts in here and to make references to your sources of thinking. These might include other generators of concepts, models, theories, your own experience, for example.

You are also expected to be able to do some diagnostic work using the models here that will enable you to become more agile in your learning and unlearning. Doing so can help you to round out your un/learning skill flex as we think of it in Gaia U.

A person reading and reviewing your work would then have a clear sense that you are actively engaged with noticing your un/learning capacities. They will also notice that you can reflect on and see what would benefit from additional attention as well as your ability

[126] https://www.presencing.com/node/109

to conceptualize and explain your own pedagogy. Finally, they might notice that you can design experiments to see how to push past any blocks you might have–ready to incorporate fresh skills into your flex.

How to use Gaia U books: selectively!

You are invited to be selective when choosing what to read in our books.

Expect to use each book more than once so that you can go deeper each time you work through it. Think of this approach as "iterative reading" and/or "iterative thinking" in which you revisit the models and theories over the course of years as you:

- test them for validity and plausibility (is there any truth in them according to your own experiences?)

- judge them consistent or not with later thinking (are they contradicted by later research and what does a contradiction like this mean? – e.g., does the contradictory research come from a perspective that you think of as valid and thus you need to let go of the original thinking and/or is the contradictory research from a flawed perspective and so you can–-indeed, better had– ignore it…),

and,

are they, the theories and models, useful?

Andrew writes: When thinking about **useful** as a criterion I am reminded of the early industrial period Theory of Miasma[127], popular throughout Europe, India, and China until finally superseded (proved inaccurate) in the late 1800s.

"Miasma was considered to be a poisonous vapor or mist filled with particles from decomposed matter (miasmata) that caused

[127] https://en.wikipedia.org/wiki/Miasma_theory

illnesses. The Miasmatic position was that diseases were the product of environmental factors such as contaminated water, foul air, and poor hygienic conditions. Such infection was not passed between individuals but would affect individuals who resided within the particular locale that gave rise to such vapors. It was identifiable by its foul smell."

Whilst this theory was finally replaced by current germ theory (which accounts for disease proliferation both by physical contact and by other means of germ distribution) at least the miasmatic theory provided early sanitary engineers with a clear motive and theory to use when designing sewage systems that prevented foul smells refluxing back into dwellings and otherwise avoided exposed, un-drained, and contaminated collection of water.

So whilst the theory has moved on (and will move on again), the actions that it sponsored (in many cases) were positive (although there were also examples of the theory being used to avoid taking action to improve the conditions that caused contagion).

Therefore, be alert to the possibility that you might currently be working from theory that may later prove to be incorrect (or, unbeknownst to you, has already been declared invalid) and yet may still yield useful results.

Please skim over the whole next chapter and drill down where you feel attracted (or repulsed). Look at the chapters in sequence or at random. They are arranged in a roughly chronological timeline with the oldest material first. Use any other reading strategy you choose or invent that works for your schedule and commitments.

Engaged un/learning models: a collection to extend from

Action learning

A favorite source of inspiration for Gaia U actionists is **action learning**, apparently first codified by Reg Revans from England in the 1960s.

Core concept--the action learning set

Action learning involves **people** from various fields of engagement (projects, workplaces…) coming together (as an action learning set) to talk through the issues they are experiencing with a view to **supporting each other to think well and more widely** about their own situations.

The participants listen to each other as they tell their situational stories and also seek to extend each other's thinking through **asking questions** that promote insightful responses. The aim is to uncover patterns that possibly inform actors across all fields (which is, essentially, a systems view).

An example

A group of city planners/engineers from different cities meet up. All are working on increasing opportunities for stormwater runoff to be absorbed as a groundwater recharge resource in their cities. Using the Four Questions method promoted by Gaia U, each member speaks in turn to:

What's going well for me and us in our City in relation to the topic?

What's challenging me and us in our City relation to the topic?

What are my/our long-term goals and visions in relation to the topic?
and

What are my/our next achievable steps in relation to the topic?

(The Four Questions is one of several formats that can be used and many action learning sets use a facilitator to guide the process)

This way the group gets to see good and emergent practices. They also see the unique problems faced by the presenter and can maybe predict (and thus strategize about) problems and resistances they may encounter in their own city. Maybe the group is also sparked into some fresh creative thinking.

After each member presents the remaining set members initiate a development conversation by using devices such as:

"what I would do in your situation is…"

and

"your work stimulates the following thinking for me…"

and by asking assumption busting questions such as,

"if budget restrictions did not exist what would you do then…?"

Complex situations

A critical idea is that it is not possible for individuals to fully know complex situations nor may they fully comprehend the other's context (the local person has the best knowledge of local context, and even the locals will have only partial knowledge). Therefore prescribed solutions or best practices, although a common feature of many problem-solving cultures are of limited value. What counts is the flexible (collective) intelligence of the actors working to develop tentative options for trial using their own experiences as a guide.

Social collaboration

Classic action learning is a social, collaborative activity and a group might meet once a month for a year or more. Six people meeting

for a day and taking an hour each for the Four Questions – (i) what's going well, (ii) what's challenging, (iii) what are my long-term visions and goals, (iv) what are my next achievable steps – is a great pattern and could readily be done online.

Collaboration (or colleagues working together) is still a relatively uncommon activity. Some of us live in cultures that have strong "individualistic" imperatives of competition that are hard to dissolve.

Yet, because of the increasing complexity arising in our global context (not the least of which is the pressing need to resolve different worldviews into action for ecosocial regeneration), dissolve them we must.

Your challenge

- Take a moment to think about your own capacities for collaboration and working with other people. Ask yourself "how could I get more fluent at that" and "what gets in the way."

- Save these thoughts and be ready to add them into your expanded Life and Career Review if that is a part of your work in the future…

- Decide to set up an action learning group for yourself…

Decreasing reliance on outside experts

Action learning is an empowerment technique that works to assist members of the group to notice their own and others capacities for sensing opportunities to make changes, and engaging in creative thinking. Critically, when practiced in an organized set it provides a trusted, safe place for mutual and constructive support. In this respect, it is strongly focused on reducing the hierarchical assumptions that only senior experts can find solutions to complicated and complex problems. These days, and in groups with the emotional bandwidth, we'd power it up with Re-evaluation Counseling sessions.

Formula

Of particular interest (and representing a particular style of describing theory and models) is the Revans/Marquart formula:

Learning = Programming (content) + Questions (of various sorts) + Reflection

Wikipedia has a good overview of action learning here.[128]

Gaia U roots in action learning

IMC Association (IMC), the organization that first accredited Gaia University, was founded in action learning and was strongly supported by Reg Revans during his active life.

IMC was focused on developing managers in the business world. In the process of Gaia University making a relationship with IMC Association in 2004, we found it useful to describe ourselves (all of us in the ecosocial world-change community) as "managers" (people taking leadership) in the grand ecosocial "corporation" (thousands of projects in a potential network).

This "systems view" metaphor, or pattern, was a great aid towards mutual understanding across the two organizations.

Other action-based approaches

Since the 1960s there has been an explosion of interest in action-based approaches.

Some of these have sought to apply academic mystification to action learning (which is sometimes thought of as too hands-on, a little too vocational, possibly rather working-class, perhaps somewhat lacking in intellectual rigor by some scholars).

[128] https://en.wikipedia.org/wiki/Action_learning

Others have been concerned to continue to deconstruct the myth of the "objective outsider," and yet others have introduced novel features and extended the thinking.

This has not been an organized, orderly process. It has all the characteristics of an emergent system in which there are a dozen, overlapping schools of thought developing without necessarily referencing each other (and sometimes claiming the intellectual high ground).

This may be familiar to you as it is very similar to the situation regarding the ecosocial movements we are all part of… and at least, some of the diversity is useful.

However, it is a little overwhelming to get to grips with the whole field. Yet there is a wealth of informative thinking and practice contained therein.

Here are some of the principal branches that you may like to explore.

- **Action Research**[129] – which may have a tendency to reinvent the myth of the objective outsider and also may reinforce memes such as positivist, or Patrix dominated/materialistic, science;

- **Participatory Action Research**[130] – an explicitly Latin American development (Paulo Freire and Orlando Fals Borda) that emphasizes critical pedagogy and emancipation issues. This is especially important as liberation from The Patrix is an explicit goal;

- **Praxis Intervention**[131] – that looks for ways in which the researcher can bring support resources to the grassroots participants in order that they, the grassroots, can develop better self-help approaches (clearly intended as a patrix-busting approach although it requires the researcher to come with a genuine sense of being of service);

[129] https://en.wikipedia.org/wiki/Action_research
[130] https://en.wikipedia.org/wiki/Participatory_action_research
[131] https://en.wikipedia.org/wiki/Praxis_intervention

- **Action Inquiry**[132] – (has a big emphasis on the development of leadership and a very helpful perspective on the issue of timing as a significant dimension of interventions in systems. That is, a good idea at the wrong time gets nowhere whilst at the right time it takes off like wildfire (and a horrible idea, neo-fascism for example, can gain traction if the timing is right).

Reg Revans (of action learning) warned against possible "over theorization" that could occur once the conventional Academy got its hands on action learning. Maybe, after you have looked at some of the derivatives linked above, you might think he was right?

Let us know…

Experiential Learning

Now we progress to some helpful detail regarding the "modalities" or "aspects" of learning by doing.

Just how can we describe the different aspects of learning through action (learning by doing or experiential learning)?

These range from i) hands-on doing, ii) debriefing successes and disasters, iii) looking for clues as to how to do things better next time, and iv) trying out experimental approaches in less than full risk situations…

Enter Kolb's model

David Kolb is very well known for his 1980's analysis of the qualitatively different activities and approaches required of well-rounded experiential learners.

His descriptions of the four dimensions of experiential learning allow us to do some powerful reflection on our own skill-flexes

[132] http://www.williamrtorbert.com/action-inquiry/

as self-foraging action learners. But, be warned, he used difficult terminology to label his model (to give it academic respectability?).

Likewise, Kolb was convinced of the idea (along with many others) that you and I might have a distinct learning style (as if this style was a fixture of your personality).

Nowadays we prefer to imagine that each of us has an infinite and flexible capacity to develop skills in all modalities, especially as we now have tools (like Re-evaluation Counseling) to eliminate any distresses we might have acquired around learning and unlearning. There is good evidence for this 'flex' approach.[133]

Complete Spiral - The Gaia U interpretation of Kolb's Model)

Kolb's model is widely quoted, modified, embellished and critiqued.[134]

You will notice that this Gaia U book makes use of the infed[135] (informal education) website. It is highly recommended for self-foraging purposes.

Using the Kolb (Gaia U version) model: CE & RO (hands-on doing; debriefing successes and disasters)

Andrew writes: The Kolb model is one of my favorites. It was such a delight for me to find that someone had thought through the process of experiential learning in such a way as to give it substance and enough hooks (and metaphor coming up…) to which I could apply my rope and pulley system.

Consequently, I have been able to heave it up and down; drag it from place to place; and make it work for me without it breaking.

[133]Here is a critique of the idea of learning styles from Cathy Moore and then, if you want to delve into the Kolb ideas of learning style, you can go here. Note: it's long!

[134]A critique of Kolb's work on Experiential Learning can be found at http://infed.org/mobi/david-a-kolb-on-experiential-learning/.

[135]http://www.infed.org

This is a sign of good theory. If you can push and pull it to work in multiple situations and it is still helpful, you can tell it is resilient and based on good observation.

It is through the manipulation of models like this that I get to understand them and appreciate their value…

The Gaia U addition is to do with our understanding of distresses. Distresses are installed patterns of non-thinking that accumulate in a person's psyche. Over time these occupy a large portion of our minds rendering us less and less capable of being in the world in an open and flexible way. We become more rigid and fixed in our thinking as we accumulate more distresses. Significant distresses arise early in life and can interfere with our confidence and flexibility in learning and unlearning.

Some of us even grow up to believe we are stupid, that we can't understand 'theory' and that, therefore, we have no right to think about creative ways in which our cultures could be different. By this means we are encouraged to give our power away to 'experts' who we are taught 'know better than us' even when these 'experts' are clearly partisan and hold worldviews that are hostile to our surthrival.

Hence we embed the Kolb model in a background context that acknowledges that these distresses exist while also acknowledging that these distresses, *having been installed, can also be de-installed* - eliminating these and restoring our full, flexible intelligences is one of our Gaia U goals.

Meanwhile Here are some of the hooks I like to pull on and some short descriptions of the sense I derive from them:

Hook 1 – Concrete Experience (CE) - the hands-on doing mode

The doing part of learning from experience in which we dance with the paradox of being fully engaged in the doing and yet keep

some of our attention available for noticing how things are going (sensing), ready to call a time-out if pauses and adjustments are called for.

Questions I ask when doing are:

- Am I able to fully engage? (sometimes my attention is being pulled elsewhere…)

- Are my senses, including spatial awareness, working well? (This is a long-term question and, in my case, I have worked to overcome a severe case of tunnel-vision, common amongst men, that previously interfered with my capacity to see the "whole" field.)

- Am I making things go better for everybody (including myself) in some ways?

- How is my stamina, hunger, hydration, strength, and self-care? I need to avoid exhausting myself these days as the quality of my thinking/doing deteriorates fast when I am tired.

- How am I feeling and how do others seem to be feeling? It is best to check-in and find out…

- Is my neck free? (I am an Alexander Technique[136] fan, and this is always a critical question Alexander Technique folk ask when engaged in doing).

What questions come up for you when reflecting on doing?!

Take a moment to note these ready to use in your Life and Career Review (comes much later).

Hook 2 – Reflective Observation (RO) - the debriefing successes and disasters mode

This is the time to gather together the information sensed during the doing and also a time for a critical (AND celebratory: Dragon Dreaming[137] style) look at the overall outcomes in relation to the

[136] http://www.alexandertechnique.com
[137] http://www.dragondreaming.org/dragondreaming/what-is-it-exactly/

goals and visions. This is the perfect moment to assemble an action learning group and to use the go-around and think and listen approaches to hear from the members of the group.

Reflection questions I ask are:

- What went well? (and, to use an Appreciative Inquiry[138] way of thinking, how could I make sure that we get more of this next time?)

- What was challenging/difficult and why? (and how could I see to it that we get less of this next time?)

- What would I do differently next time? (a question that helps me to engage gently in self-critique that yields concrete next steps)

- What got re-stimulated/triggered for me? (important to notice these but **not act on them** at the time and, instead, take them to my Re-evaluation Counseling sessions or consider using other anti-trigger systems such as Non-Violent Communication to defuse them)

- Were there any critical incidents? (moments when the whole energy of the "doing" changed for **better or worse**) and why?

- Is my neck free? (Alexander Technique again! …but always an essential question for me to ask)

What questions come up for you when thinking about reflecting?!

Note these for use in your extended Life and Career Review (LCR), your first Output Packet in the educational program!

Sensing

This combination, of active doing (CE) and reflection (RO) develops our capacity for **sensing** which increases our ability to be running both modes (CE and RO) in parallel. That is, we get better and better at noticing how our concrete actions are affecting the situation *at*

[138] https://appreciativeinquiry.champlain.edu/learn/appreciative-inquiry-introduction/

the time thus giving us the opportunity to change our behaviors in the *now* to get a different and more functional response rather than plow on 'doing' the previous 'doing' that is clearly not working as intended.

Using the Kolb/GU model: AC & AE

Hook 3 – Abstract Conceptualization (AC)

This "hook" has been the most difficult for me to get a grip on. Abstract conceptualization, what on earth is that!

But I think I understand it enough for it to be useful these days. It has to do with being able to handle models, theories, data, make sense of research and find metaphors to make abstract ideas concrete enough to be useful.

It includes a capacity to know my own worldview and biases and to be able to identify the worldview and biases of people whose work I want to explore. I have a strong sense these days that everybody has a valuable part of the picture that I want to incorporate whilst, at the same time, they are just as likely as me to show distress in some of their thinking. I need to be able to spot their distresses AND acknowledge their valid and valuable insights.

Questions I ask when abstractly conceptualizing are:

- What theories, models, metaphors, research, and data can I find and draw on to help me widen the conceptual framework for making sense and meaning of my experiences?

- Is my worldview coherent, flexible and capable of absorbing new thinking?

- How are my perspectives contaminated by my distress patterns (The Patrix)?

- What are the likely distress patterns of any sources I am using (who are these people and whose agendas do they support)? What

can I trust from them? What do I need to discard?

- Does anybody else think like me?

- Is my neck free…?

What questions come up for you when you are experimenting with the idea of thinking?

Get these thoughts down ready for your LCR.

Hook 4 – Active Experimentation (AE)

Active experimentation has become a strong theme for me these days as I am often working with tools and ideas that are new to me and in contexts that are at least complex (no obvious causalities) and I am not at all sure what responses will show up. Where possible then, I try out ideas, rapid prototype style, by building out the idea just enough so it functions enough to be a clear demonstration. This way, other people can engage with it and provide valuable feedback.

Note though, that people have quite a range of tolerances for unfinished prototypes - people with early adopter flexibility can handle more rough edges than most so enjoy the opportunity to play with something experimental. Other folks will dismiss my designs if they are not fully functional and polished. Some judgment and setting of expectations are needed when issuing prototypes for the purpose of gathering feedback.

It is a phase that I have commonly left out of my approach in the past preferring instead to overthink things **when a quick trial would have relieved me of the need to endlessly speculate**…

Questions about active experimentation include:

- How many ways can I trial the quality of my design thinking before committing to full scale roll out?

- Can I rapid-prototype any of the elements and/or the whole system and get feedback now before trying to "do" the job?

- Just how does this work?

- Will all the elements I want to include in my design fit in the space available?

- Is my neck free? (oh, not again!)

What questions come up for you when you are doing active experimentation?

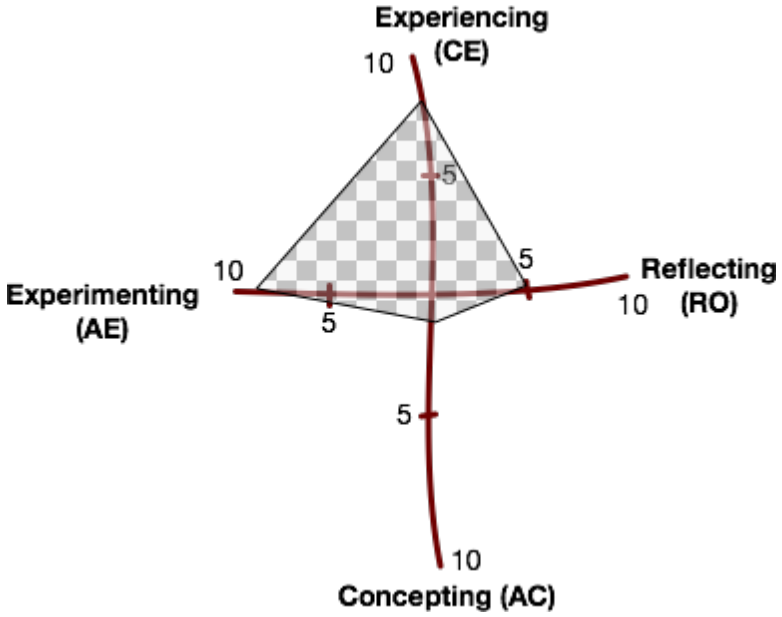
Another opportunity to jot down notes for your Life and Career Review (LCR).

****On completing a turn around the spiral

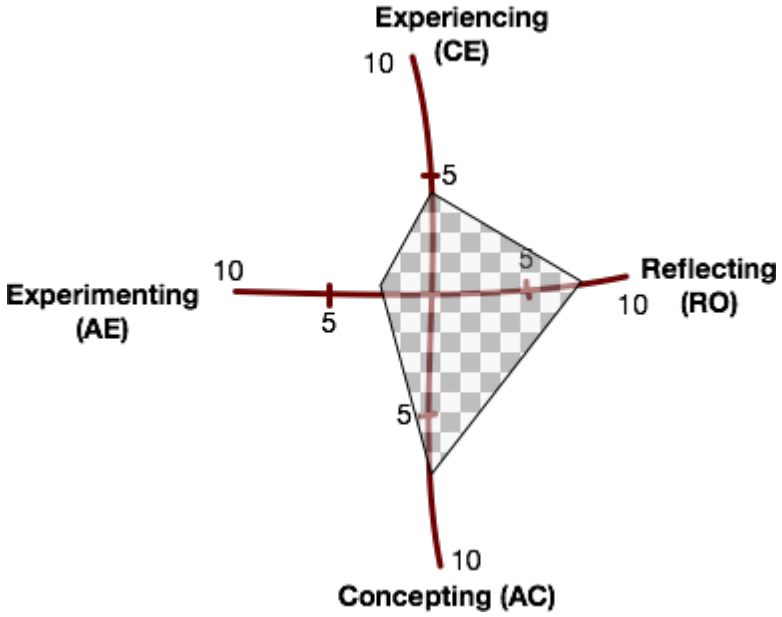
The notion is that each time we go around the spiral, attending to each of the modes, we increase our capacity for designing and taking effective action. Similarly, every time we work at any of the modes, we build capacity in these too. So, if we start with relatively weak capacities around, say, Active Experimentation, and we then deliberately practice doing that, we'll become more fluent and skilled at that mode. This is clearly an attractive strategy!

Using the model - Kites & Profiles

A quadrant model like this is just asking to be used as a diagnostic tool. If we inscribe each of the "arms" with a "kite" shape as in the two examples below. The kite, or profile, will tell us a thing or two and suggest to us where we might like to develop better capacities.

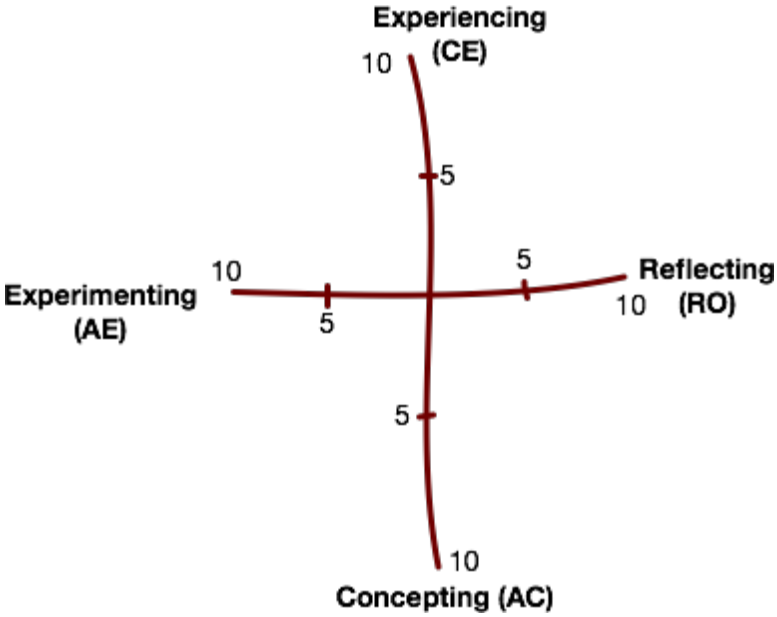


Above – A person with this profile is probably very good at doing things and tweaking the designs of jobs and artifacts but is maybe limited (we'd say, by distress) in their capacity to see the bigger picture and to shift their thinking flexibly to accommodate new ideas.



Above – A person with this profile is likely a practiced thinker with good knowledge of the field although their thinking may have little grounding in either tests or real-life situations. Their distresses may have them resist applications of their thinking to "messy" live situations as these could disturb the elegance of their theories.

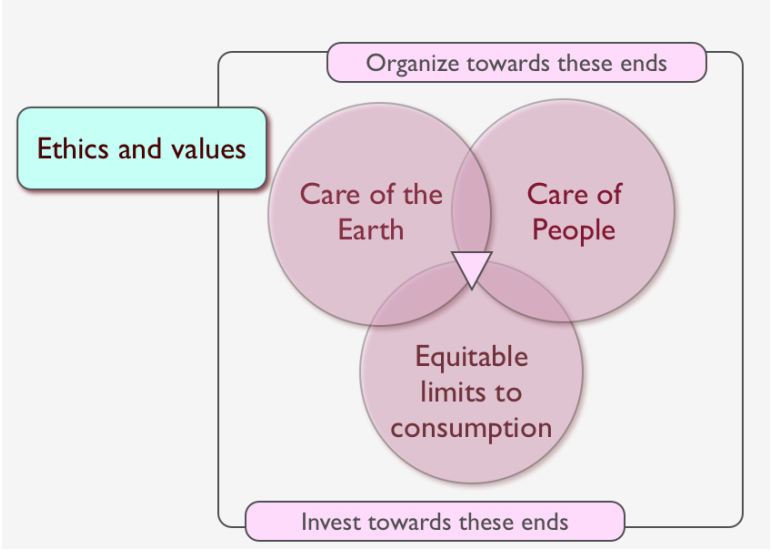
What does your own kite look like?



Engaged Pedagogy, Critical Praxis and seeing off the Patrix

Warning! Experiential learning, as described by Kolb and others, is just as much at home in the service of neoliberalism and globalization as it is in the service of ecosocial progressives. It could be described as politically neutral and easy to co-opt.

To sharpen things up, we need to look at ways of learning and unlearning that have world change, according to the permaculture ethics, on the agenda.



Margaret Ledwith has written a strong piece around this theme. Ledwith, Margaret (2007) 'Reclaiming the radical agenda: a critical approach to community development,' *Concept* Vol.17, No.2, 2007, pp. 8-12. Reproduced in the Encyclopaedia of Informal Education[139].

Here we move into the crucial fields of critical pedagogy, engaged pedagogy (bell hooks[140]) and praxis[141] (Paulo Friere[142] and others).

We are not delving deep into the fields of critical and engaged pedagogy here, although we do consider them essential if we are to emerge new human cultures that are not merely rearrangements of old oppressions. This is because using intellectual tools only (cognitive tools like thinking, discussing, reading, theorizing, researching) to work on eliminating oppressions is often not enough. Our wisdom says that we also need active doing/feeling tools for working with emotions and feelings.

[139] http://www.infed.org/community/critical_community_development.htm
[140] http://infed.org/mobi/bell-hooks-on-education/
[141] http://infed.org/mobi/what-is-praxis/
[142] http://infed.org/mobi/paulo-freire-dialogue-praxis-and-education/

Liberation from oppression (both as a receiver and as a giver) is a lifelong process that involves a sustained effort in coming to recognize and eliminate our own hidden oppressor patterns, our (also hidden) patterns of internalized oppression (through which we act as victims), and the similar patterns of others. Doing this by only intellectual means is slow, ineffective and often incomplete. It leaves open the possibility of reinfection.

It is common, for example, for progressive left thinkers to be intellectually clear about the need to liberate people from the effects of the class system but not notice either that racism, gender oppression, anti-semitism, homophobia, and many more oppressive memes intersect with class oppression and also need attention. Or they may not recognize that their own thinking may be subject to distortion through the operation of their own hidden patterns.

It is also common for a group of people to identify themselves as "the oppressed" and other people as "the oppressors," an analysis that is incomplete and often raises strong feelings of hostility towards "oppressors" (when, according to the theory of intersectionality,[143] the theory of the matrix of domination[144] (The "Patrix" as we call it in Gaia U speak) and according to the thinking in Re-evaluation Counseling,[145] we are all programmed to receive AND deliver oppression).

Clearing The Patrix from our lives, the lives of others, and from the designs we have on human cultures is priority work. It requires a sharp, flexible, and focused tool-set that comes with the support of committed allies who are themselves working on their own liberation.

Thinking about and espousing liberation is essential as is acting free of the Patrix. However, as suggested earlier (War on Drugs as racism), the Patrix is quite capable of showing up even in cultures and people who have rejected it at the thinking level. There is

[143] https://en.wikipedia.org/wiki/Intersectionality#Interlocking_Matrix_of_Oppression
[144] https://en.wikipedia.org/wiki/Matrix_of_domination
[145] https://www.rc.org

deeper work to be done, work that involves guilt-free explorations of how the Patrix was laid-in for each person and that allows us to purge the hurts these installations have caused us.

We are active in creating a Re-evaluation Counseling Community (www.rc.org) in Gaia University expressly for the purpose of clearing the Patrix using emotional discharge. You are welcome to join in. Email nopatrix@gaiauniversity.org[146] to connect.

Double loops and forked tongues

Now is the time to think about experiential learning and unlearning that goes deep, that results in changes to the way we think and act and the value systems we use. These deep episodes of transition may arrive unexpectedly (or perhaps we find it hard to read the signs). They may be consciously invoked.

Very often they are preceded by a period of what is sometimes called "cognitive dissonance." This arises from a dawning realization that our current ways of thinking can no longer meet the existential demands of now (how to function well in a crazy world). Thus we need to let go of familiar constructs and risk all to find new ones with wider capacities.

Strong feelings are likely. Support systems are required!

Argyris and Schon have written effectively about this using the ideas of espoused theory. Espoused theory means the way we think we think about life, the world, and everything. Argyris and Schon compare it with theory in action (the way we act which may reveal that we are using a different theory than our espoused theory and this incongruence may well be invisible to us). They propose that we could use double loop learning to bring fresh congruence into our lives, so that espoused theory and theory in action increasingly match up. Read more here.[147]

[146] mailto:nopatrix@gaiauniversity.org
[147] http://www.aral.com.au/resources/argyris.html

Imagine a world in which everybody is skilled in and willing to engage in double loop learning/unlearning!

Transformative Learning

Transformative Learning is a field recently developed by progressive academics and is somewhat similar to the concept of unlearning that we use in Gaia University.

"Transformative learning is the process by which we call into question our taken for granted frames of reference (habits of mind or mindsets) to make them more inclusive, discriminating, open, and reflective so that they may generate beliefs and opinions that will prove more true or justified to guide action. Transformative learning often involves deep, powerful emotions, or beliefs and is evidenced in action."

Patricia Cranton writes:

"There are now several perspectives on the process of transformative learning–each of which may be relevant in different contexts.

- Critical reflection is one means by which we work through beliefs and assumptions. It helps to talk to others, not only exchanging opinions and ideas or receiving support and encouragement, but also engaging in discussions where alternatives are seriously considered.

- Connected and relational learning emphasizes connected knowing and relationships among learners rather than separate, isolated knowing.

- Social change or social action is described as a goal of transformative learning by some theorists. The theory has been applied to understanding how groups and organizations change, and it can be seen as an approach to worldviews on globalization and environmentalism.

- The extra-rational approach to transformative learning sees the learning as mediated by unconscious processes beyond the level of rational and conscious awareness. Insight, intuition, emotion, relationships, and personality may also play roles."

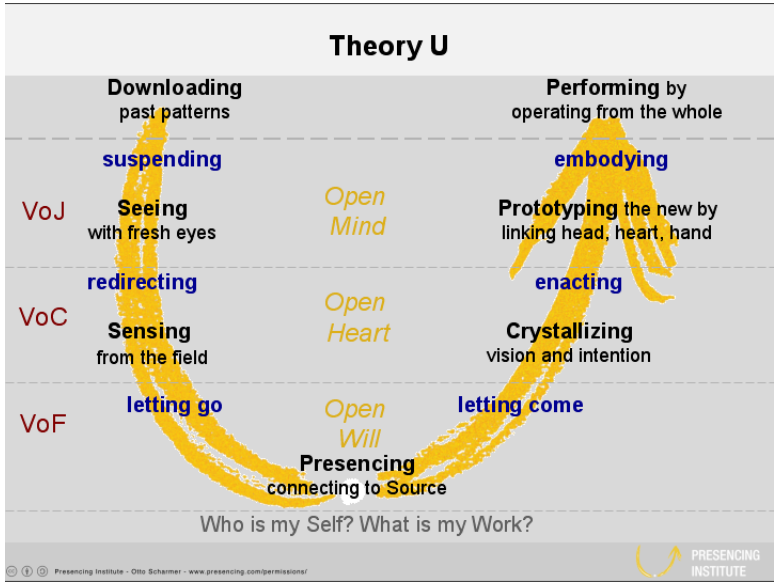
- read more here.[148]

Theory 'U' & Presencing

Finally, in this roundup of learning and unlearning models, take a look at Theory U, now housed with The Presencing Institute [here.] (https://www.presencing.com/theoryu) This way of thinking adds a lovely idea - that learning from experience can be substantially enhanced by learning from the future as it emerges…

That could mean noticing promising directions opening up on what you (and people you trust) consider to be the leading edge of the ecosocial rEvolution and having the courage to add your energy and intelligence to fully supporting the emergence of these projects even when it feels risky.

[148] http://www.transformativelearningtheory.org



Several Gaia U associates have made effective use of this model to describe their own pathway processes and the Presencing Institute offers (free) online courses.

Scholar Skills 4: Remembering and Reviewing

Remembering

Many of us struggle with remembering. We might (and might not!) manage to fix something in our short-term memories long enough to answer a quiz, pass a test, fulfill a shopping list. Yet, once a day or two goes past, the bulk of the data is lost and gone forever.

In many cases this "loss" is helpful. It saves us from archiving all manner of inconsequential information. In other cases, it's a

disaster because when we forget, we lose the possibility of using the data[149] for something constructive.

Constructive use includes, amongst other actions:

- deconstructing and critiquing the thinking over time,

- choosing to apply it in real or imagined situations, reflecting on the possible outcomes and more, all to see if it, the thinking, can be used with confidence.

and

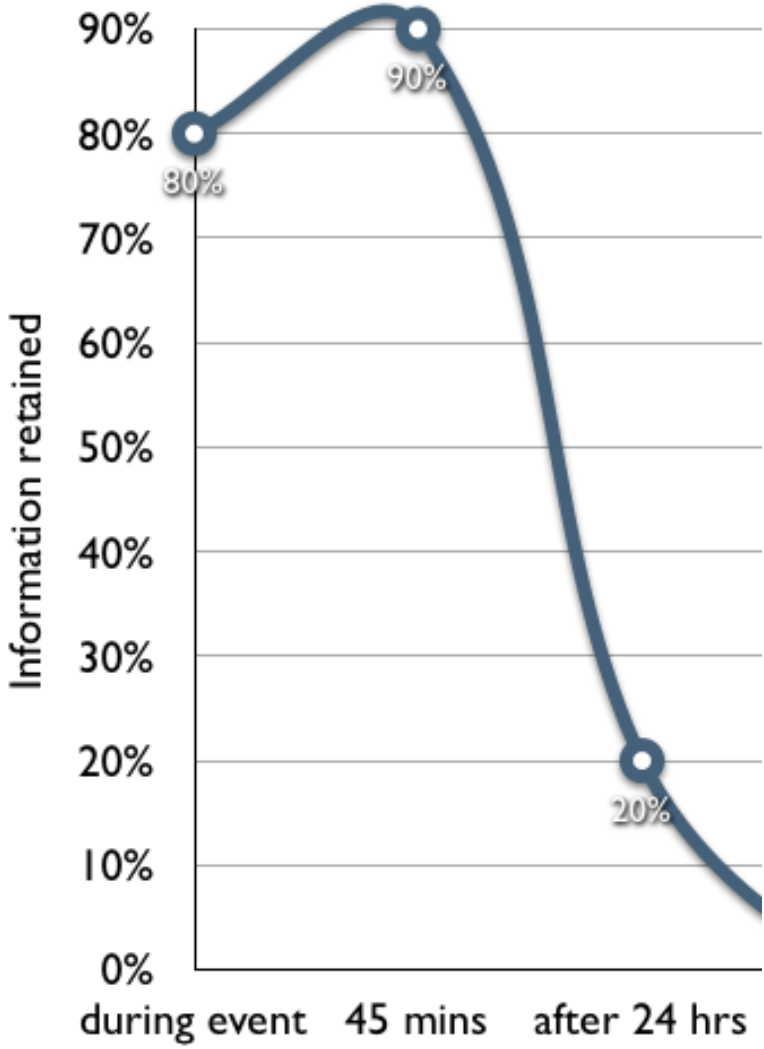
- we can synthesize it (mix it up) with other (perhaps not obviously connected) thinking from different fields and gain fresh insights, insights that might be of significance in resolving previously unsolvable problems of humanity.

These important uses rely on us remembering enough about a piece of thinking to be able to re-access it somehow. Once we forget it these valuable options disappear too.

Our capacity to recall can decay rapidly over a short time.

Tony Buzan, a principal inventor/advocate of mind-mapping, had a chart like this in his early books about mind-mapping.

[149]Data here means information, knowledge, thinking, concepts, ideas, constructs, feelings and more…


90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
Information retained
80%
90%
20%
during event
45 mins
after 24 hrs

The chart[150] proposes that we gather about 80% of the information at an event (lecture, reading session, storytelling, watching a video…) following which our recall can increase a little.

Then (shock and horror!) after 24 hours we can recall 20% or less of the content. Over time our recall degrades still further.

Anyone who has taught classes over several days (as in a Permaculture Design Course) knows this to be true. Ask the majority of your students what they remember about what you did together yesterday and, unless the work was anchored in the minds of the students through some form of active repetition, most people will look blank and struggle to say. These results confirm the chart above.

Collective and personal issues that result

This decay of recall capacity is devastating to all as it makes it especially hard to systematically grow a body of thinking and knowledge. At each stage, 7/10's of the work that went before might just as well have not been done.

Folks without good recall (that's most of us) drag on those who do remember well and may come to think badly about ourselves as un/learners. When this is the case, we easily sink into a state of limited engagement and the world loses the benefits of our participation. We might even come to feel hopelessly ineffective.

Thinking badly about ourselves as un/learners can be self-reinforcing and is deeply disempowering:

*Andrew writes: Because I used not to remember well I thought I was stupid, and that's also how other people experienced me. I gave up on thinking that I could ever understand the world, and I had very little sense that I could shape my own future.

Any idea that I could influence the future of human societies seemed preposterous even though I wanted to see a lot of change.

[150] A note about the charts

I became angry and felt trapped inside a fuzzy, incompetent mind. The chronic anger and frustration further clouded my capacity to think well, and that reinforced my crippling self-image. I WAS stupid, those other folks were right, and I had no right to think about the world being different…!

Later I discovered that this poor self-image of intelligence is common amongst working class people and their close relatives, the lower-middle classes (I am one of these). A mass of people who are convinced they have low intelligences; and who, therefore, give their power to others is an excellent resource for an oppressive culture!

Later, when I discovered (and practiced diligently) mind-mapping and systematic reviewing I was able to start on the long process of reclaiming my intelligences. Now I fully claim my right to change the world.*

Reviewing is key

We need to find good routes to reversing the 80% over 24 hours losses. The key is to have a light and engaging practice that allows us to actively and critically review the material. The next pages outline such a practice.

These show a general pattern of recall decay over time that changes due to review efforts. They are not drawn to be reliable in the sense that you could read off the value of y (% recall) anywhere on the x-axis (the timeline) and be confident that you had a meaningful result backed up by the data. They are there to tell a story and are not for analysis or interpolation.

The power of review

By reviewing the material at strategic points:

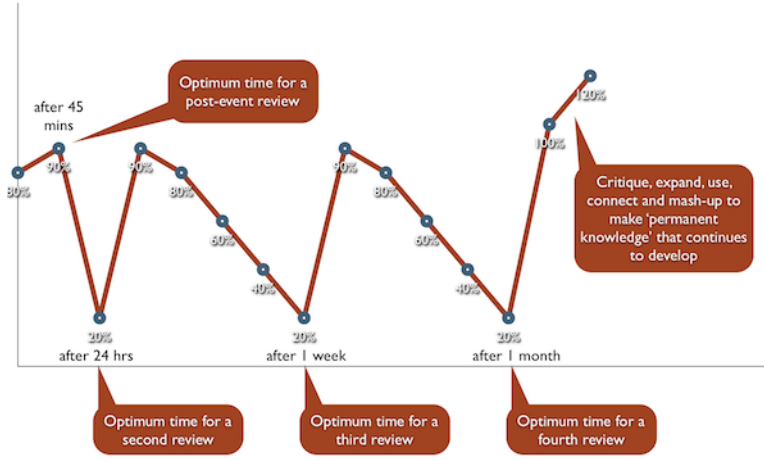
- just after the event (Review 1),
- after 24 hours (Review 2),
- after a week (Review 3)

and

- after a month (Review 4),

it turns out that we can very likely reverse the memory decline.

This chart shows that effect:



Better still, by fully engaging with the material through[151]:

- deconstruction, reconstruction,
- critique and expansion,
- synthesizing it with other material

and

- using the evaluated thinking to do stuff with…

…we can do more than reverse the decline. We can develop a more or less permanently accessible, flexible, growing field of wisdom

[151] You will recognize this as the ArCEA model of content engagement introduced in the previous element.

and knowing. The chart shows that happening around the fourth review.

Wow – this looks like a lot of work!

Indeed, it could be. And yet, if we use an ordered, creative process based on mind-mapping, a practiced, summarizing, key-word focused mind-mapping, we can slim this core task down to something surprisingly efficient AND immensely rewarding.

The reward is watching our own capacity to remember and use complex thinking develop. Often this capacity is beyond anything we imagined possible.

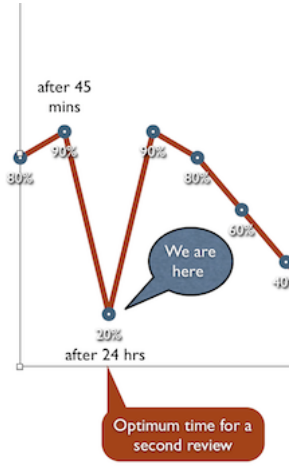
This is a cumulative enterprise as what we remember, and use becomes a scaffold for yet more advanced thinking.

We can watch ourselves go all the way to genius with only modest, structured effort.

First and second review

Post-event review and second review combined

Shortly after the "event" (within 24 hours is ideal), we take the original map (probably cobbled together in a hurry as we listened or watched) and reorganize it for increased simplicity and visual impact. Visual impact here means using color, symbols, and any other visual devices that make the map more memorable.



Now we do some critique. Does the content make sense? Does it stack-up with our own experience? Does it reflect biases we can detect or match with evidence we can find through web-searches or other sources…?

Next, we add extras (expand) to the content derived from our own thinking and the thinking of others to fill out any holes and expand the scope of the map.

Then it is time to design some experiments (one or two, practical and/or thought experiments) that allow us to test out the content in action.

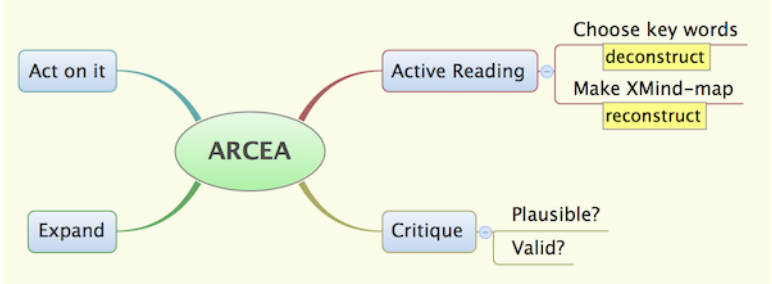
Finally, we can make links to show connections that we see.

Demonstration

Here are two maps of the ArCEA process. The first was taken down during a skim read. The second has been reorganized and expanded, 24 hours later, as if in the second review. Note that your maps could look quite different.

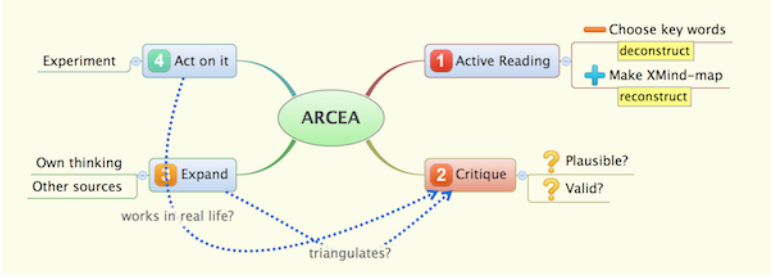
ArCEA stands for Active reading, Critique, Expand and Act.

First map



Second map

(more organized, expanded, more color, extra connections)



Third review

A week later, we do something entirely different. We set ourselves a challenge. We take a glance only at the thumbnail of the "completed" map. Using paper and pen, we see just how much of the "completed" pattern we can reproduce from memory.

Here is a thumbnail of our example map.



That's plenty of clues. So, without further looking, we go to paper and see how far we can get…

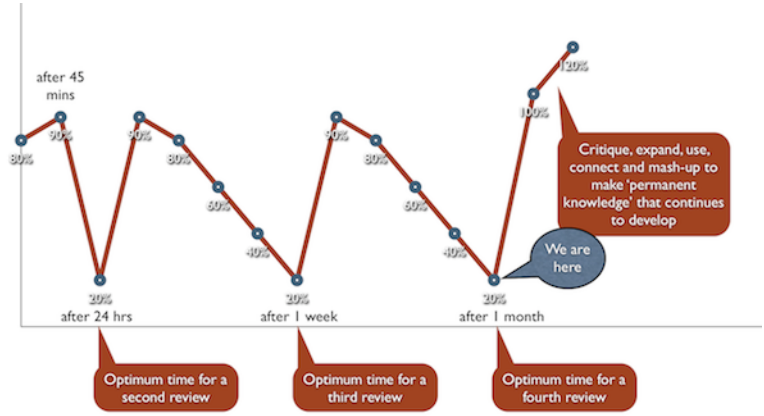
The point is to retrieve as much as we can from our minds (without struggle but with some good effort). Once we have come to the point where we can't easily recall anymore, it is time to look at the original and fill in anything we have missed.

That's it! The third review is done, content revised, and it's more firmly anchored in memory.

Fourth review

At this point (one month further on) we do a similar thumbnail reminder and hand-drawn extension exercise as we did for the third review. Start with just the thumbnail again… see what you can reproduce with good effort but no struggle and then refer to the original to fill out anything missing.





This lodges the content quite firmly in our minds. If it is relevant, and we invoke it through using it, the content becomes more or less permanently accessible. Bravo! Now our efforts in studying yield strong results as now we can remember well.

Meanwhile, we may well have additional thinking to add to the map, plus we might want to integrate it with other maps that cover some of the same territories. These are good things to do; although, the key to it is to summarize, condense, and summarize again.

Avoid large, complex maps

For memory development large, complex maps are a hindrance–not a help. The idea is that, if we have worked at remembering well, just writing ARCEA will be enough to invoke the entire map (or perhaps it's a neural network) that we have embedded in our minds to do with active reading, critical thinking, expanding content, and acting on it.

Organization

You can see that the review approach advocated here involves a level of organization around studying that you might not have

anticipated, plus it involves work. Well, changing the world is, we think, likely to take some effort. Here is a chance to practice!

Activities: Learning and Unlearning

Activity L&U/L1: Finished Kolb kites

Make your own hand-drawn version of the Kolb model and use it to map your own experiential learning profile. Do not worry about getting this 'right' as there is no right answer.

Activity L&U/L2: Add your ArCeA XM*ndMaps

Use XMind to reconstruct, critique and extend the theory pieces for the benefit of all.

Reminder – ArCeA stands for:

Ar = Active reading = deconstruct into keywords and phrases and then reconstruct into an XM*ndmap

Ce = Critical expansion or extension = looking at the content to see if you think it plausible and adding what you already know about the topic that was not included in the books

and

A = imagining (or actually doing) Action with the thinking (yours and the thinking in the books) to see how it might work in practice…

Activity 3: Your stories with commentaries

Use the Kolb model and others to review your life stories so far. How do these stories showcase your capacities as an experiential/action learner? Have you ever set up a project or situation

specifically so that you can learn/unlearn something by immersing yourself "in the field"? What went well with that, what was challenging and what would you do differently next time?

It is time to tell more of your life story. Choose some events that made a difference in your life and make some drafts of the storylines. Then see if you can use the learning and unlearning models to make some commentary about these stories.

For example, you might say, of a particular event, that you used a lot of Reflective Observation at this time and then eased out of this inward-looking phase by doing some tentative, toe-in-the-water experiments to see what might come next (Active Experimentation). Reflective observation and active experimentation are both terms from the Kolb model and, by analyzing your own pathway using this model you are showing your capacity for some very useful meta-reflection (as well as getting to use the Kolb concepts).

Or you might note that the change at another point in your life was so traumatic (chaotic) that you retreated to comfort zones for some weeks before being able to think well again. Maybe using Theory U would shed some light on this transition. That's more meta-reflection and another use of the models we are learning, including the Cynefin model.

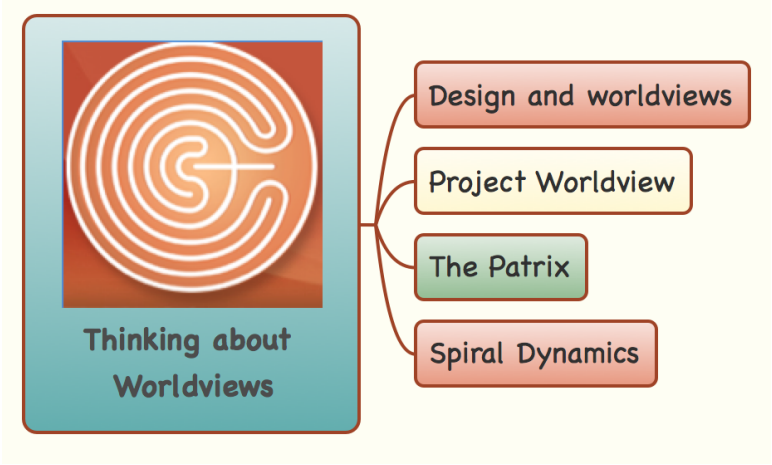
By this means you may gain some insights into your own learning and un/learning patterns AND test the theory/models to see if they are any use at all.

You can later re-use the commentary you make in here for your Life and Career Review (LCR). We love it when doing one thing leads to having half the next one done before you get there…it's called stacking functions!

Activity 4: And lastly, your reflections on working through this element....

Take a moment to consider your experience of this section and make a few notes to yourself.

Chapter 5: Thinking about Worldviews



Design and Worldviews

How "Worldview" is Significant to Design

Gaia U is rooted in permaculture design.

Permaculture arose (in the 1970s) from various impulses, one of which is explained by Bill Mollison in the classic 1994 permaculture video - "In Grave Danger of Falling Food". Search for this seminal video on Youtube.

In the video Bill explains that, following a period of being a 1960's activist engaged in intense protest against the policies and actions of various governments, he walked away from society in disgust, "cut

a hole in the bush," and lived there intending to be a self-sufficient, an active non-participant in mainstream culture. For more, see this pithy and fascinating interview with Bill here.[152]

However, it wasn't long before he came to a conclusion that "they" wouldn't notice his withdrawal and that "they" would also "walk all over" anyone whose worldview did not match their own.

Therefore, he decided that he had a responsibility to come back out to fight. Although, this time, his chosen weapons were to be focused on **designing** into being what he **did want** for human societies instead of protesting against what he did not want.

In taking this constructivist orientation, Bill may have been influenced by an earlier design oriented world-changer, Buckminster Fuller (d.1983), who is often quoted as saying, *"You never change things by fighting the existing reality. To change something, build (we'd say "design and build") a new model that makes the existing model obsolete."*

This shift from protest towards constructive engagement is a significant piece of thinking in a permaculture worldview that also includes the understanding that a) humans are an inseparable part of nature and that b) "everything is connected."

Therefore, when we are engaged in permaculture **design** (if we've truly "got it") we will be designing with these key ideas in mind. These ideas (and beliefs, principles and attitudes), plus others, is a "worldview," a complex, layered lens through which we make meaning of the world and our actions in it.

Used with this worldview, **design** is a constructive tool for bringing a world-wide ecosocial future closer by the minute.

However, used with a different worldview, for example a worldview that includes memes such as "poor people are lazy and responsible for their own troubles," **design** could just as well be used to conjure up an effective strategy for cutting public funding

[152] http://www.context.org/iclib/ic28/mollison/

for education (or turning off water supplies) in collapsed, post-industrial, inner-city areas.

Thus our "worldview" is critical to the direction and intention of design.

What might we gain from Worldview Literacy?

Despite the importance of worldview very few of us have had the opportunity to become "literate" around our own worldview and that of others.

This element is designed to remedy that.

Literacy, in this case, means *at least* the ability to explore our worldview terrain systematically, to make better sense of it and, at more advanced levels, to be able to dance with the worldview notion so that we can gain the following significant advantages:

- By understanding the processes through which worldviews come about and develop over time we may well be able to map out **routes and strategies (un/learning?) for conscious future developments** (Spiral dynamics[153] is one flawed but interesting and relevant construction we use in Gaia U that seeks to do this).

- As the world we live in is very much shaped by the relative dominance/subordination of various worldviews, we might (very likely[154]) be able to work out how to **turn the volume down on some and turn it up on other worldviews**. We would do so in order to shift the humanly mediated world of societies and cultures toward increased ecological regeneration and social justice (the ecosocial goals of Gaia U).

[153] http://spiraldynamics.org

[154] We can certainly turn down/turn off anomalous pieces of our own worldview and, to a lesser extent, the worldview of other people in our networks. These "act local" engagements are an opening to us for understanding how this "worldview" rewriting process could work on a large scale. One key method for this work is the previously mentioned Re-evaluation Counseling (www.rc.org).

And we will also likely be able to:

- analyze (our own and other peoples') worldviews for **coherence and integrity** (meaning that all the pieces[155] are more or less consistent with and do not contradict each other too much),

- check for **completeness**, that all the pieces that are necessary are present (worldviews with missing pieces are unstable. Unstable does not necessarily mean "bad." It may well mean "on the cusp of paradigm shift." However, should we be able to identify incompleteness, we would also be able to fill in the gaps more rapidly thus risking a little less chaos),

- evaluate for **compatibility** (for people working together, for relationships, for connections between sub-cultures, for the building of epistemic community…),

- synthesize **integrative common ground** approaches for working together in situations of apparently low worldview compatibility (finding common ground and strategies of alignment in unpromising circumstances),

and

- search for worldview pieces (our own and those belonging to others) that are **unconscious** and that, once we know they are there, we'd like to modify or remove (for example, oppressions and internalized oppressions. The Patrix thinking included later can help with this).

Many social science academics also dislike the term as it is popularly and indiscriminately used (especially in web-based communities) to mean any iconic artifact that had the potential to spread into a culture.

[155]"pieces of worldviews" – the term "meme" is in use (since Richard Dawkins coined the term in *The Selfish Gene,* 1976 – see here for the 30th anniversary edition) as a way of describing those pieces of culture that make up a worldview. The concept of a meme is deliberately analogous to the fact of a gene, but, unlike a gene that is the proven mechanism by which genetic material is repeated through generations, the existence of memes is not (yet) proven by science.

However the meme concept is making sense for many people (it passes the plausibility test for some of us) and, depending on your worldview, you'd be happy to use it (although careful about how far you stretch the gene/meme analogy), or you'd reject its use and declare it pseudoscience.

Andrew, the author of this piece, is in the "use it carefully" camp and likes to imagine an order that goes: theme, meme, and seme. Here, theme is the meta level (e.g., sexism), meme is the middle level (e.g., women are less intelligent than men – and then there are a bunch more memes at this level) and seme (from semantic) is the level of actions and words on the ground. An example of this is: "Hi Guys!" used to address a mixed gender group – and there are many more semes. You'll need to make up your own mind. See this website[156] for a short, elegant introduction to memetics.

Add-ons for deeper analysis

Quick-start for The Patrix…

Spotting and eliminating oppressions and internalized oppressions needs special attention. In Gaia U we call the matrix of oppressions (also called the matrix of domination) "The Patrix"[157] (the patriarchal matrix) in recognition of the largely patriarchal themes, memes, and semes that continue to support and deliver this pervasive and dysfunctional system.

Wherever The Patrix is in operation (most everywhere, most always) its effect is to severely distort reality such that large parts of our many human cultures on the planet are addicted to both ecodestruction and social injustice.

[156] http://memetics.chielens.net/memetics/index.html

[157] Other terms could be MoD (Matrix of Domination – look up Patricia Hill Collins) and the Kyriarchy. Kyriarchy is a term coined by Elisabeth Schussler Fiorenza in her 2001 book, *Wisdom Ways: Introducing Feminist Biblical Interpretation* and is defined as the social system that keeps all intersecting oppressions in place. See this link for a Kyriarchy 101 page.

We describe The Patrix and strategies for its elimination more fully later in this element.

A Worldview about Worldviews

Now before we dive into the worldview topic in detail let us acknowledge right away that the primary proposal of this element – **the conscious interrogation and development of worldviews as being both positive and possible** - is based in a worldview itself.

It is a worldview that seeks ecosocial goals. In part, these are sought through consciously raising self and cultural awareness and looking to eliminate memes of eco-destruction and social injustice.

Some other worldviews would contend that conscious attention to the quality/coherence of worldviews is not a valid and/or practical activity.

Some worldviews, for example, contain memes that maintain that higher authorities than us, possibly supernatural authorities, have given us a worldview map and our role is to enact it as prescribed and therefore it is none of our business to tinker with the "given" blueprint.

Other worldviews would maintain that any attempt to catalog or categorize worldviews thoroughly is impractical because of the uniqueness of every individual human on the planet. They would claim the project is bound to fail as we don't have the capacity to process the complexity of the results without putting people into boxes…

…and that activity, putting people into boxes is, according to these particular worldviews (centered on a relativistic pluralism that proposes that an infinite number of worldviews are equally valid), illegitimate.

You will have your own opinion about all this, depending on your worldview. Let's explore that!

We choose to use "The Patrix" (so far) as it is easy to say and understand, whereas kyriatrix is less of a sound-bite and, as Andrew likes to emphasize, "The Patrix" reminds men especially that they have a lot of essential work to do in letting go of their power and privilege whilst seeking their own liberation from oppression. This parallels the idea that it is white people who, in the theme of racism, are the oppressors who have to unlearn the false identity of being white as much as (and if not more) than people of color need to unlearn their internalized oppression. See Thandeka's 2001 book *Learning to be White* for more on the problems of white identity.

Project Worldview

Project Worldview-a warning...

To kickstart building our worldview literacy capacities we'll be using the comprehensive Project Worldview website (the link comes later) but before you go there, some words of warning and a suggested approach...

The warning:

Since we started to use this site six years ago, the manager/owner (Stephen P. Cook) has worked hard to redesign it for ease of use. It is a site handwritten in html and has a very basic aesthetic. It contains a considerable amount of information including links to hundreds of back-up documents.

Therefore, you will need to approach it with a designed attitude that allows you to learn enough of the site and, meanwhile, let go of (unlearn) any demands that it should be more "user-friendly."

Go there for frequent short visits to start with until you get the hang of its structure. The Project Worldview blog posts show how to use the constructs to analyze current affairs.

But, before you go there, try the "suggested activity" later in this section…

Project Worldview-Intentions and Meta-Themes

The intended purpose of the Project Worldview site (developing literacy around worldviews) and the breadth, depth, and variety of the content (of which there is almost no end) are great resources.

The site development is modestly active (see the blog called Worldview Watch[158] to get some idea of how a system like this can be used to make thoughtful analyses of current events…). Whilst it seems as if it is a one man and his dog project, the man has good enough credentials to satisfy Andrew (who notes Stephen's earlier work with Donella Meadows,[159], his exhaustive inclusion of papers that must surely offend his own worldview, and the unusual levels of transparency on the site).

Important: do go and see the critiques of his site, published on the project site,[160]. Many of the critique angles are FAQ's arising from readings by Gaia U associates and others in the past and, as such, you get to see all manner of critiquing that probably extends beyond the questions you might have asked. This is a rare opportunity to see a collective critique in action, and it might well extend your capacities when working at ArCEA.

The four meta-themes/aspects of a Worldview

Stephen P. Cook, the project author, has systematized the worldview concept for us so that we can engage with it (rather than get lost in confusion) and his four aspects of worldviews (indicated by the European playing card symbols) is a very helpful pattern.

[158] http://www.projectworldview.org/worldviewwatch.htm
[159] http://donellameadows.org
[160] http://www.projectworldview.org/pioneersornaive.htm

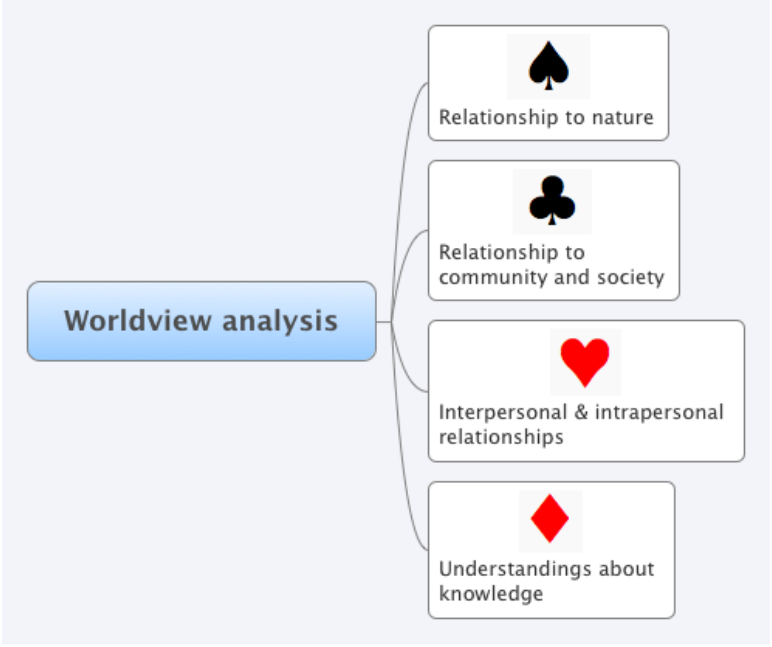
The four aspects of worldviews (with Andrew's word associations highlighted in yellow):

Card symbol	My word association	Description
	Spade = Earthy	an individual's relationship to the natural world and how his or her support of, or participation in, activities (including daily lifestyle, earning a livelihood, etc.) that impact nature.
	Clubs = Cluster/Group	an individual's relationship to groups of other individuals--including the whole society he or she is part of--and participation in activities (including earning a livelihood) associated with these groups.
	Hearts = Relationships	an individual's interaction with another individual (or with self) with respect to the underlying driving motivation and the extent to which thinking, feeling, and doing--and behaviors associated with these--are under control.
	Diamonds = Guiding Star	involves how an individual relates to knowledge, including the basis for knowledge, the orientation adopted and tools used for acquiring more knowledge.

Suggested Activity and Project Worldview Website

Using the four playing card meta themes, or aspects, and, before going to the Project Worldview website, think about how you would characterize yourself in these areas and make some modest notes to refer to later. See if these correlate to what you turn up after exploring the site.

You can use this XMindMap if it is helpful (click this link[161] to go to original)...



The Project Worldview website

The Patrix

A missing (and very big yet removable) layer

What is missing from the Project Worldview system is any systematic attention to the deep threads of oppression and internalized oppression that is shot through the fabric of our cultures.

[161] http://www.xmind.net/m/5kQU/

Pluralistic relativism

One possible reason for this is that the flexible, open attitude of the author (an openness and flexibility of which we generally approve) could easily slip over a border into something called "pluralistic relativism."

This is a syndrome that, at its most unhelpful, insists that we cannot make judgments about how appropriate is another person's or culture's value and belief systems, that every set of values and beliefs is just as valid as any other worldview.

From the point of view of pluralistic relativism, for example, it is not legitimate to critique USA culture for its rapidly growing wealth gap between the rich and the poor because it is entirely appropriate that this should happen given the cultures' strong belief in individual opportunity. This is a belief that says that everybody has the chance to make it big in the society, and if they don't it is their fault for being lazy and stupid.

(See this video for income inequality data:http://youtu.be/QPKKQnijnsM[162])

Or, in another example, pluralistic relativism makes it illegitimate to critique cultures that mutilate the genitals of girls and boys without their consent on the grounds that these practices are culturally appropriate and, therefore, none of our business.

See this site for people unafraid to speak out against genital mutilation in the USA: http://www.intactamerica.org/[163]

Please note that this critique does NOT suggest the Project Worldview authors approve of either of the two "patterns" above (income inequality and the genital mutilation of babies), rather that along with many of us, they may be wary of being seen to be "judgmental" and/or culturally inappropriate.

[162] http://youtu.be/QPKKQnijnsM
[163] http://www.intactamerica.org

Discernment

In Gaia University we propose that it is important to step out beyond pluralistic relativism and notice that many a value and belief that go to make up the systems we call worldviews (including our own) arise from deep, unresolved patterns of distress and lead to inhuman (oppressive) behaviors.

Thus an essential part of our work is to learn how to discern when these patterns of distress are distorting the inherently good, loving, cooperative and connected (to each other and all life) nature of human beings, and to find ways to enable ourselves and others to heal from these oppressive distresses.

Discerning The Patrix

This section seeks to advance this essential work firstly by identifying the matrix of oppression/internalized oppression, named The Patrix by Gaia U, and secondly by proposing a strategy for progressively eliminating The Patrix over time.

Similar concepts to the Patrix exist in the "conventional" Academy. See, for example, Patricia Hill Collins on The Matrix of Domination[164] and, for a version in civil society see the Discrimination Portal in Wikipedia.[165]

A Key Understanding: The Patrix CAN be Removed

Knowing that attenuating The Patrix (we can turn it down to start with) and eliminating it (we can finally turn it off altogether) are possible, and, that willing people can, with appropriate effort and method, re-emerge towards their full, oppression-free humanity, is crucially important.

Why?

[164] http://www.hartford-hwp.com/archives/45a/index-cf.html
[165] https://en.wikipedia.org/wiki/Portal:Discrimination

Because this knowledge allows a person to more readily acknowledge the influence of The Patrix in their realistic appraisal of the current situation because they can have confidence that this **is not inevitable**, that this complex tangle of oppression and internalized oppression **does not need to dominate** the design of our societies.

Elimination of The Patrix is, in our view, an essential complement[166] to the design and implementation of the ecosocially regenerative societies we want to have ready to replace the current, collapsing, oppressive destructo-cultures.

Normalized Oppression

A core issue here is that the normalized (and therefore almost invisible) threads of The Patrix can easily and inadvertently be carried forward into new designs where they lurk unnoticed until, over time, they resurface despite the best intentions of the project designers and operators. The resurgence of Fascism in our democracies is a great example of this effect.

Re-evaluation Counseling experience shows that significant strides towards turning down the volume of a Patrix theme (e.g., sexism) can be made on the individual and group level, with appropriate attention and method, over timescales around two to five years. Complete elimination is a lifelong task (worthwhile, nonetheless).

The Patrix Returns

A micro-scale example of Patrix Return

Both Liora and Andrew (Gaia U Founders), long-term participant/observers in the intentional community/eco-village movement,

[166]Complement – it is not necessary to eliminate The Patrix entirely before going forward. Many of its more subtle themes/memes/semes only become visible when we work and think together over long periods of time. Instead, what is necessary is that we continually attest to its presence and acknowledge its power of reproduction so that we sustain the efforts to eliminate it in the long term.

can attest to the fact that many of these projects, designed with every intention to transcend The Patrix and to leave it behind, are prone to unconsciously re-enacting these deeply dysfunctional ways of thinking as time goes on.

Unless projects maintain an energetic program of focus and action on *patrix-busting* The Patrix returns, often in sly, hard-to-see, and hard-to-eradicate forms.

Other significant participant/observers note the same syndrome (see the paper *Why I Now Believe Consensus-with-Unanimity Causes Conflict* by Diane Leaf Christian (click to download)).

Thus many of our most progressive 'demonstrations' of intentionally ecosocial communities fail, in the long-term, to demonstrate much of deep significance in regard to patrix-free social and economic themes.

Macro-scale example of Patrix Return

On a more extensive and much more disastrous scale, The Patrix morphs itself and surfaces in new, disguised forms that are responsible for the systematic abuse of whole communities.

A prime example of The Patrix undergoing reinvention, reinvigoration and disguise are now well documented in *The New Jim Crow – Mass Incarceration in the Age of Colorblindness,* by Michelle Alexander (2012).

The New Jim Crow documents how racism, a primary theme in The Patrix, and invented to justify slavery 500 years ago (along with "white" as an identity), morphs via the segregationist Jim Crow policies of "equal but separate" in the last century to the mass incarceration policies that arise from the so-called "war on drugs."

Alexander shows, through careful analysis of the data, that the "war on drugs" is, in the USA at least, currently a war on (young) black and brown men, and that the mass incarceration and judicial supervision (probations and parole) that blight the lives of up to 50%

of the African American[^foot62] men living in the ghettos of USA cities, destroys (deliberately?) the coherence of their communities. Thus diminishing both the quality of life for all ghetto inhabitants and, crucially, their ability to resist oppression and reconstruct their communities.

A more recent ZNet post from Cynthia Peters proposes that whilst racism has black (and brown) men locked up, it has black women evicted. See it here.[167]

Miners' Canaries

A further twist to the plot is the proposal that whatever happens to African American (and Latino) people in the USA right now is an indicator of what is in store for white working-class and lower-middle class people too, should they ever get too uppity. See *The Miner's Canary: Enlisting Race, Resisting Power, Transforming Democracy* by Lani Guinier and Gerald Torres (2002).

This is because the "war on drugs" has allowed governments to extensively militarize police forces (and, in Mexico, make direct use of the military) in the name of this (ineffective, deadly, and costly) war, thereby enabling the rapid deployment of shock and awe armed forces on the ground wherever there is "trouble."

What we are witnessing (and experiencing) here is The Patrix demonstrating its extraordinary capacity to reassert itself (the racism theme) through new (and seemingly justifiable until examined) forms.

Conclusion

Hence we all need to be alert Patrix Spotters and active Patrix Busters (starting with our own Patrix patterns) in our quest to bring ecosocially regenerative cultures to the fore.

[167] https://zcomm.org/sendpress/eyJpZCI6OTY0NDkzLCJ2aWV3IjoiZW1haWwifQ/

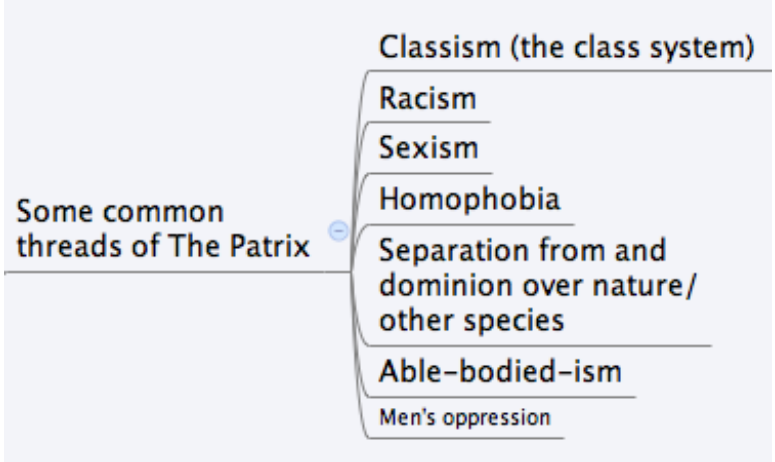
[^foot62] Lest we should buy into the myth, actively perpetuated by the white-owned media, that black men are inherently more drug connected than white men, Alexander reveals the data that shows us that white men are more likely to be dealing and handling illegal drugs than black men. And that, therefore, the conclusion can only be that the "war on drugs" is racism reinvented.

The Patrix Revealed

Warning

Restimulation possibilities (that is, you might get triggered and upset) lie ahead. Any exploration of The Patrix has the potential to be upsetting. For this reason, the descriptions of the themes (oppressions) are short and superficial. Meanwhile, having buddies on hand for think and listens to process any feelings that are triggered is also effective.

A Seven-thread Patrix



The graphic above shows some of the most common themes (oppressions) in the assembly/system we call The Patrix. There are several more.

A brief description of each of these is as follows:

Classism: Probably (although not certainly) the senior and most ancient thread (came into being first, possibly around 15,000 years Before Present – BP). What it does is divide people in society into a range of social/economic classes, each of which has involuntary different access to wealth/poverty and privilege/prohibitions.

These differences in access are generally intergenerational, meaning a person identified with a particular class is likely to have ancestors and descendants with a similar class background. Inherited wealth adds more power to these intergenerational effects.

It is held in place partially by the myth that people with wealth deserve their hoards because of their greater effort, intelligence, worthiness, and, for post-Calvinist Protestants, closeness to God.

Racism: Invented (as a concept) as a means to separate African people bonded in slavery in the Americas from their allies amongst the indentured landless classes (Irish people escaping from famine were a significant group). Conditions for the indentured landless were deliberately and fractionally differentiated from those of Africans held in slavery so that they, the landless would learn to think of themselves as superior enough to become agents of oppression on behalf of the owning classes. Racism was/is also used to justify European colonization of the Americas through displacing indigenous populations. Eduardo Galeano's[168] classic book *The Open Veins of Latin America* contains many details.

Sexism: Likely as old as classism (some say older) - acts on a collection of memes and semes that gender determines intelligence, capacity for leadership, rights to property, and self-determination. It insists that males are superior in all these attributes (and more)

[168] https://en.wikipedia.org/wiki/Eduardo_Galeano

to females.

Homophobia: is a range of negative attitudes and feelings toward homosexuality or people who are identified or perceived as being lesbian, gay, bisexual, transgender, or Queer (LGBTQ). Evident since at least Biblical times.

Separation from and dominion over nature/other species: in which humans consider nature and other species less deserving of rights than humans. Noticeable with the onset of agriculture 15000 years BP? It was codified in the Christian Bible.

Able-bodied-ism: directed at people with disabilities and supposing that they are mentally impaired, undeserving of self-determination, are asexual, and that they do not suffer from the physical isolation they experience due to lack of access.

Men's oppression: included in a smaller font to indicate that this oppression (in which one effect is that boys and young men are systematically prepared for the military by separating them from their capacity for compassion) is not yet well enough acknowledged, especially when we consider that it is heavily implicated in warfare. Not acknowledging this oppression is a Patrix effect.

What the Patrix does (intentionally?)

What The Patrix does best is artificially separate[169] individuals and groups of people one from the other (and people from the rest of life) in order to weaken them against oppression and, indeed, set them against each other creating conflicts that divert their attention from the more substantial aggression. Divide and rule[170] is a deliberate application of this effect).

[169] Artificially separate – one primary strategy of the Patrix is to commandeer and co-opt human intelligences (especially in the academic world and the world of public intellectuals) with a view to "proving" that the separatist assumptions of the Patrix are not irrational constructions generated by its own warped logic, but are based on real differences. See, for example, this Wikipedia overview of "scientific racism."

[170] https://en.wikipedia.org/wiki/Divide_and_rule

Much of the prolonged isolation and absence of community experienced by modern people is a result of the refined systems of separation that arise from The Patrix.

This understanding leads to a possibly contentious proposal that building close community is more to do with eliminating the dysfunctional social patterns that keep us isolated from each other than it is to do with building ecovillages (that will later manifest The Patrix – also known as {aka} the Same Sh*t, Different Day[171] effect).

Intersectionality

Each one of us lives at a unique intersection within the Patrix.

Every one, (and more) of the oppressions or themes listed above impacts our worldview and our experience of being in the world: no-one is immune.

This concept of intersectionality is relatively recent (within 20 years or so), and it is a critical breakthrough as it focuses our attention on the understanding that all oppressions, not single issues, need resolving for humans to re-emerge fully.

And the way the themes juxtapose, the way they synergize with each other, means each theme/meme plays louder or softer for each one of us.

For example, a physically challenged working-class person is likely to experience some aspects of their challenge in a different and louder way from a physically challenged person from a coordinator class background. To illustrate this consider the two following (true-life) vignettes:

X's situation– a working-class man, an unpowered wheelchair user, living on social security benefits in the UK, more or less

[171] http://youngfemalescientist.blogspot.mx/2011/03/same-shit-different-day.html

confined to the small, rented, terraced (common walls with the dwellings either side) townhouse.

Space inside the house is tight and the wheelchair barely passes through the narrow doorways from room to room. To get out into the street involves negotiating two steps down. To get upstairs to bed involves X's wife pushing him from behind as he uses a stick for balance and the handrail to pull on. It takes them 20 minutes to do this maneuver.

Stair lifts, ramps, and a powered wheelchair are beyond their budget.

Y's situation– a coordinator class[172] woman, a powered wheelchair user, lives in a spacious suburban house which has been fitted with an internal elevator for moving between floors.

Y can operate both the wheelchair and the elevator herself. Doorways have been widened and she can drive the wheelchair between rooms. Access to outdoors is quite possible without assistance, and she can, with some difficulty, transfer into the car (which has been adapted for her use) and therefore travel across town and beyond.

Now, the point here is not to compare the psychological and social challenges that each one of these two good people faces as a result of their overall challenge (including the fallout of able-bodied-ism). Instead to note that, because of the intersection of their disability with their class backgrounds and the associated access to wealth, their capacities to mediate some of the practical aspects of their mobility and lifestyle are quite different.

This is a simple example of how the particular intersection, in this case of class and physical challenge, is unique for each person and

[172] *Coordinator class*– a term coined by Michael Albert of the Z-Net Community to describe the layer of professional people who fulfill the coordination, management, and knowledge-making roles that control a working class in a society run to meet the interests of an owning class.

how one issue might be either intensified or diminished by the presence of another.

Michael Albert is from the USA and is it is unusual to come across a USA'er with such a good grasp of the class system. This is because the culture of the USA does its best to eradicate thoughtful discussion and analysis of the class system by actively maintaining the myth that, since the Founding, the USA is a class-free culture (or, at least, a homogenous, middle-class culture).

Australian society seeks to commit the same pretense. However, it is increasingly obvious that, even if the class system was somehow diminished (compared to the old European aristocratic culture) around the Founding times, it has now re-emerged with a vengeance.

This phenomenon is another example of the capacity for re-emergence of The Patrix (despite espoused intentions) unless it is thoroughly, effectively and continuously eliminated as an oppression, and internalized oppression).

Internalized Oppression

This term deserves additional explanation. Over time an oppressed group is liable to come to believe the untruths their oppressors tell about them and often direct at them.

For example, Patricia Hill Collins in her landmark book *Black Feminist Thought* describes how, as she was growing up into young adulthood:

"my world grew larger, but I felt I was growing smaller. I tried to disappear into myself to deflect the painful, daily assaults designed to teach me that being a black, working-class woman made me lesser than those who were not. And as I felt smaller, I became quieter and eventually was virtually silenced."

Internalized oppression is very useful to The Patrix. Once a community of people has been thus infected, they can (unwittingly) maintain the oppressive messages themselves: thereby relieving the original oppressors from the need to make much additional effort to continue the effect. Another common response to internalized oppression is for the oppressed to aspire to be admitted to the oppressor group.

Augusto Boal, creator of the Theatre of the Oppressed, coined the term "The Cop in the Head" to describe this other-oppression transformed to self-oppression and had this to say:

"There are many people who dare not participate in a strike or other political action. Why? Because they have cops in their heads. They have internalized their oppressions."

And, he goes on to add:

"The cops are in their heads, but the headquarters of these cops are in the external reality. It is necessary to locate both the cops and their headquarters."

The Drama Review, Vol 34, No. 3, Fall 1990: The MIT Press ISSN: 10542043, E-ISSN: 15314715

The myth of people as exclusively perpetrators and/or victims

Once we begin to uncover the influence of The Patrix in our own lives and in the lives of others, it becomes clear that each of us carries oppressor memes (and likely acts them out towards other people); internalized oppression memes (we act these out on ourselves); and each of us experiences memes of oppression (that is, other people act them out on us).

This is a contrary and more complex view to the more common, simplistic understanding that some people are exclusively oppressors and others are solely victims.

The 1% myth (an either/or compared to both/and issue)

For example the current popular view that 1% of the population is responsible for visiting The Patrix on the 99% remaining is one example of the simplistic (and thus not very useful) blaming approach (there is, for example, no recognition of the role of the 20% Coordinator Class nor any recognition of the effects of internalized oppression).

Once we understand that this polarization of people into perpetrators **or** victims is an inadequate analysis (and, instead understand that everyone carries **both** oppressor **and** oppressed patterns) we have removed one of the most significant impediments to eliminating The Patrix.

The "**either** we are an oppressor **or** we are oppressed" framing makes it easy to think of The Patrix as the sole responsibility of the oppressors.

The framing that "we are carrying **both** oppressor **and** oppressed patterns" (albeit to very different degrees for each person in the two roles) now opens the possibility that we all have a common interest in eliminating The Patrix.

Using this framing, we can now make sense of the idea that the prison guard who oppresses the prisoner is also trapped in that role by an oppressive system that denies the guard full-access to their intelligent humanity. That, therefore, both the guard and the prisoner would benefit from a liberation process.

Everyone is affected

With big hearts, we can extend this compassion to notice that the 1% who operate oppressor patterns (directly and more often through the agency of the 20% coordinator class) towards the 80%, are themselves unable to access their full humanity. The system requires them to be ruthlessly indifferent to the needs of the people

they exploit. Ruthless indifference is an anti-human pattern that damages all involved.

The 21% (the 1% + 21%) may not know this, but they too will benefit greatly from a culture that does not drag its feet to the dirge of The Patrix.

From this framing, we can see that eliminating oppression is not merely an altruistic act of charity that benefits only the people targeted by the oppression but an essential step in dissolving The Patrix for ourselves, for everyone, and for all life on the planet.

To put it another way, from the standpoint of our oppressor role, we might think we somehow gain a worthwhile advantage and, should we eliminate the oppression, we will forfeit these "benefits."

This latter fear is, for example, common amongst men with regard to sexism (the oppression of women). Many men think that eliminating sexism (if they think about it at all) will cause them disadvantage, compared to how things are now. They are, therefore, reluctant to "get with the program."

Therefore my liberation comes first

However, according to the strategy for patrix-busting we propose in Gaia U, men, for example, are encouraged to focus on their own liberation from men's oppression in the first place. The primary issue for men is the need to reconnect with and express their feelings, a facility that is commonly and deliberately disabled in boys/men from an early age.

By doing this work (learning to feel feelings again and then noticing how men have been separated from other people) men can very soon and very readily come to see that sexism has been deeply limiting for them as well. How we men can ever imagine that being the primary vectors of sexism, a pattern that is almost guaranteed to ensure that women will, sooner or later, come to view us with deep suspicion and resentment, is somehow of benefit to us, is a

testament to the capacity of The Patrix to shut down our abilities to a) notice and b) think).

A common interest

Thus, according to the understanding promoted here, that no-one can be assigned a clean role on either side of a perpetrator/victim divide, we can all notice that we are in unity, as survivors of The Patrix. Further, we all have a deep, shared interest in its ultimate (and imminent) defeat.

Patrix Busting-a concrete and effective strategy

In our work together up until now, you will remember that we have been advocating for Re-evaluation Counseling (RC). A prime purpose of RC is to help us re-access our flexible intelligences by eliminating old distresses.

Now the advocacy goes a step further. We propose RC as a process for eliminating The Patrix. We do this in the knowledge that other candidate modalities exist.

Examples (from the many) include: Non-Violent Communication, various forms of spirituality based on meditation, healing, affirmations, Transactional Analysis, The Mankind Project, Landmark Forum, Cognitive Therapy, Forum, somatic (body) based approaches like Feldenkrais Method, Alexander Technique, Contact Improv and more…)

Each of these has their distinct value and power, yet none are as consciously focused on, or have methods for, world-change through the elimination of oppression and internalized oppression.

And, meanwhile, RC is not exclusive in that RC practitioners can work with all of the above, gaining extra effect in the process from their capacity to discharge.

So, to recap Re-evaluation Counseling (RC):

*Re-evaluation Counseling is a process whereby people of all ages and of all backgrounds can learn how to exchange effective help with each other in order to free themselves from the effects of past distress experiences.

Re-evaluation Counseling theory provides a model of what a human being can be like in the area of his/her interaction with other human beings and his/her environment. The theory assumes that everyone is born with tremendous intellectual potential, natural zest, and lovingness, but that these qualities have become blocked and obscured in adults as the result of accumulated distress experiences (fear, hurt, loss, pain, anger, embarrassment, etc.) which begin early in our lives.

Any young person would recover from such distress spontaneously by use of the natural process of emotional discharge (crying, trembling, raging, laughing, etc.). However, this natural process is usually interfered with by well-meaning people ("Don't cry," "Be a big boy," etc.) who erroneously equate the emotional discharge (the healing of the hurt) with the hurt itself.

When adequate emotional discharge can take place, the person is freed from the rigid pattern of behavior and feeling left by the hurt. The basic loving, cooperative, intelligent, and zestful nature is then free to operate. Such a person will tend to be more effective in looking out for his or her own interests and the interests of others, and will be more capable of acting successfully against injustice.

In recovering and using the natural discharge process, two people take turns counseling and being counseled. The one acting as the counselor listens, draws the other out and permits, encourages, and assists emotional discharge. The one acting as client talks and discharges and re-evaluates. With experience and increased confidence and trust in each other, the process works better and better.*

Simple/Complex Paradox

RC is an example of the simple/complex paradox. The method is, in essence, simple. The think and listen approach we use for webinars and for support groups, which is derived from RC, demonstrates this.

It is not difficult to learn how to do it and yet it is (we may have different experiences of this) potent and effective.

By adding several layers of additional "method," each of which is simple in its own right, the whole process is capable of becoming a complex, adaptive system capable of infinite permutations.

These methods include:

- a capacity for the "thinker" to discharge (see italics above),

- the ability of the "listener" to give approving attention to the thinker even when they are discharging on potentially disturbing material,

- human closeness (as appropriate),

- mutual thinking to discover additional "contradictions" and to offer "directions"

Like part songs

As such RC is like many a folk-originated "part-song" or "round" consisting of several, simple parts which, when sung sensitively together, yield deep, surprisingly rich harmonies without requiring the singers to have any more than average musical skills. Like the one below:

I like the flowers…

I like the daffodils…

I like the mountains…

I like the rolling hills…

And I like the fireside…

When all the lights grow low…

A boomdiada, a boomdiada,

a boomdiada, a boomdiada

(back to the top, and repeat as desired)

Client as focus

In the RC process, the focus is on enabling the client (the "thinker") to discharge emotional loadings in order to free early memories from distressed feelings. This liberates otherwise limiting/damaging experiences from doing any further damage in the present.

No interpretation

The counselor (the "listener") makes no attempt to "interpret" the meaning of a client's material. This is a crucial difference from most forms of psychotherapy.

Free

RC is (relatively) widely available and, once learned, it is free to use. It is practiced in volunteer communities in many parts of the world and is under constant (careful) development as new techniques and insights are generated by these communities.

Grass-roots

The working-class origins of RC are a constant reminder to keep it authentic and simple while avoiding the relativistic pluralism that befuddles so many of us (by proposing that all approaches are equally valid) as we attempt to navigate the plethora of personal growth methods and modalities currently on offer.

Not therapy but world-change

Lastly, RC is NOT focused on the mental health of the practitioner, unlike therapies of one sort or another. Therapies usually seek to "heal" people so that they can fit into society. Instead, RC helps people to gain the clarity and courage to change society to fit people.

To do this RC has a well-developed set of conscious liberation-from-oppression practices that include detailed work on the elimination of internalized oppressions.

Accessing RC

There are two primary routes to learning RC and accessing the peer networks that organize RC communities.

1. Find a local community near you and ask to attend an RC Fundamentals Course (40 hours or so. It usually asks for a commitment of one evening a week). Benefits of this approach are that you are connected to a local network of experienced counselors and you can get physically close to your counselors.

Difficulties are that local communities may not be functioning, but you can't tell that without persistent inquiry. If you don't get responses to emails and calls this is the likely explanation and/or local communities may be recruiting only from specific groups (such as working class) in order to balance out their constituencies.

You can find references to local groups by using the contact form here[173]. Tell them where you are located and that you want to find an active local RC Community.

[173] https://www.rc.org/page/contact

2. Accessing local communities can prove difficult especially if we are somewhat transient. Because of that, we have gained permission to run an experimental RC Community in Gaia U for all who wish to join. The Gaia U RC Community is intended to function as a regular place to go for counseling partners and to access occasional face-to-face World-Changers workshops.

We have developed and run an online/webinar preparation course to lead into a face-to-face RC World-Changers Fundamentals. The online preparation course is designed to be comprehensive so that, with some extra one-to-one practice, a person could become a practitioner.

Email nopatrix@gaiauniversity.org[174] for an invitation.

To make a success of learning RC online, you will need to recruit another person with whom you can practice face-to-face in-between classes. This person can be a family member (but only if you are getting on well together) or, better, a trusted friend with whom you can share an hour to an hour and a half a week in a reasonably private space suitable for possibly noisy discharge!

Using the patrix insights

Andrew writes:

*Whenever I read a book, see an opinion piece on film, or in any other way get to know what other people think I want to know "where are they coming from."

This means that I want to know their likely biases preferably upfront rather than having to glean them from the hidden depths. Book jackets with photos sometimes help with this, but more often than not I am left in the dark around many critical (and interesting) factors concerning the author's groundings.

[174] mailto:nopatrix@gaiauniversity.org

The Patrix threads provide something of a framework for an analysis that is revealing, if not definitive and/or exhaustive and I would be delighted if every author used it in this way.

For example, I could include a version of the following materials in an introduction to my next book, and that would save the reader from having to do lengthy detective work to find out "where I am coming from."*

---

*I am a 67-year-old (hu)man, cisgender male, identifying as white. I was born in England (1949–wartime rationing was still in progress) and, during my austerity childhood, most of the adult men in my life, having recently returned from WWII, were in various states of recovery (and denial) from post-traumatic stress disorder.

I was state (mis)educated in a traditional Boy's Grammar School, and it took me until I was 27 to recover from this. I hold a Masters degree in Organization Research and Development – (no Bachelor degree), a Diploma in Management Studies and a Diploma of Applied Permaculture Design.

I identify as lower-middle class, coming from a family of school teachers stretching back three generations who made it into this (almost respectable) profession from a background of saddlers and harness makers, small farmers, coal-miners and the occasional managerial professional (coordinator class).

I have been self-employed for 35 years in a variety of boot-strapped micro-enterprises as a shoemaker, permaculture teacher and designer, book and seed seller, farmer, and more. Gaia U is another micro-enterprise in the stream. I currently think of Gaia U as my Capstone Project, and yet, maybe it's not!

I was born in and lived in the small market town of Totnes, Devon, England until I was 40.

I am in my second marriage–both to women. I am a father twice (from my first marriage of 25 years) and a grandfather 6 times over.

I emigrated from England 10 years ago and hold a green card in the USA. I've spent much of the last few years in a 30-year-old eco-village and artists' community in Mexico (co-founded by Liora, my second wife) working from a home office here.

I am learning Spanish (very slowly) as I have some distress around language learning.*

That's plenty to be going with for now. From the above, my readers would be able to identify several possible themes of The Patrix that might be operating for me.

Forearmed with this knowledge, they may more readily think critically about my work and check for likely biases.

Write your book jacket...

What would you write for your book jacket if the purpose was to honestly reveal your possible biases?

Spiral Dynamics

Spiral Dynamics: A System of Worldviews

Spiral Dynamics (SD) is one example amongst several[175] (note the "see also" section on this linked page) of a system that attempts to map our bio-psychological development. Spiral Dynamics is unique (and contentious) in that it goes on to propose that individual

[175] https://en.wikipedia.org/wiki/Loevinger%27s_stages_of_ego_development

bio/psycho development AND social/cultural development proceed on similar lines.

Spiral Dynamics can be thought of as a system of worldviews that proposes that we travel through a knowable/predictable path of developmental phases according to changes in the external environment.

Life Conditions Awaken Ways of Thinking

SD proposes that individuals grow and develop through exposure to experiences and circumstances. These, the experiences and circumstances, are known as "Life Conditions" in SD terms and experiencing various Life Conditions awakens characteristic "Ways of Thinking."

Everybody has the capacity to think in all ways, according to SD, but as our exposure to Life Conditions is uneven. So we are all at unique places on the spiral of different Ways of Thinking.

That is, each of us has different Ways of Thinking on the go, caused largely by the different Life Conditions we have been in and are experiencing.

The idea of vMemes

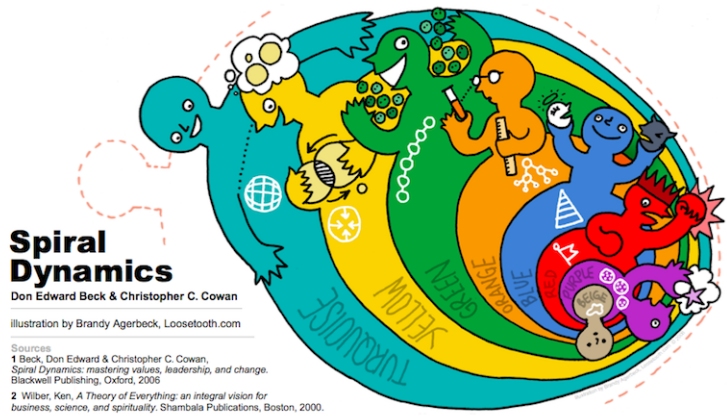
SD proposes that the Ways of Thinking, which are made up of various contributing memes, cluster together around a core meta-meme. This meta-meme is, in SD terms, called a vMeme (where v stands for Values) and it acts as a kind of attractor that holds a cluster of memes together in something like a coherent whole.

This makes it possible to reduce the variety of individual uniqueness into some "categories" and propose that a person, a group of persons or, even, a whole society, is thinking from a describable, limited number of vMemes or from certain "centers of gravity."

A summary

The graphic below attempts to summarize the Spiral Dynamics system. Each vMeme (confusingly labeled a "meme" in the graphic) is assigned a color, and the vMemes are arranged as a hierarchy according to the level of complexity found in the Life Conditions that generated this Way of Thinking.

Beige is used to signify least complex Life Conditions and, consequently, least complex Ways of Thinking. Turquoise is used to signify most complex Life Conditions and, consequently, most complex Ways of Thinking.



tier[1]	#	meme[1]	popular name[1]	structure[1]	motives[1,2]	characteristics[1,2]	% of pop.[2]	% of power[2]
2nd being	8	Turquoise	GlobalView	global	compassion, harmony	holistic, global	0.1	1
	7	Yellow	FlexFlow	interactive	adaptability, integration	systemic, conceptual, ecological, flexible	1	5
1st subsistence	6	Green	HumanBond	egalitarian	approval, equality, community	relativistic, personalistic, sensitive, pluralistic	10	15
	5	Orange	StriveDrive	delegative	autonomy, achievement	materialistic, strategic, ambitious, individualistic	30	50
	4	Blue	TruthForce	pyramidal	order, right & wrong	absolutistic, obedient, purposeful, authoritarian	40	30
	3	Red	PowerGods	empires	power, dominance	egocentric, exploitative, impulsive, rebellious	20	5
	2	Purple	KinSpirits	tribes	magic, safety	animistic, tribalistic, magical, mystical	10	1
	1	Beige	SurvivalSense	loose bands	survival	archaic, instinctive, basic, automatic	0.1	0

Spiral Dynamics continued

According to the SD analysis, the overall system is never-ending. That is, complexity in Life Conditions will continue to develop and, therefore, Ways of Thinking will also need to develop to keep up.

There is, therefore, no endpoint, no ultimate completion, no enlightenment, only a (possibly predictable) progression of Ways of Thinking that emerge so that we can make sense of and function in increasingly complex futures.

We will be using the Spiral Dynamics colors and concepts to good effect in a later element on Leaderful Communities.

The progression critique of SD:

A strong critique of spiral dynamics is that it assumes progress, that conditions for humans on the planet are getting ever "better" and that we are becoming more "civilized" by the day. That older vMemes give way to more recent ones because we are developing in a positive way.

Once we ask and answer the question of "for whom are conditions getting better?" where "whom" includes at least all human beings or, better still, includes all living beings, the idea of universal positive progress looks distinctly contentious.

A more nuanced view is that Spiral Dynamics reflects the development pathway of our current world system that manifested with deep distress, emerging first around the time of transition from Purple (gatherer-hunters, tenders of the wild, early agriculturalists) to Red (emperors, their courtiers and military officers living in defended cities supported by serf and slave agriculture-that is-a Patrix-based culture). This happened circa 6000 years before present (BP) for cultures in what was the Fertile Crescent and was stimulated by disastrous climate change. The switch went from moist/warm to arid/cold climate and was caused, it is thought, by fresh water from melted glaciers upsetting the saline stratification of the Atlantic Ocean and switching off the Gulf Stream.

This Patrix-based culture expanded, especially to the north, east and west, to eventually become the dominant culture of the Eurasian Continent and later, the American Continent.

Since these times, those of us affected have been attempting to recover (without much consciousness {although our primary religions have re-humanization at their core} and without complete success) from these early and inhumane cultures built on fear, panic, and sudden scarcity.

Only now, after thousands of years blundering through an incomplete and non-linear recovery (one step forward, two steps back), those of us with this Red culture in our backgrounds might be getting some glimpse of what a distress-free, ecologically regenerative, and socially just culture might look like. We may have just reached the place where conscious healing of the Patrix is possible.

Cultures with less pressure from climate change (less dense populations with space for movement, more adaptable, more experienced with and less traumatized by variable climate …) may not have been panicked into the pathway described by SD. If some of them did go this way, their subsequent immersion in wild nature was sufficiently healing to allow them to emerge on quite a different pathway than the one described in Spiral Dynamics. The Iroquois Nations[176] are one such example of a large, regional, diverse and yet coherent nature-immersed culture that reached Patrix escape velocity sometime before the 1400s.

See too, this video[177] from the Radical Anthropology group featuring David Graeber (of *The Last 5000 Years of Debt* fame) and David Wengrow that describes a fascinating, evidence-based conjecture as to how Purple cultures (spiral dynamics terms) were capable of understanding that hierarchies (class structures) were sometimes strategically valuable but definitely not appropriate as the primary form for a culture. Hence, these cultures only allowed hierarchy to exist temporarily and for specific purposes. The suggestion is that our current culture has forgotten that hierarchy needs to be regularly eliminated and expunged and not allowed to become a fixed feature.

[176] https://en.wikipedia.org/wiki/Iroquois
[177] https://vimeo.com/145285143

Activities - Thinking about Worldviews

Activity 1-Add your ArCeA evidence

Evidence of ARCEA – That's active reading plus critique, expansion, and action (imagined action at least). Create your XM*ndmap. Search Scholar skills and tech tips in Help and Support for details of how to make a live link so that you can share it as you desire.

Activity 2-Your Top Cards and Discards

Generate an analysis of your Worldview using the Top Cards and Discards tool[178] in Project Worldview.

Are there any surprises for you in this analysis? At the very bottom of the Top Cards and Discards tool, there is a summary section. Take a screenshot of your summary for your records.

You could also use this image in your frank Book Jacket blurb – see Activity 4.

Activity 3-Compatibility Analysis

Use the Quick Worldview Analysis tool[179] in Project Worldview to map your worldview and that of a person with whom you detect an absence of compatibility. Then look for both the memes/themes that are alike and those that are not alike.

If the proposition* is that you can work with another person where you can find common ground but not where you differ, what strategies can you imagine that would enable you to have a

[178] http://www.projectworldview.org/yourwvcards.htm
[179] http://www.projectworldview.org/yourquickwvanalysis.htm

constructive relationship with this person and what projects should you avoid for the time being?

Write this project up in a few lines. This activity may take longer than the others. Choose it if you have time to spare.

- The full proposition is that we CAN work with people with whom we can at least find some common ground, although that we may need to limit our connection carefully. As we develop a relationship it becomes increasingly likely that we can find more common ground and, possibly, let go of differences that previously seemed too important to accommodate.

Activity 4-Patrix blurb

Write a Patrix-revealing blurb for your next book jacket! Note that by doing so you are not convicting yourself of crimes but just letting other people know that, due to your identities, you may just have some particular residual Patrix patterns on board (which are, of course, not your fault and, in any case, you would like to be rid of them).

Activity 5-Gobbets of distress

Choose four memes from the Project Worldview Cards that seem to you to contain gobbets of Patrix-derived distress. Explain why you think this and how you think these distress patterns made their way into these memes.

Chapter 6 Growing Resilient Communities

Introduction to Community Focus

Interventions in Systems and Leverage

Many organizations, including a Gaia U "bigger sister" project, the Transition Network[180][181], focus on generating local thought and action towards ecosocial regeneration and community resilience. There are several reasons for this.

Firstly **this is the level** at which we can engage on a human scale. That is, a small group of people taking thoughtful leadership, can initiate practical actions and stimulate other people in the community to join in. They can do this by calling inspirational meetings, making personal connections in the community, and working to liberate local collective intelligences and resources.

This approach to change through one-on-one conversations and one-to-not-too-many (maybe 40 to 150 people?), seems the most effective. At this scale, we can model to people how we are making the changes ourselves. They can see how much we are enjoying (and otherwise benefiting from) the continuing results and we can offer some support to them whilst they adjust their own thinking and take their first steps.

[180] https://transitionnetwork.org

[181] If you have not explored the Transition Network yet, please do (link to Transition USA). This Totnes, England derived grassroots network, inspired by permaculture and yet seeking a more inclusive engagement with citizens seeking change, is expanding internationally and is active in seeking to widen participation across the boundaries installed by the Patrix.

Secondly, whilst it is surely helpful if larger scale systems are "enabling" and supportive to local efforts, local efforts are not entirely reliant on these large systems coming through. Nor are local efforts so easily thwarted when the larger systems are actively hostile to local goals. Indeed, this spirit of working up solutions[182] beyond the limits prescribed[183] by county, state, and national governments is a core philosophy of our movements.

Therefore, by working at this level, change happens. People experience a genuine sense of empowerment and begin to reclaim more ability to trust their own thinking in ever-widening spheres of influence.

Two examples[184] of these local solutions that go beyond the worldview of the "powers that be" are:

1. The rights-based actions initiated by local USA communities many of whom are supported by the Community Environmental Legal Defense Fund.[185] These communities mobilize to develop township-scale charters that determine what is and what is not allowed within their jurisdiction (to date these are mostly aimed at limiting the rights of corporations to extract water resources from the area and/or to run industrial farming operations in the locale). An important phenomenon with significant staying power, the CELDF offers a free online Democracy School.[186] If you have lawyers in your life, who want to know how to help make a difference send them here for a look.

[182]In the early days (2006 onwards) the Transition Network often focused exclusively on engaging a local community to work at designing actionable energy descent strategy for itself. An energy descent strategy seeks to dramatically lower the community's needs to import energy supplies over a long enough period to ensure that the descent is "soft" enough that everybody can adapt without too much chaos. The idea is to avoid a crash that causes trauma and exploitation. The goals have broadened since then.

[183]Prescription by authorities is a problem that comes in different strengths in different cultures and depending on the topic. It is also subject to change according to the worldview of reigning politicians.

[184]Please do send us links to other examples and we'll gather these into a list of resources.

[185]https://celdf.org

[186]https://celdf.org/how-we-work/education/democracy-school/democracy-school-online/

2. The Flat-Pack Democracy[187] initiatives launched by Peter MacFadyen in Frome, England that seek to stimulate citizen takeovers of governing bodies at town level by standing as independent candidates not subject to party control. These Town Councils and their rural counterparts, Parish Councils, have been stripped of much of their power by larger governing entities and yet, through liberating the creativity of local minds (in the form on new independent council members) are finding more and more ways of innovating beyond their apparent limits. For example, consider Gaia U Alumna Amelia Parisian, who now works for Edventure,[188] a School for Community Enterprise based in Frome, England. With the support of the town council made up of independents, Edventure/Amelia is developing a tiny house business that sites these living pods in the yards of supportive house owners (thereby avoiding zoning restrictions) specifically to provide low cost, convivial housing for young adults otherwise priced out of the area. Thus a small town builds community and lays in options to increase essential intergenerational vigor through a community enterprise that employs young adults… None of this would be possible without leadership, and the next topic looks at this function in detail.

The Importance of Leadership

Functions of Leadership

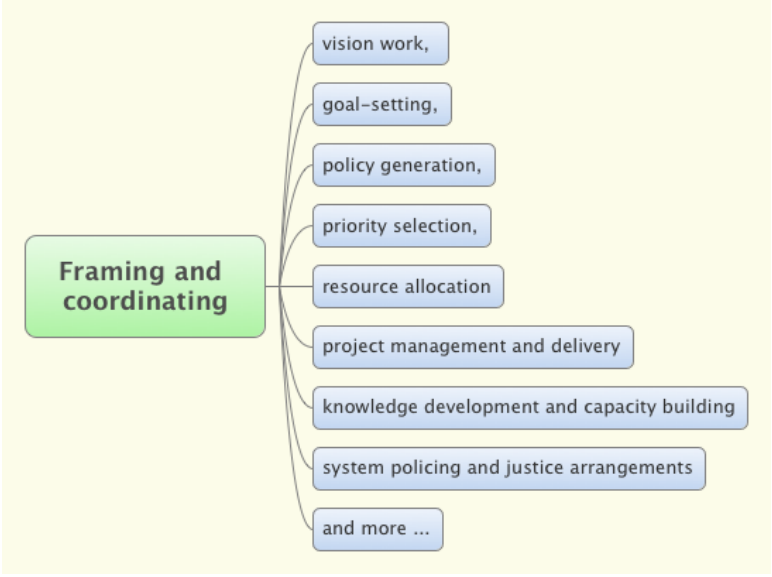
How a culture thinks and acts around leadership has a great deal of influence on at least the following cultural themes:

- **how that culture is shaped** and structured (we'd say designed, whether or not consciously). Some examples of shapes and struc-

[187] http://www.flatpackdemocracy.co.uk
[188] http://edventurefrome.org/courses/edventure/

tures include pyramids, matrixes, circles, systems, bridges, and links.

- **what the culture pays attention to** through the myriad functions of governance and management. These include framing the issues and coordinating the efforts through the activities shown in the chart below.



- **who is allowed to participate** in what ways in the culture, especially in relation to the critical "framing and coordinating" functions listed above.

The design and choice of leadership memes is core work for those of us working in world change. Indeed, generating and applying a coherent, ethical, and functional leadership meme-plex has been identified by several organizational designers[189] as a priority strategy for transforming organizational cultures.

[189] see, for example, *The Dynamics of Change: Insights into organizational transition from the natural world,* 1998, by Francis Strickland who, in turn, derives his models from the work of Burke and Litwin. Do look at the Burke and Litwin link as it leads to an extraordinary collection of organizational development assessment tools.

We can reasonably extend this understanding to mean that **a whole culture is open to significant transformation** through defining and designing around leadership.

Organizing

At a more prosaic level (common or garden level) we would say that a core function of leadership is to organize people to make something happen.

Our observation (drawn from extensive participation in "leaderless" groups and communities) is that without someone making the effort to organize and initiate activity, nothing changes, nothing happens. Folks just go about their daily lives with the usual amount of ease and/or struggle without much commitment to generating change, at least not at the systemic level.

Leadership, from this perspective, **is the frequently missing ingredient**. There is no end of change required, if only to adapt to the rapidly changing external environment and, therefore, there is no end to the need for innovative, creative, and flexible leadership.

However, our appraising view of the current human cultures soon reveals that there is:

- a critical shortage of people ready to take leadership, to gather and organize other people around common causes (although see this example[190]– one amongst many- for inspiration, and

- an insufficient understanding of leadership processes that work and that really do empower people.

In this element, we are going to be so bold as to propose that a **leaderful** culture organized with **Patrix elimination** at the core and using adapted principles and processes of **sociocracy/holocracy** may be a way forward.

But first, a quick look at the obstacles to progress in this area.

[190] https://wagingnonviolence.org/feature/brooklyn-women-make-their-building-theirs/

Abreaction

The most significant obstacle to the adoption of advanced, second-tier leadership (*a spiral dynamics term*) is, of course, the entrenched, power-rationing, Patrix-riddled and largely irrational leaderships that govern our current cultures.

Second tier leadership means, briefly, that the form of leadership is appropriate to:

- the goals of the community and to the broader society,

- the nature of the task,

- the capacities of people taking leadership,

and

- the ability of the people ceding the right of leadership to each other to act with integrity (not engage in attacks and not allow themselves to be co-opted for nefarious purposes).

The phrase "**how is who** is **leading whom** and **for what** purpose" is relevant here. This is a paraphrase of Clare Graves original "how is who managing whom and for what purpose."

Who will fill the vacuum?

Noting that our current cultures are collapsing under acute internal contradictions, and that our task is to have viable ecosocial alternatives at the ready. Otherwise, other options, most of which don't look at all healthy (Neo-Fascist "Libertarianism," for example), will continue to emerge to fill the vacuum.

Self-inflicted obstacles to progress

However, another (deeply ironic) obstacle of our own to the emergence of sufficient and effective leadership (and hence getting change done) is that, on the progressive edge of society, many

people are hostile to the very concept of leadership as, they say, it implies hierarchy, and we have had more than enough of that (hierarchy). Witness the class system, racism and, indeed, the whole of the Patrix.

This is an understandable (but, Gaia U proposes, not helpful) reaction to the domineering, authoritarian leaders, skewed systems, and dis-empowering processes that make up the current destructo-culture.

The notion of leaderless groups

As a result of this abreaction (to hierarchy and authority), over the past three or four decades, the concept of leaderless organizations and leaderless communities has become a potent guiding light for many people.

Arising from this "leaderless" meme are the proposals and practices of consensus decision making, leaderless group facilitation and focalizing, leaderless groups, and more.

These concepts have been very attractive and can be seen as all important challenges to the earlier concepts of leadership found in the various vMemes such as:

Red vMeme (authority stemming from superior military resources and the willingness to be brutal towards dissenters)

Blue vMeme (authority as a result of formal position in society and following a "book" of rules possessed by an elite that the community has no chance of changing. This commonly involves a Red vMeme policing system to maintain "order") and;

Orange vMeme (authority accorded to those who show the greatest "success," a form of meritocracy often based on the accumulation of wealth).

Derailed by distress

Attempts to progress to second-tier leadership (or, as we think of it in Gaia U, leaderfulness) are vulnerable to derailment by:

- communitarians whose espoused vMeme is Green going onto Yellow, but who are acting from unresolved and distressed abreaction to earlier vMemes, especially in their inflexible and absolute insistence to "no leaders." See "Masquerading vMemes" below.

- other community members who, whilst noticing the dysfunctions arising from confused vMeme pools, are afraid to generate the coherence and solidarity necessary to confront these dysfunctions just in case this may cause discomfort and conflict.

Masquerading vMemes

It is common for one vMeme to masquerade as another. This is because, for example, the Green vMeme is an evolutionary adaptation of the Blue vMeme (driven by increased complexity). This masquerade effect is most common between vMemes in the same colorways. That is all the vMemes in the warm colors, the vMemes about ** self-direction** (Red, Orange, and Yellow…) are strongly related evolutions of each other. Under stress conditions, a later evolution, say Orange, is most likely to revert to an earlier evolution in the same colorway; that is, Red. This is also true of the vMemes on the cool colorway, the vMemes about **being directed by others** (Purple, Blue, Green, and Turquoise). For example, a Green way of thinking will fold back abruptly to Blue under pressure.

Incidentally, as we make frequent use of the Spiral Dynamics model in Gaia U, it is well worth making the effort to commit to memory the vMeme color sequence, the "self" and "other" oscillations and the keywords used to describe these.

Result

Leadership goes underground

A common effect of the leaderless meme (from the Green vMeme zone) is to de-legitimize leadership and all its associated processes and drive it (and the creative initiatives that would otherwise emerge) underground. Any initiative struggles to thrive in these circumstances.

The results are networks and organizations that convulse themselves to the point of exhaustion in attempts to satisfy the confused yet dominant (or aggressive) absolutists who may espouse Green but come from an authoritarian Blue mindset; and who, therefore, insist that no leadership, no hierarchy, and no authority, is the one true way.

In these contexts individuals with organizing capacities commonly seek safety by back peddling into invisibility to avoid having their heads cut off (cutting the heads of the poppies is one way the "no-leaders" syndrome is described).

Alternately, they are required to pay inordinate amounts of attention to the principles of equal participation and relativistic pluralism.[191]

Meanwhile, they receive little or no support, training, or resource to help them function in their organizing roles and consequently the development of leaderfulness is weak.

Vulnerability to attacks

People in any group are vulnerable to attack, leaderless or not. However, in leaderless groups (or groups that some members

[191]Relative Pluralism: the Green vMeme notion that no-one is more expert than anyone else and that every point of view carries equal weight. Ken Wilber, who we might call an integral philosopher, notes that the relative pluralism inherent in the Green vMeme contradicts itself by proposing that this point of view is a uniquely superior notion (so, all of a sudden, we are back to a hierarchy of ways of thinking…)

think should be leaderless) leadership attack becomes much more common.

Attack means that any member of the network or organization may vent their distress by "critiquing" other people's organizing efforts (and often by impugning their character and morals) in public on the grounds that this is, in some way, an essential step in "correcting" any tendency organizers might have to reproduce the authoritarian tyranny of the destructo-culture.

These self-destructive characteristics of so-called leaderless groups repeat time and again and have caused the failure of many a progressively inclined and well-intentioned work-nets and organizations, whilst simultaneously burning out those brave souls who once had enough courage to lift their heads above the parapet and volunteer to organize something.

Inadvertently doing the work of The Patrix

Burn-out is brought on by attack and lack of support, potent mechanisms that serve the destructo-culture well by ensuring a totally inadequate supply of leaders in our movements. People become increasingly reluctant to step forward and risk such abuse and any group or movement without a clear understanding of how to counter-attacks from within is vulnerable to imminent implosion.

We need to learn about this fast.

Divide and rule

It is also easy for malicious external agencies to re-stimulate people inside the organization (by generating negative propaganda, for example), and have them unwittingly launch attacks that destroy any hard-built capacity for change and divert the group from working towards its goals.

This is the famous divide and rule approach that, for example, the Romans used to set subjugated people against each other in order

to divert these people from coordinating their resistance to brutal colonization.

See this recent evidence of government agencies engaged in destroying activist coherence[192]

Fenced in by consensus

A second issue is that work-nets and communities might well fence themselves in with consensus. That is they may have a constitution or other operating agreement that specifies consensus by unanimity as their decision-making method. Years down the track, when everybody (except the hard-core few) can see that this is destroying their capacity for constructive action, the trouble intensifies.

Why?

Because a full consensus is needed in order to abandon consensus and that almost never happens.

Possible solutions: including the ecosocial enterprise manifesto

It's not the structure, it's distress that gets in the way.

Here's the thing: consensus-like approaches are often promoted and held with deep (absolutistic – Blue vMeme) conviction that they are the "one right way."

Arguing against such a rigid position can be difficult as the pro-consensus folk would seem to have a moral authority (that proposes that no-one acquires inordinate power in their systems) on their side, whilst pro-leaderful folks would seem to be suggesting hierarchy with all its differential power implications.

[192] https://theintercept.com/2014/02/24/jtrig-manipulation/

However, what pro-consensus folk are much more likely to have on their side is deep, undischarged distress around being disempowered (with which they/we are chronically familiar) that is restimulated whenever anyone takes leadership.

Cultivate a delight in being well-led

Considering these dynamics, discharging the distresses should be the first place to go. Repeat – discharging the distresses is a critical job of any movement seeking to be effective in the long term.

Then we can all come to be comfortable, nay delighted, when our colleagues take leadership in an area (thus relieving ourselves from the need to do the same) whilst knowing that there is no shortage of opportunity for us to take any amount of leadership if we want.

Make limited life agreements

So, the very least we should do, if we can't avoid our groups adopting consensus, is to have an agreement that this is an experiment with a limited shelf-life. Once the time is up, the consensus period is over unless there is a unanimous consensus to renew it.

This important idea of limited life agreements is drawn from sociocracy – see below.

If not consensus, what next?

We are optimistic that the following (merely sketched) concepts and practices are a way forward for Gaia U folks.

The micro-ecosocial-enterprise + associations manifesto

Proposal: That we develop societies with multiple (in the millions) micro-ecosocial (regenerative) enterprises and organizations, none

of which has the potential to dominate or exploit a field or locality due to size or wealth.

At the level of these outfits (sole-traders, partnerships of up to 12 people, small cooperatives and so on) interactivity and meaningful participation in decision-making are much more possible than in large organizations.

Add in Leaderfulness, Patrix-Busting, and principled oversight from Cooperative Associations (see below) to facilitate genuine mutuality.

Develop Cooperative Associations that are easy-to-join, easy-to-exit, agile work-nets of small enterprises and organizations focused on maintaining and enhancing the autonomy and resilience of all members through devices like **income and capital sharing** (we saw these schemes in the Creating Regenerative Livelihood Elements). These devices allow for supported transitions, re-directions, successions, openings and closings, rest periods, and more.

Build the operational networks by bringing new organizations (eco-social franchises) into being in which the franchising organization is owned by the franchisees and their clients.

Associations have a regular oversight role regarding the micro-ecosocial franchises and organizations that include:

- capacity-building through coaching and mentoring, training and development, and more, of all members
- conflict analysis and resolution, especially by eliminating separation patterns held in place by the Patrix
- ensuring sufficient Patrix-busting activity takes place amongst all members to allow the associations to continually progress (and update) their ecosocial agendas
- enabling social justice through income solidarity and shared capital access

Associations also work on documentation, research, and development projects that are too big for micro-ecosocial enterprises to

handle on their own. Associations stream the results through the work-net.

Associations are epistemic communities that are concerned with ensuring that their members' ecosocial interests are supported by the policies put in place by any society-level governance systems through lobbying and advocacy.

Essential attitudes, tools, and approaches

The vision is systemic, allows for a wide variety of characterful micro-organizations and associations, and is, we think, second-tier by Spiral Dynamics analysis.

Such systems call for a large capacity to emerge leaderful groups and need, especially at the association level, advanced governance and decision-making processes such as those proposed by sociocracy and holocracy.

See Sociocracy (largely Green vMeme?) (also known as Dynamic Governance) here[193]

and Holacracy (more second-tier(?) yellow vMeme) here[194]

The 1 in 6 myth

Leadership as a scarce resource

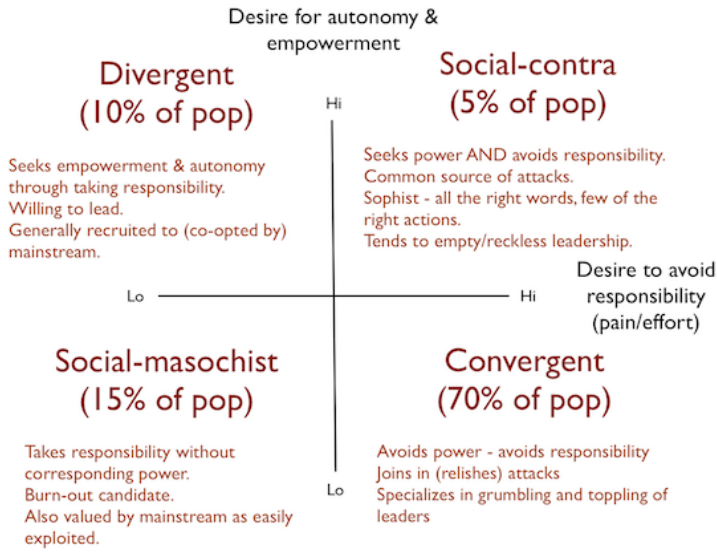
The late Bill Mollison, in *Permaculture, A Designer's Manual,* opined that, whilst leadership is an ever-needed capacity, it is unfortunate that only one person in six has an ability to lead well.

This estimate appears elsewhere. For example, Woody Woods, a veteran of the UK 1970s "blood on the walls" squatting and intentional communities era has constructed the following diagram and

[193] http://www.governancealive.com/dynamic-governance/
[194] https://blog.holacracy.org/

analysis of the general UK population-based loosely on research into learning styles.

(Andrew thinks this model is informative, relevant, and useful which is why it is reproduced here; but note it has no conventional academic credentials. Woody is a working class, tradesman electrician, with self-confessed and modest, self-taught academic literacy. His thinking, therefore, calls on the wisdom and insightful observations of a front-line action-researcher seeking answers to knotty problems on the ground more than that of a typical, academic, desk researcher[^foot71].



This model paints rather a bleak picture (only "dark" versions of behavior are noted in each of the quadrants other than "divergent").

Given the argument that nothing happens without organization, without leadership, and that there is an endless sufficiency of crucial activities that need thinking about, integrating, and the doing of, one in six looks like we are a little thin on the ground.

Happily, the thinking (and the evidence) from Re-evaluation Coun-

seling, is that everyone is capable of leading and only our distresses get in the way. Better, therefore, to clear these distresses out of the way, rather than attack other people who do take leadership. The leaderful model favored by Gaia University includes this thinking.

[^foot71] Tom Henfrey of the Schumacher Institute writes: "I think this is a bit off the mark. I completely agree with your point about theorizing divorced from real-world practicalities, but some desk research can be useful. It's not a typical methodology for social research. The problems tend to arise when whatever the methods, researchers use data in ways shaped by theory, rather than using theory as contingent ways to understand data better. (Analyses and other uses of data being used to support particular intellectual agendas – either supporting or challenging a particular body of theory, depending on what professional stake the academic in question has in it) – and being separated from practice, theory is never subjected to the plausibility test (i.e., does it work)."

A masquerade story

A story of Blue masquerading as Green (whilst aspiring to be Turquoise).

In the early 2000s, an iconic eco-community, dedicated to generating a spiritually-enriched, leading-edge culture, decided to seek to fully manifest in second-tier.

The community engaged Don Beck, one of the two authors of the 1998 book Spiral Dynamics – mastering values, leadership and change,[195] to run some workshops, to do some analysis of the community, and to recommend a strategy for progress.

The community was sure it was already mostly operating from second-tier and yet recognized that it had become arrested somewhere.

[195](https://www.amazon.com/Spiral-Dynamics-Mastering-Values-Leadership/dp/1405133562)

Beck noted, amongst other things, the obligatory heart and gratitude circles at the commencement of all gatherings; mandatory attunements and the use of other ritual tools as divination processes for decision-making; lengthy and costly initiations for potential new members with no guarantee of success, and more…

The presence of these operational features led him to suggest that whilst the community was espousing a vMeme-plex of GREEN/yellow/turquoise, it was more realistically acting from a purple/BLUE/-green center.

(Note that we can use lower case and upper case spellings to indicate the relative strength of vMemes: purple/BLUE/green meaning a person/culture with ways of thinking framed by clear purple elements but with a center of gravity in BLUE and with tinges of green at the leading edge).

This hidden masquerade was interfering with the community's perception of itself and blocking its attempts to strategically and thoroughly transition into second-tier.

According to Beck, not only was the community at a much earlier stage of evolution than it thought, but it was also missing almost any representation of the warm color vMemes. Indeed it was actively hostile to Orange ways of thinking (strive-drive-success) as it associated these with neo-liberal, materialist corporate cultures which, in turn, were identified as the enemy.

People engaged in enterprises inside the community, for example, were not considered "spiritual" enough to be on policy-making bodies for the community and were actively excluded from having influence despite their role in generating most of the available livelihoods.

Similarly, Red was considered primitive and worthy only of outright rejection.

Consequently, people with healthy Red/Orange/Yellow capacities were rejected (not spiritual or communitarian enough) meaning

that the innovative, creative, energetic leadership potential of these people could not be brought to bear on those aspects of the community that had to do with generating its own income and being a success.

To give this community full credit, it took these observations to heart and got to work on re-configuring its culture towards encouraging the expression of healthy warm color vMemes.

Over time this has led to increased capacity for moving out of the poor = ethical/spiritual syndrome (and that's NOT saying that rich = any better) and making much better functional (and therefore influential) connections with the local mainstream red/BLUE/orange culture.

This is an example of the use of Spiral Dynamics as a diagnostic and healing tool.

Leadership: Memes and vMemes

Web Resources (a statement of leaderfulness)

There is a vast and useful literature concerning leadership available on the web. Notice that it is now possible for us to judge the content of articles, books, and other resources by using the Spiral Dynamics language of memes and vMemes.

This short summary article[196] on the importance of leadership issued by the web accessibility advocacy group, WebAim, is a good starting point and has excellent follow-up links included.

Contained in WebAim's own summary article is the following valuable exhortation to guerilla leading (just substitute goals and vision of your own for WebAim's goal of web accessibility):

[196] https://webaim.org/articles/imp_of_leadership/

If Not You, Who?

*Members of an educational community, business, or agency can all have the best intentions when it comes to creating a web presence that is accessible to those with disabilities. Too often, however, these individuals with good intentions wait for someone to come and help lead them.

Change is a difficult path. It is common to be told to acquire new skills because change is going to happen. So you do just that . . . you obtain the skills you were asked to . . . you wait for some new policy, some new set of procedures, someone who will support what you were implicitly asked to do . . . yet nothing happens.

This scenario frequently occurs when nobody takes a leadership role. Even when leadership will occur within a group, the group will be more effective if someone takes the responsibility of "carrying the flag" to its intended destination.

You probably remember the famous line,

"If not you, who? If not now, when?"

If you truly believe that access to your website is essential (or required) for your organization, then I ask you to answer this question for yourself.

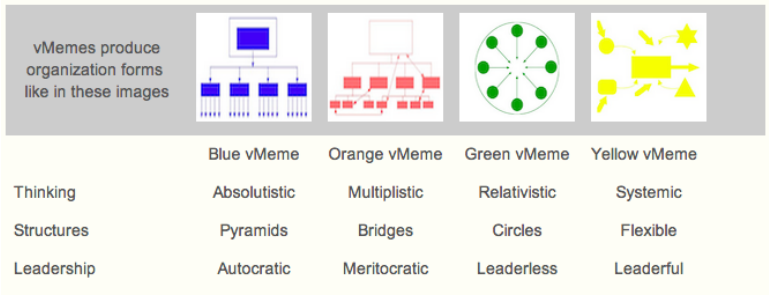
Your own actions or inactions will speak louder than any voice you give to this effort. You should not assume that someone else would take this role. You should not assume that it would happen in the near future.

The only way you can assure that web accessibility will become a part of the path of change in your organization is if you consider taking the lead, now.*

Memes and vMemes explored

We can use the Spiral Dynamics model to describe the range of leadership memes. In this case, we are starting from the Blue "Truth Force" vMeme and working through to the Yellow "Systemic" vMeme.

This diagram starts us off.



	Blue vMeme	Orange vMeme	Green vMeme	Yellow vMeme
Thinking	Absolutistic	Multiplistic	Relativistic	Systemic
Structures	Pyramids	Bridges	Circles	Flexible
Leadership	Autocratic	Meritocratic	Leaderless	Leaderful

And here is more detail on the leadership assumptions in each of the featured vMemes.

- People enjoy doing the work which fits who they are naturally (and who they are, is dynamic as they re-emerge from the effects of the Patrix) AND, they are ready to do their share of any grunt work that needs doing.

- We all have easy access to the information, tools, materials, and resources (and may well become intra-preneurs: people who create enterprises inside of larger organizations/networks making use of

the larger organization's resources)

- Organizations are recognized as transitory states, and change/-transformation processes are embedded in the organizational culture

- Learning and understanding motivate people, not payoffs or punishments

- People have widely overlapping competencies and capacities with some extraordinary differences too. People enjoy a mix of doing work AND visioning, organizing, and coordination work.



- People want to be in harmonious groups, accepted by their peers as friends

- Sharing and participating lead to better results than competing

- Emotions need attention, but hard feelings and conflict should be avoided

- All members of an organization should have their say and be included

- The organization is responsible for the community's well-being



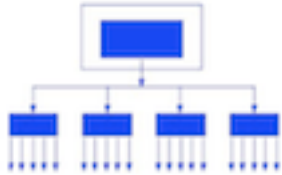
- People are motivated by opportunities to achieve and acquire material rewards

- Competition improves productivity and fosters growth through opposition

- The tried-and-true is best although it can always be improved upon

- Workers want to get ahead and to have more influence over others

- Here-and-now success is evidence of rewards to come in the future



- It is humankind's duty to work willingly for, and without critique of, the one true way

- People must be shown their duty and coerced to do it by punishment for failing to keep to it

- We are all cogs in a system, fulfilling roles that we are destined to, someone else knows better than we do

- Higher authorities rule by right, compliance with authority is essential although when fear and repression are engaged to ensure compliance, they are to be used only according to the proper rules and codes of conduct

- We owe the system our loyalty as it provides for our well-being

The view from Second-Tier

According to the Spiral Dynamics hypothesis, a fundamental shift occurs when the first tier Green vMeme gives way to the so-called second-tier Yellow vMeme (the shift being due to Green's

inability to provide useful responses to the increasingly complex life-conditions of its users).

From First Tier to Second Tier

For the first time in the spiral, users can "see" their own path of evolution, can appreciate the value of their passage through vMemes and acknowledge the relevance of specific vMeme thinking to specific circumstances.

Up until now, in first tier, each vMeme sees itself as being the "right one" and all others as, to an extent, "wrong". And, if a culture is prepared to acknowledge its history at all (usually it refuses to be honest about this), the earlier phases are thought to be unfortunate mistakes: false, primitive steps on the path of progress.

It is this first tier conviction, that "now we have got it right at last," that allows these vMemes to seek to destroy any others that they might come across (as mistakes that need to be obliterated so that everyone can benefit from the indisputable gains of progress).

At second tier the view of leadership willingly includes (and transcends) the views of leadership found throughout the spiral as it has unfolded so far rather than considering them unfortunate errors.

That is, each manifestation of leadership is/was appropriate to the life-conditions at the time and is/was appropriate for selective use now.

This flexible way of thinking allows the user to call on, for example, Blue leadership memes when working in a Blue set of life-conditions. Orange and Green leadership memes are likewise available in appropriate situations (note that in the case of Green, leadership is more likely to be re-languaged to something like "focalizing," "stewarding," "curating," or some other less re-stimulative (to Green users) term/concept).

This capacity, to draw down and use a wide range of leadership approaches, is very valuable.

How who leads whom to do what and in what context

The phrase in the heading above becomes a significant and meaningful inquiry string in which the capacities of the notable actors (those leading, those supporting, and those following), the task (goals) in hand, and the context all intersect to generate the "answer." This takes us out of the bind that proposes that there is a "one-right-way" for leadership to manifest, a view that steamrolls over the complex needs of actors and context.

A true story might help illustrate the advantages of this flexible approach.

A true story of flexible leaderfulness

The community youngsters (7-year-olds) accidentally set fire to the old hay bales in the barn one afternoon (whilst playing at cooking food for the chickens!). I was delighted that the local fire-service turned up within a half-hour of our call for help and that the senior officer took firm charge (Blue) and confidently ordered the crew about as they deployed to tackle the (by now) impressive and scary blaze.

It took them a couple of hours to get the blaze under control and thus eliminate the risk that it would spread to my dwelling next to the barn and to the sheds across the yard.

At this point, the chief called the group together and asked them what their views were on dealing with the now smoldering hay pile. This was motivated partly through a desire to have the volunteer (mixed-gender: Green) fire-fighters get better at their job by exercising their capacity for guided critical analysis (Orange) and also partly by a need for them to accommodate to the workload looming up ahead by participating in the design of a functional strategy (Green/Yellow).

Once a strategy was developed (all the bales needed to be pulled out of the barn, broken up, and the mass of smoldering hay embers wetted down) the fire-chief went off to another job. The crew cheerily set-to for several hours of arduous, dirty work–all the time singing songs and bantering with each other with a clear sense of camaraderie and mutual support (Purple).

Meanwhile, the community supplied ice-cream, iced drinks, and sandwiches as our support offering (Green). By early morning (3:00 am), everything was safely organized so that a flare-up was, more or less, unlikely.

The day after, our office manager worked in a very orderly way with our insurance agent to generate a valuation of the destruction and submit a claim (Blue). The rest of us trekked the spoilt, wet, and burnt hay 200 yards upslope to a tree-planting site and mulched out the weeds under the young trees (maybe a little Yellow thinking with lots of Red grunt work?).

All-in-all, several vMemes were called upon in order to match the capabilities of the actors (leaders, supporters, and followers) and the range of contexts.

Having access to all these ways of leading was a significant advantage, and no-one was required to pretend that they were not taking charge when that was essential to success…

Un-healthy vMeme expressions, recovery from shock

Earlier, we referred to the effects of stress on vMeme expression in a culture.

Reversion

The observation is that, under stress conditions, a culture can revert back to an earlier stage of evolution, especially a stage (vMeme) on

the same axis. The axes are either about *self-direction (warm colors) or other-direction (cool colors).*

The response to stress may go through an initial phase in which people reach into their "better" humanity and respond from an "other" oriented, altruistic way of thinking. However, as the stress conditions persist (for example, during famines), these memes give way to increasingly self-oriented ways of thinking and/or the expression of the core vMemes becomes increasingly distressed and unhealthy.

The need for discharge

Because unhealthy expressions are likely to increase with stress, we continue to emphasize the importance of discharging distresses. Well-discharged people are much better able to keep thinking in stress conditions than people who are carrying unexplored emotional loads.

Resilience in the face of shock

Many of you will have read Naomi Klein's book *Shock Doctrine – The rise of Disaster Capitalism*[197], and you will recall the thesis:

*"The shock doctrine": [means] using the public's disorientation following massive collective shocks – wars, terrorist attacks, or natural disasters — to achieve control by imposing economic shock therapy. [Some of which may be deliberately generated to deliver more shock.]

Based on breakthrough historical research and four years of on-the-ground reporting in disaster zones, *The Shock Doctrine* vividly shows how disaster capitalism – the rapid-fire corporate re-engineering of societies still reeling from shock – did not begin with September 11, 2001. The book traces its origins back fifty years, to the University of Chicago under Milton Friedman, which produced many

[197] http://www.naomiklein.org/shock-doctrine/

of the leading neo-conservative and neo-liberal thinkers whose influence is still profound in Washington today."*

Naomi Klein urgently requests us to:

- develop resilience against shock in the first place

- develop increased capacities to recover rapidly from shock, and, Gaia U would add,

- develop good skills for counseling/mentoring your friends, family, and communities in capacities for resilience and recovery.

Therefore

Cultures that are pushed into reversion/re-stimulation to early stage, unhealthy vMeme expressions are ugly and dangerous. We now know what to do to mitigate this scenario (one good strategy is to learn and teach RC) – and, now we need to get down to doing it.

The story

Paraphrasing Thomas King, author of the powerful book *The Truth about Stories, A Native Narrative*[198]…

- *Take this story – it is just a story – and see if it works for you. Do with it what you will. Cry over it. Get angry. Forget it. Laugh about it.

- But don't say in the years to come that you would have lived your life differently if only you had heard this story.

- You've heard it now.*

Attending to the health of the whole spiral

Spiral Dynamics advocates are fond of the idea of paying attention to the health of the whole spiral. We agree that this is essential.

[198] https://www.amazon.com/The-Truth-About-Stories-Indigenous/dp/0816646279

One of the most significant gaps in the attention of our movements is to do with the rehabilitation of people with unhealthy expressions of their vMemes.

Psychopathy

For example, we have only the vaguest ideas of how to deal with people governed by psychopathic distresses. People with extreme psychopathic distress patterns are capable of profound indifference regarding the suffering of others and have very little difficulty committing to one action (promises made in speeches at election time are examples) and then doing the very opposite shortly thereafter, without any sense of irony or remorse.

According to Kevin Dutton, author of the recent (2012) book, *The Wisdom of Psychopaths* (see this summary article)[199] people with especially strong psychopathic distress patterns are great as fearless, swashbuckling adventurers, hard men/women without consciences, and ideal power politicians as they are without remorse and can easily say one thing and do another without even noticing the contradiction.

Thus, people with highly active psychopathic patterns are able to serve the dirty needs of disaster capitalism without experiencing any disabling dissonance and are much in demand – just so long as they are not too extreme.

We all have some of it

Note that we are taking the view that we all have some level of psychopathic patterns. This is contrary to the common understanding that there are people who are psychopaths and then there is the rest of us.

This binary (psychopath or not) option is old thinking from the

[199] http://www.kevindutton.co.uk/books/the-wisdom-of-psychopaths/

mental health world which proposes that a person is either certifiably mad or not.

A more comprehensive view is that we all have irrationalities of one sort or another and whether or not we are certified as mad may very likely depend on circumstances other than our mental state (think Soviet Union incarceration of dissidents).

Self-healing and becoming an ally

This "we all have some of it" view is helpful for the reason that, while you and I are active in discharging our own tendencies to indifference and to speaking with a forked tongue (saying one thing and doing another), we are gaining valuable insight into the necessary steps a person with more severe expressions of these unhealthy memes would need to take. Thus we are gaining the capacity to be their allies in a healing process.

By healing ourselves and then transferring the knowledge of how to do this, we can work towards the goal of healing the whole spiral.

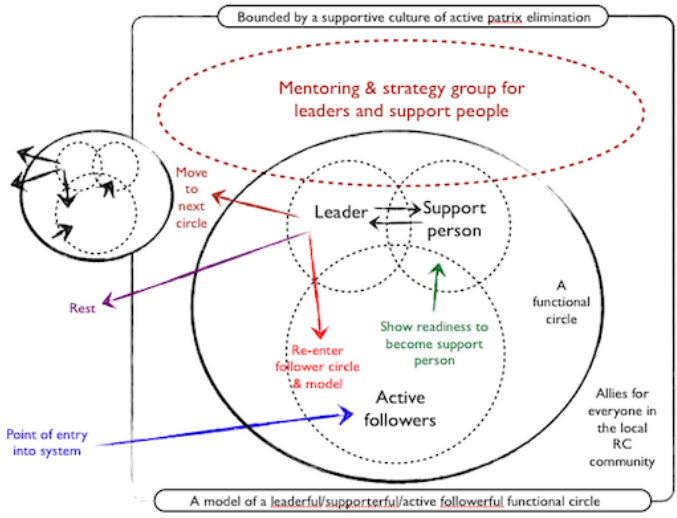
Goal: ecosocial regeneration

Through this process, we help to ensure that the emerging transition for human cultures is towards ecosocial regeneration and not further towards desperate destruction.

The Leaderful Model Expanded

The Leaderful Model

The graphic below is a start at illustrating the key principles of the leaderful/supporterful/active followerful proposal.



Assumptions and Principles

The leaderful model (more accurately called the **leaderful/supporterful/active followerful model – LSF**) assumes that our group/-community/organization has an ideal context (and/or is prepared to construct such a context) that includes:

a) a commitment from all involved to active elimination of The Patrix. Note this is not an anti-this or anti-that stance (these stances tending to invoke rigid absolutism) but rather a constructive understanding that everyone is carrying threads of The Patrix and, thus, we all need to work at removing it whilst being "held" in a supportive and close community.

b) an active RC Community to hand so that anyone inside the functional circle has the recommended option of drawing on allies from **socially and functionally separate** networks. That is, some (most) of your counselors are people with whom you have only a counseling relationship. With these people, you can work on

stuff that might re-stimulate your friends (social) and colleagues (functional). This arrangement avoids re-stimulation interfering with good friend and/or working relationships.
If b) is missing the creation of such a community becomes a priority project of great value.

The model also assumes that access to the ladder of roles (indicated by the arrows) is only limited by the performance of an individual. That is, an individual qualifies to climb the ladder simply by demonstrating the competence and attention needed to work well at the previous level.

This proposal is contrary to the progressive edge (Green vMeme) idea of unrestrained access to organizing roles. In Green vMeme conditions there is a reluctance to discern (it would be called "judging or discriminating") and so anyone who offers, gets the job whether they are competent (capable) and, often, even when they don't have time for the job (attention).

The leaderful model thinks differently and chooses who gets to play in what spaces.

This is to avoid handing power to the syndromes below.

social contras (gimme the power or else! but don't expect me to use it responsibly),

convergents (hand it to me on a plate please and then I'll complain) and

social masochists (I'll do it but resent you forever)

A primary tool for discerning in this respect is to offer a person who shows **competence and attention** at any given level a go at being a support person for a lead person at that level until they demonstrate their abilities.

Double value from the support person role

When a person takes an organizing and leading role, they are exposed to an increased level of risk of becoming isolated. There are several intersecting reasons for this. One is that their role will come with a workload that active followers do not have. This workload spreads out either side of the project (preparations, post-project evaluations, follow-ups) and runs through the project itself.

It includes:

- thinking well about the event/project coming up,

- thinking well about the people involved and seeking to make sure that all goes well for everybody

whilst

- making sure that the project goals are met

and

- seeing that any follow-up is attended to

It may also involve making practical arrangements ahead of time for certain resources to be in place, making sure everybody knows what is expected of them, dealing with contingencies that turn up during the project, re-framing the project when conditions change, ensuring everyone stays safe and more.

Tendency for isolation

Frequently (and especially in volunteer organizations) the lead person is the only person who is expected to pay attention to all these crucial details, and this is enough to separate them from the rest of the team. For example, when everybody else is able to take downtime the lead person is likely to be busy planning/organizing the next phase.

Add to this the stress of navigating and integrating the psyches of the individuals that show up in a group, we can see that

taking leadership responsibilities can easily become demanding and difficult.

Invoking the support role to contradict isolation (and train new leaders)

We can contradict and mitigate this isolation and, at the same time, train new leaders by:

- making sure our leaders do not get overwhelmed and isolated by providing them with live support

and

- searching out people ready to develop their leadership abilities who get training by providing this support.

(a worthwhile question to ask in any group situation, almost surely not out-loud is, "is the leadership here supported well enough as far as I can see?" If the answer is no, think what you can do yourself to add in additional support?

Invoking the support person role

The essential thinking here is that no-one should have to shoulder the extra responsibilities and workload attached to leading without a support person to hand.

The support person has several functions, for example:

- to be ready to step in for the lead person any time the lead person needs a rest or is otherwise unavailable

- to take the initiative to call on the lead person ahead of each work phase to hear the lead person's thinking (think and listen style) about how to organize and for the support person to share their own perspectives (without attachment)

- to be available after the phase/event is over to debrief with the lead person firstly by listening to the lead person speak to "what

went well" and "what could have been different" and then to speak to these themes themselves

- to be available at any time in the event to provide think and listen space for the lead person to take time for themselves, and/or to think about the project (discreetly if in a group without any significant RC experience or in public when the group is RC trained and therefore understands that leaders need to take "sessions" to keep thinking well)

- to anticipate and do any work they can that will relieve the lead person from having to pay attention to various details

- to head-off (interrupt) any attacks that are directed towards the lead person and ensure that people with complaints and criticisms understand that they (the complainant) should deal with any possible re-stimulation first and then consider if their feedback is still relevant

- to pass on any legitimate feedback to the lead person in a calm, private way and invite the lead person to think how they would like to deal with it and then to assist the lead person to do so.

- to maintain a warm, affectionate, and confident attitude regards the lead person at all times and to avoid being pulled into acting from their own or anyone else's re-stimulation.

The support role as training to lead

Being a support person is a challenging yet rewarding role.

It is **challenging** because it requires a high level of capacity to think well on behalf of another person and to avoid thinking only of self. It is **rewarding** because it is a powerful way to gain insight into the thinking of an experienced lead person and to train for a lead role too (this being the goal: from active follower -> support person -> lead person).

A person's performance in the support role is a very good indicator of their capacity to take a lead role.

Gender and support

Because of the way gender roles intersect with support and leadership, it may well be that women need to do less supporting and more leading whilst men focus on learning how to be good support persons, especially for women.

Dealing with the stuff

Taking both leading and supporting roles inevitably brings up stuff (distress) – overconfidence, under-confidence, fear of exposure, and more.

This is one very good reason for taking these roles, as the incumbent then has a great opportunity to discharge these distresses. This will accelerate the development of their leading abilities.

Expanding the support person role

Lastly, in larger groups and organizations, the support person distributes additional support functions out into the group of active followers and keeps track of how the people in this larger support team function (with a view to assisting them to gain greater leadership skills ready to take more significant roles).

Here we show two models of this expanded support group – the one used in Re-evaluation Counseling workshops which is focused on being very functional - and the other, from the Nature Connection movement which uses the Art of Mentoring and other tools to bring all humans fully into connection with nature.

These two models have quite different vMeme centers of gravity, so it is instructive to compare them.

Expanding the support role: Re-Evaluation Counseling style

This is a list of roles prepared by the Leader's **Support Person** for an RC Wide World Changers Workshop held in Manchester, England in 2011. (Liora and Andrew from Gaia U attended it.)

The full text is included here (warning, it is long but included in its entirety, so you get a sense of the thoroughness). You may want to copy it at some time to use as a basis for an event you organize…

Roles:

(Minimum two people in each area please – lead person and support person)

Access

Ensure the fullest possible participation in a workshop for those who have identified physical problems, so that their needs are as well met as can be done.

Set up the room with this in mind. Mark gangways, allocate sufficient mattresses and label them as well as special chairs.

At the beginning, introduce your team briefly and say what you will be doing and what you expect.

Ask as yet unidentified people with particular needs to make themselves known to you.

Be firm throughout the workshop about keeping gangways clear and mattresses and chairs reserved for those who need them.

Make further announcements as needed, but keep them creative, cheerful, effective, and brief.

Check in regularly with the people in question, and when problems arise if you can't see how to solve, offer to counsel where appropriate and think together with the person about what can be done.

Mistakes will be made, and not all problems will be solved.

Allocate allies where requested, clarify their roles or encourage them to do so, and arrange counseling for them or team them up to counsel with each other.

To summarize, **access** involves:

LEADERSHIP of the entire workshop around thinking about how to fully include those with particular physical needs.

BUILDING A SUPPORT SYSTEM of allies for those who want them, and making it sustainable.

THE PRACTICAL TASKS of assembling, allocating, and using resources to meet identified physical needs

COUNSELING to improve thinking: each other on the team; the people who have particular needs which may not, in the end, be met; and the designated allies.

You are not servants, you are thinkers.

Announcements and notices

Make announcements as requested by Workshop Leader, Leader's Support Person, and others.

Use your discretion about when to let people speak for themselves (e.g., access).

Announcements must be written clearly and given to you in advance.

Don't read out anything that would be better dealt with by writing it on a large piece of paper on the wall, like lost property or lunch tables.

Beauty and Order

Bring a few lovely and inspiring things to put on the walls and make the room look like ours.

Remind people to take responsibility for their own mess.

Liaise with access concerning gangways and where to put shoes, bags, and coats.

Tidy up as needed, but keep asking for help and reminding others to do it.

You are not servants, you are leaders.

Folders

Buy folders for the content, have the material photocopied that the Leader's Support Person will discuss or send. Then put it in the folders and bring them along.

Give them to Registration. The Leader's Support Person will discuss this when the details of the folder contents are confirmed.

Food liaison, diets and snacks

SNACKS: Buy fruit for 63 people, allowing six pieces each. Go for good value, seasonal, and good quality rather than organic. Bananas and plums are liked. Unripe fruit is a waste.

Buy very basic snacks: oatcakes, crackers, peanut butter, jam and/or honey, nuts? Chips? Whatever you think.

The snacks will only be put out at night since the evening meal is early. Keep the snacks area clean and tidy. It can be in one of the subsidiary meeting rooms.

Bring a plastic sheet to put on the carpet and lots of paper napkins or plates.

DIETS: Buy soy milk, rice milk, and gluten-free bread. Label clearly who can use it, and remove it and look after it after meals. Make sure the buyer has the food needs list, so that person can judge amounts. Liaise with the kitchen as needed over diets.

Literature

Bring appropriate literature. Set up a stall in a subsidiary meeting room with prices clearly labeled.

Make an announcement indicating the procedure you want for sales.

Advertise the literature, putting successful outcomes (they buy and read the stuff) ahead of entertainment value.

Consider a topic group in which you counsel people on their difficulties around reading, general ones or specific to RC.

You could recruit someone from outside your team to lead this if you wanted (this is a learning from a previous workshop – and is only a suggestion).

OHP and projection kit

Set up the projector (provided) and your own laptop, and service the typing team. Select a female apprentice or two and teach them how to be techies.

Play and creativity

Think of ways of being playful within the main room that are not threatening to people in wheelchairs, and take initiatives.

Set up a play area or a wrestling area in one of the other rooms and invite people to join you. Offer things to do in the longer break well in advance.

Make an early announcement asking people to write up what they can offer. Decide what to accept. Then write up details of what will be offered by whom (where to meet, when), so there isn't that boring period of people milling around wasting the break.

It is fine if most people want to rest or go for walks, but it is good to offer games, skipping, yoga, pilates, dance, etc… or wrestling as well. Remember inclusion.

Be the creativity team for the culture share. Recruit any help you want.

Be the MC for the culture share.

Bring with you hats or little bits of costumes, Frisbees, skipping ropes, a ball – whatever you think.

Problem solving

Decide when to help the person bringing you the problem think it through and act and when to refer it to some other team or the organizer.

Punctuality

Encourage promptness at classes and meals. Lead participants in respecting Leader's schedule.

Registration

Welcome everyone to workshop. Give them their folders. Tell them where they are sleeping. Collect any leftover money and record.

Collect agreed on contributions to fares. Later, distribute fares to those who need and have asked in advance. Repay people who have had expenses. Make a clear record.

Rubbish and recycling

Supply compost bucket with a lid in snacks area and somewhere to put paper for recycling. Make sure they are clearly labeled. This should get rid of any need for announcements. Dispose of as appropriate.

Scribes

Prepare anything needing to be done in advance for folders – wait for communication from the Leader's Support Person. Find a few quotes for walls and bring along. Be prepared to write as requested. The Leader Support Person will bring materials.

Shabbat

Buy and bring materials for Shabbat (claim expenses from registration). Explain and share Shabbat, using Gentile allies however you like. Maybe allies can support beforehand for getting materials, for time, or just solidarity.

(Editor: in RC there is a strong commitment to contradicting the anti-semitism that has made it unsafe for Jews to be visible)

Singing

Prepare a simple songbook suitable for this workshop or bring leftovers from other workshops (don't spend a lot on this, not everything that's sung will need to be in the book).

Make sure songs aren't all older people's generation. Old favorites and some new, young, but not difficult ones.

One songbook between two is enough. Claim expenses from registration.

This is a leadership job. It is up to the Workshop Leader, but you will have some leeway to judge when singing would lift the tone and unify (as opposed to making us numb and comfortable). Choose appropriate songs and give a good musical lead.

Decide some songs in advance, so there's not a lot of faffing around and false starts, but be ready to be flexible and allow new and different songs and suggestions from the floor.

Be aware of possible interference between group singing and playfulness.

Skype

As an experiment, two co-counselors who can't come (illness) may be following part of the workshop through Skype. Enable this – laptop provided.

Travel Liaison

Please take charge of ensuring that there is parking for people with mobility problems – ring the hostel to book it.

Groups of co-counselors in the same area or region should be able to liaise their own travel, but if people want your help with meeting up with people halfway or offering lifts, I will ask them to contact you.

At the workshop, put up a sheet of paper at the end for people wanting lifts to the station or wanting or offering longer distance lifts.

Typing

Assemble a team probably including these five people…whoever is willing and able.

Work out a rotation of agreed time slots and have the next person support the person typing.

Test that your choice of font size will show up well when projected on the screen so people hard of hearing can read the workshop content as we go along.

Liaise with the IT person. Prepare the laptop for ease of typing and decide how to save documents. Send them to Leader and, with his permission, to XX who has a problem taking notes.

All – take sessions on anything that comes up for you around these roles and enjoy the workshop!

Gaia U Associates:

vMeme-plex at play – what vMemes do you see in here?

Expanding the support role: Art of Mentoring style

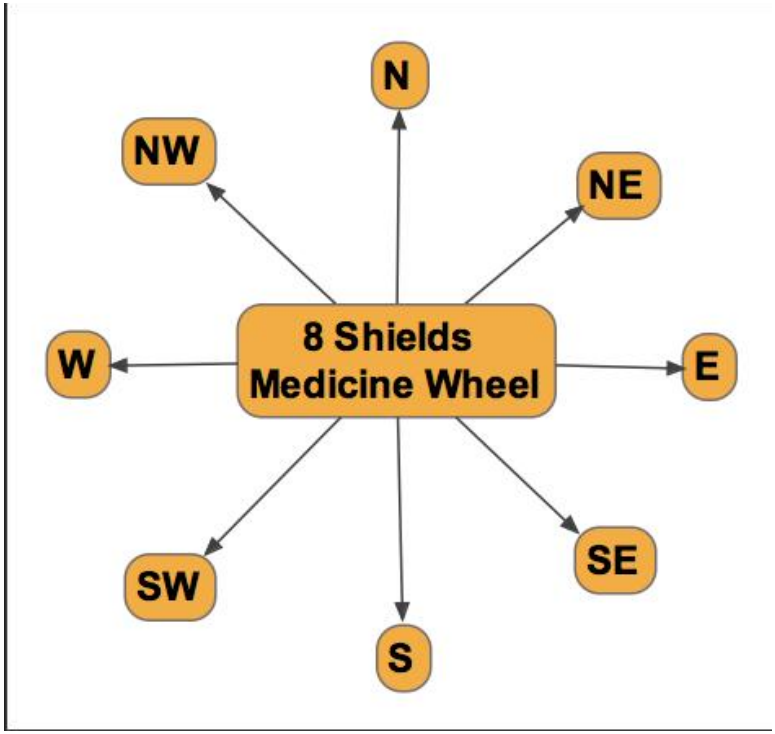
Art of Mentoring

The 8 Shields model (a brief exposition) and a resulting "Acorn" on the next page. An Acorn is the name given to a group organized using this model.

One of the current, popular models for considering the collective distribution of support roles is the 8 Shields model, evolved over 25 years of action research in cultural mentoring by Jon Young and Wilderness Awareness School and in use by several Gaia U associates, graduates and advisers. Indeed, the model has wider uses than defining support roles, but here we are considering just that function.

Connor Stedman, in his Gaia U BSc Portfolio, OP2,(not currently available) wrote:

This model is best understood as an interpretive and organizational tool, and as an expression of archetypal energies that recur throughout life. It is no more "true" than the permaculture design principles, or any other set of meaning-making symbols is "true." Also important: the 8 shields have been developed as a "generic" and culturally accessible archetypal map, and has not been drawn from the traditions of any specific indigenous culture. Medicine wheels play a particularly important role in the cosmology of many American Indian nations, and are very diverse in their particular significance and symbology from community to community. To use a culturally specific medicine wheel as a generic, archetypal map would be very inappropriate, and the richness of meaning of its symbols would in all likelihood be lost on outsiders.



*Each direction on this wheel represents a quality of energy drawn from the sun's cycle over the course of one day.

(Please note this is configured for the Northern Hemisphere)

E – Sunrise

SE – Mid-morning

S – Noon

SW – Mid-afternoon

W – Sunset

NW – Twilight

N – Midnight

NE – First Light

This same qualitative cycle can be perceived over the course of a year:

E – Spring

S – Summer

W – Fall

N – Winter

…with the intermediate directions carrying the energy of transitions between those seasons.

Now, the life cycle of an annual plant:

E – Sprouting

SE – Rapid growth

S – Reaching full size, flowering

SW – Internal hardening, fruit developing

W – Seed matures

NW – Seed dispersing, plant dying

N – Seed lies dormant

NE – Germination

And, the life cycle of a human:

E – Birth through young childhood (∼0-5)

SE – Childhood (∼6-11)

S – Adolescence (∼12-17)

SW – Young adulthood (∼18-25)

W – Mature adulthood, child-rearing (∼25-45)

NW – Past physical prime, aging (∼45-65)

N – Elderhood (∼65+)

NE – Death/Conception

Again, these examples are by no means set in stone; rather, they are presented as an aid in perceiving a cycle present throughout the natural and human world. One way to summarize these archetypes in the language of human experience might be:

E – Inspiration

SE – Motivation

S – Perspiration

SW – Internalization

W – Celebration

NW – Gathering/re-evaluation

N – Integration

NE – Transition/mystery

Other layers that have been placed over an 8 Shields template by the cultural mentoring community have included:

- Organizational roles (including the roles of a support group called, in Art of Mentoring circles, an Acorn.)

- Knowledge-of-place "curricular" elements

- Stages of long- and short-term learning processes

- Facilitation flows of an event or course

- Stages of rites of passage and initiations

- Skill flexes for being in service in community*

***

Gaia U Associates

Read here, on the next page, the handout prepared for people taking support roles in an Art of Mentoring gathering.

What vMeme-plex would you use to characterize this approach?

Acorn Roles

For ALL: Your best preparation is to connect with the archetype of the direction in your own land, in your daily life now. Also, build relationship with your role double or the person on the other end of your axis (e.g., north-south). Initiatives and ideas you have to fulfill your role should be run past the north, especially while finding your feet as a team. The north will be liaising with presenters/ facilitators.

###A full context for a leaderful culture

	Before Programme	During Programme	Basic layers of medicine wheel
NE	-obtain supply of smudge -ponder tricksy activities, what can you do to bring appropriate/kind mischief? - consider - how can you expand people's awareness and your own?	-keep areas smudged as appropriate -share gratitude and invite others to (eg. Blessing food, thanks for safe arrivals etc) -hold space for ceremony in personal lives -play helpful tricks – dance with the sacred and profane -help expand senses	Predawn Late Winter Germination Death Imagination / connection to unseen Peace of mind
E	-make nature names, directions, clans -gather any materials for arrival activity	-Provide welcoming, connecting energy -be on registration with 'south' -have an awareness of if people are feeling included particularly anyone with a disability or other 'difference'. -facilitate people getting to know each other (name games) -create methods of connecting people, secret missions -organise wake up song -help create inviting atmosphere that people want to join in transitions, circling up (songs etc) -Announcements to group	Sunrise Spring Sprouting Birth Inspiration Inclusion good message

SE	-travel / arrival logistics / directions / signs -help acorn identify personal motivations, passions: why are you coming, what you want to give, receive.	-represent child's passions. Help people play through role modelling -support E in bringing this energy to transitions -see where people are blocked or energy is tucked, can you help it move with playfulness, a zest of energy? -mentoring / life coaching is also a SE quality – sometimes you can bring this more mature approach to helping people move through things. -lead land / maps orientation -Transport coordination with South.	Mid-morning Late Spring Rapid External Growth Childhood Orientation Moving through blocks Healing
S	-help ensure materials required will be there -be filled in on who is arriving for registration/enrollment	-registration, enrollment, paperwork -gracefully help keeping time agreements, get participants on board with crow calls etc, gathering with song etc. -help everyone be aware of timings and the flow of events -have an awareness of what needs to happen and fitting everything in, help speakers/activities not run over at the cost of other content -look for logistical gaps – are details covered? Be pro-active, ask questions. -Transport coordination with SE -record each day what happens, so that we have a record of the schedule as it unfolded for future ref and evaluation	Noon Summer Flowering Adolescence Perspiration Honour agreements Unity and integrity
SW	-SW of Spaces – ensure spaces are prepped before arrival of participants (fire stoked, blankets, pillows if available) -SW of Body, awareness of rejuvenating bodies, tending physical needs upon arrival - help other staff to self care	-role model 'taking care of yourself is taking care of your community' -awareness of if there are unmet biological needs within the group -be the voice of rest and sustainability, sit spot time. -SW of Food – co-ordinate volunteers of participants for meal prep/washing. Liaise with R4 kitchen coordinator. -SW of Spaces – bring awareness to the group of need for beauty and practicality eg keeping wood/kindling supply - suss out the body workers / martial artists etc, how can you facilitate them to bring those gifts to the group? -Med kits / first aid station	Late Afternoon Late Summer Internal Growth Early Adulthood Relaxation Tend nature connection & well-being Peace of body
W	-role modelling appreciation of others, encouraging group appreciation moments (in acorn meetings prior and with whole group during program) - research lineage / language of any songs you wish to share - get familiar with schedule / content of week	-gather the group mind -support E in helping transitions happen smoothly and enjoyably, you're completing the transition and setting the stage for facilitator -create spaces to invite other participants to step up and hold pieces as appropriate, leading songs, telling stories, honouring . MC-ing. -Songs! hold the centre on music being present!	Sunset Autumn Fruiting Adulthood Celebration Appreciations & good message Peacemaking

NW	-Do what might help the programme be connected to THIS PLACE and its history in your own way… -Introspect on the topic of elders. What is an elder? Why are they important to a culture? How can valuing elders work in modern society? How can olders be valued even if they aren't elders? … -Consider grief – sources and ways of dealing with it. Consider ways in which it may arise within the program and how to pre-emptively address it. Contemplate how reintegration can be addressed/eased	-Hold space for elders -observe the group, where is the group mind at, what energy would be helpful to move into -is anyone having a hard time emotionally? -help create space for sharing of reflections, story of the day - honour ancestors	Evening Late Autumn Decay Late Adulthood Decomposition Inner tracking & grief tending, Inter-generational healing
N	-Make sure schedule is created and other directions understand/have the resources they need -organise and facilitate acorn meetings -help acorn connect, share intentions, understand roles, feel supported, open Q&A time, fun is had!	- Be one step ahead with presenters & wests on content & intention of each day -Support other acorn members to bloom -Ensure there is continuing understanding of roles and that needs are met -Observe tone/needs of group, be the silent wind of change as needed -Help navigate issues if they come up -Resolve conflicts. - strive for group consensus and be willing to make final decisions when needed. - stay in bigger picture balancing all with the whole always in mind	Midnight Winter Seeds Elderhood Integration Unity – consensus Cultural design, Protect the central fire

A full context for a leaderful culture

It is important to see leadership in the full organizational context.

This includes:

- structures (typical arrangements for reporting from functional units and/or other areas of responsibility). See the Viable Systems Model in the link below the books for a map of key functions.

- organization culture (the vMeme center of gravity) of the worknet and it's systems. See the video in the link below called "about agile that uses the Laloux framework (derived from Spiral Dynamics)"

- policies in use and,

- the vision and mission

Dynamic Governance[200](known originally as Sociocracy but re-named without socio in the title to avoid spooking people from

[200]http://www.governancealive.com

the USA who are often restimulated by social = socialism = un-American) is one example of an almost whole system that speaks to most of these aspects by invoking the principles listed below.

Compare Dynamic Governance (orange/GREEN/yellow?) with Holacracy[201] (based on very similar principles, honed in the agile software development field – possibly orange/green/YELLOW? Your opinion is sought).

Dynamics Governance is open source and more available than Holacracy (which is a proprietary system). Gaia U is using DG/-Sociocracy, and Gaia U Latina is running an online training in Sociocracy for the all Latin American integrating network known as CASA Continental. This is an upcoming governance technology.

Add The Viable Systems Model (VSM) to either of these to check that the organization has all the systemic functions needed. No amount of well-organized governance will make up for a missing function.

Principles of Dynamic Governance

According to the originators: The primary objective of dynamic governance is creating a harmonious workplace, not just because harmony is nice, but because harmony is necessary in order for people to work together effectively.

Harmony boosts success, whether that success is measured in currency earned, medicines distributed, or lives saved. By creating harmony, dynamic governance produces successful organizations.

The implementation of dynamic governance makes minimal changes to operations and maximum changes to decision-making, its four principles (below) are simple, but have dramatic effects:

1. Consent
To ensure that organizational policies allow everyone to do their

[201] https://www.holacracy.org

jobs well, policy decisions are made by consent. Consent means "no paramount and argued objections." Objections must be based on how a person thinks a policy will interfere with their ability to do their job and clearly explained so these objections may be addressed and resolved.

2. Circles
Decision-making is delegated to a hierarchy of circles that reflects the operational structure. This allows decision-making to flow through the organization. Responsibility for leadership is distributed so that individuals are included in the decisions that most affect their work.

3. Double-Linking
In the hierarchy of decision-making circles, the membership of each lower circle overlaps that of the higher circle. This overlap — called "double-linking" is accomplished by including at least two people from the lower circle as full members in the higher circle.

The "double-link" includes the operational leader, who is selected by the upper circle, and at least one representative elected by the lower circle. Double-linking ensures communication, participation, and feedback up and down the organization.

4. Elections
People are elected by consent to functions and tasks. The election process ensures that the person elected to a task is accepted by the circle as the best available person to do it, and that the person elected also understands what the task requires and what other circle members need from the person performing the task. This avoids one negative effect of volunteerism in which a person may volunteer to lead in inappropriate contexts (not competent or attentive) or for inappropriate reasons (for example, seeking to accumulate power).

Effects of these principles

According to the Dynamic Governance website, these four principles produce exceptionally strong and productive organizations. Dynamic Governance also uses best management practices, including transparency and integral education, which are enhanced by the dynamic governance structure.

Gaia University is exploring Dynamic Governance to evaluate whether incorporating its principles into our organization is a good progression for us.

The Viable Systems Model (VSM)

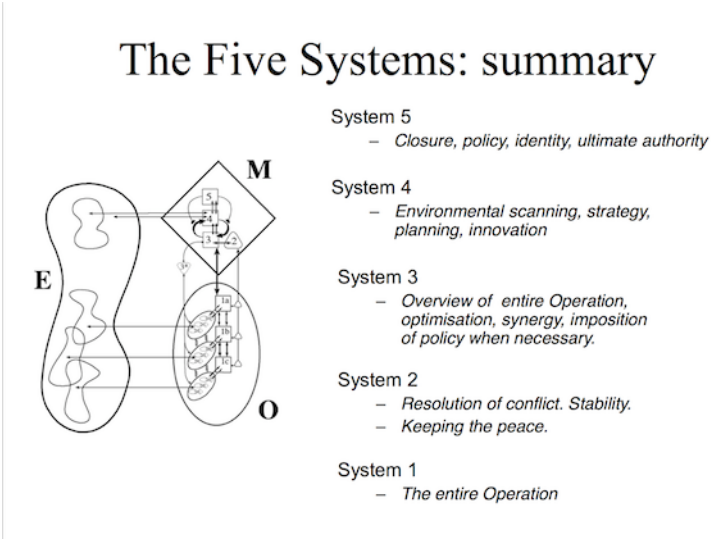
Originating from the early days of cybernetics and operations research, the VSM uses the various systems that are gathered together in human beings to define what functions are essential to an adaptive organization. There are three primary (complex) systems that are, in turn, made up of other sub-systems.

1. Those that sense the outside environment and adapt the organism to the prevailing conditions (labeled E for Environment in the chart)
2. those that go about handling the day to day operations of the whole organism (labeled O for Operations in the chart)

and

3. those that look out for the whole organism making sure that everything is well regulated, integrated and working together. This one consists of three distinct sub-systems making five in all (labeled M for Management in the chart).

In chart form they look like this:



Stafford Beer, the originator of the VSM, was also cybernetician to the Allende Government in Chile that ran from 1970 to 1973 – see this link on Khan Academy[202] for a good background on how this promising, progressive government was toppled with USA (CIA) involvement and replaced by the brutal Pinochet dictatorship (the Pinochet dictatorship is now notorious as the first "Shock Doctrine" government in the world).

Beer built the Cybersyn[203] real-time national management system, a still unsurpassed 'System 3' for an entire country. Real-time feedback is significant as governments commonly work with feedback data that may be months and years older than the actions the feedback is supposed to monitor (by which time it is way too late to "trim" the course of action).

[202] https://www.khanacademy.org/humanities/world-history/euro-hist/cold-war/v/allende-and-pinochet-in-chile?playlist%3DHistory

[203] https://en.wikipedia.org/wiki/Project_Cybersyn

VSM and Dynamic Governance

Dynamic Governance (read also - Holocracy, which dovetails more obviously with Lean Project thinking) could be seen as having a strong System 2 (Resolution of Conflict, Stability, Keeping the Peace) function in an organization.

If organization and governance design are amongst your passions read more on VSM and Cybersyn. There is a VSM presentation attached to this element.

Process Tools of Value

Processes for thinking together

Processes for thinking together and for enhancing collective intelligence

In our second-tier(?) work-nets, businesses, and organizations we have a commitment to the idea of collective intelligence. This notion requires that we use processes that help the collective explore its knowledge and wisdom and bring its full, flexible and multiple intelligences to bear on the situation.

The following snapshots of techniques that can do this are included to tempt you into following them up as time and interest allow.

Designing Productive Meetings and Events

Small-scale, every-day meetings are the bread and butter of many organizations, and they benefit greatly from being designed. In leaderful contexts participation is a key concern (that people get the space and opportunity to contribute).

The manual, *Designing Productive Meetings and Events* (DPM&E), gives a full description of several useful meeting design tools

focused on providing time to think and opportunities to participate. See the manual here.[204]

We already know two of the most functional tools: think and listen and go-rounds. Judicious use of just these two simple-to-understand and simple-to-use tools can transform meetings. Witness our webinars.

Further add-ons provide the meeting designer with a flexible system of methods capable of yielding effective designs in multiple situations.

The DPM&E Manual says:

A Progressive System of Methods

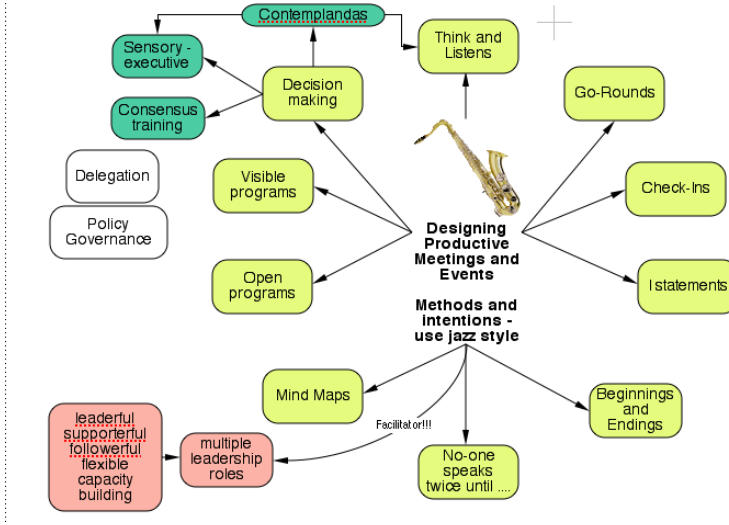
The meeting and event methods described in this manual can be connected to make a wide range of meetings of all sizes and shapes. The simplest methods, Think and Listen and Go-Rounds, are core components of the next highest level of methods, such as Vision Support Group and Constructing Open Agendas.

In turn, each of these second-order methods can be used to generate third order methods like the Action Search described in outline in the final chapter.

The methods chosen for a meeting will depend on the intended function of the meeting, the number of people attending, and the range of abilities to be present.

Inclusive meeting methods can be small or large scale. Two people together can use a Think and Listen to great advantage for a meeting that may take 15 minutes or less. Or the methods can make up designs for events suited to 50 or more people coming together for a whole day.

[204] http://gaiauniversity.org/wp-content/uploads/2017/04/DPMEoriginal.pdf



10 Faces of Innovation

Let's explore one of several ways to think about assembling a team with multiple capacities, in this case, oriented towards human-scale design.

The 10 Faces of Innovation[205] is a system researched and developed by IDEO, an international design consultancy where Liora's son Ari works.

The Learning Personas

Individuals and organizations need to continually gather new sources of information to expand their knowledge and grow, so the first three personas are learning roles.

The Anthropologist is rarely stationary. Instead, this is the person who ventures into the field to observe how people interact with

[205] http://www.tenfacesofinnovation.com/tenfaces/index.htm

products, services, and experiences in order to come up with new innovations.

The Experimenter celebrates the process, not the tool, testing and retesting potential scenarios to make ideas tangible. A calculated risk-taker, this person models everything from products to services to proposals, to efficiently reach a solution.

The Cross-Pollinator draws associations and connections between seemingly unrelated ideas or concepts to break new ground. Armed with a wide set of interests, an avid curiosity, and an aptitude for learning and teaching, the Cross-Pollinator brings in big ideas from the outside world to enliven their organization.

The Organizing Personas

The next three personas are organizing roles, played by individuals who are savvy about the often counter-intuitive process of how organizations move ideas forward.

The Hurdler is a tireless problem-solver who gets a charge out of tackling something that's never been done before. When confronted with a challenge, the Hurdler gracefully sidesteps the obstacle while maintaining a quiet, positive determination.

The Collaborator is the rare person who truly values the team over the individual. In the interest of getting things done, the Collaborator coaxes people out of their work silos to form multidisciplinary teams.

The Director has an acute understanding of the bigger picture, with a firm grasp on the pulse of their organization. Subsequently, the Director is talented at setting the stage, targeting opportunities, bringing out the best in their players, and getting things done.

The Building Personas

The four remaining personas are building roles that apply insights from the learning roles and channel the empowerment from the organizing roles to make innovation happen.

The Experience Architect is that person relentlessly focused on creating remarkable individual experiences. This person facilitates positive encounters with your organization through products, services, digital interactions, spaces, or events.

The Set Designer looks at every day as a chance to liven up their workspace. They promote energetic, inspired cultures by creating work environments that celebrate the individual and stimulate creativity.

The Storyteller captures our imagination with compelling narratives of initiative, hard work, and innovation. This person goes beyond oral tradition to work in whatever medium best fits their skills and message: video, narrative, animation, even comic strips.

The Caregiver is the foundation of human-powered innovation. Through empathy, they work to understand each individual customer and create a relationship.

World Cafe

World Café is a lively and popular process suited for use with large numbers of people. Many tables are set up for five or six people, café style with music, tea…covered with write-on paper and supplied with color crayons. This is the essential kit. People move from table to table on a timed rotation speaking and drawing their answers to a set of questions posed by the organizers. Each table is staffed by a conversation leader.

Here are the 7 World Café design principles and the website is here:[206]

[206] http://www.theworldcafe.com/key-concepts-resources/design-principles/

The following seven World Café design principles are an integrated set of ideas and practices that form the basis of the pattern embodied in the World Café process.

1) Set the Context – Pay attention to the reason you are bringing people together, and what you want to achieve. Knowing the purpose and parameters of your meeting enables you to consider and choose the most important elements to realize your goals: e.g., who should be part of the conversation, what themes or questions will be most pertinent, what sorts of harvest will be more useful, etc…

2) Create Hospitable Space – Café hosts around the world emphasize the power and importance of creating a hospitable space—one that feels safe and inviting. When people feel comfortable to be themselves, they do their most creative thinking, speaking, and listening. In particular, consider how your invitation and your physical set up contribute to creating a welcoming atmosphere.

3) Explore Questions that Matter – Knowledge emerges in response to compelling questions. Find questions that are relevant to the real-life concerns of the group. Powerful questions that "travel well" help attract collective energy, insight, and action as they move throughout a system. Depending on the timeframe available and your objectives, your Café may explore a single question or use a progressively deeper line of inquiry through several conversational rounds.

4) Encourage Everyone's Contribution – As leaders, we are increasingly aware of the importance of participation, but most people don't only want to participate. They want to actively contribute to making a difference. It is important to encourage everyone in your meeting to contribute their ideas and perspectives, while also allowing anyone who wants to participate by simply listening to do so.

5) Connect Diverse Perspectives – The opportunity to move between tables, meet new people, actively contribute your thinking,

and link the essence of your discoveries to ever-widening circles of thought is one of the distinguishing characteristics of the Café. As participants carry key ideas or themes to new tables, they exchange perspectives, greatly enriching the possibility for surprising new insights.

6) Listen together for Patterns and Insights – Listening is a gift we give to one another. The quality of our listening is perhaps the most important factor in determining the success of a Café. Through practicing shared listening and paying attention to themes, patterns, and insights, we begin to sense a connection to the larger whole. Encourage people to listen for what is not being spoken along with what is being shared.

7) Share Collective Discoveries – Conversations held at one table reflect a pattern of wholeness that connects with the conversations at the other tables. The last phase of the Café, often called the "harvest," involves making this pattern of wholeness visible to everyone in a large group conversation. Invite a few minutes of silent reflection on the patterns, themes, and more in-depth questions experienced in the small group conversations and call them out to share with the larger group. Make sure you have a way to capture the harvest. Working with a graphic recorder is recommended.

6 Thinking Hats

The latest release of XMind includes a 6 Thinking Hats template:

This template was made famous by Edward de Bono, developer of lateral thinking. The 6 Thinking Hats, a parallel thinking process, disciplines a group to be "on the same page at the same time" during a design process or problem-solving session. Link here.[207]

The idea is that, whilst, for example, it is crucial that the team spends time quite vigorously critiquing an approach to resolving a

[207] http://www.debonogroup.com/six_thinking_hats.php/

design or problem, it is not at all helpful if this critique is launched before an idea has had time to take shape and blossom. Therefore the team chooses which Hat to wear at any given time in such a way as to enhance a process rather than disrupt it.

Here are the Hats and the key is to use them consciously:



Future Search

A deep, powerful process suited to organizations that can bring all the players together (whole system in the room) for three days of exploring futures histories, collective generation of timelines, priority and project identification and resource allocation.

The Action Search in the last pages of the DPM&E manual is a short form of a Future Search that works for a community group who would be unlikely to have the budget to mount a three-day residential event.

From the Future Search website:[208]



Future search is a PLANNING MEETING that helps people transform their capability for action very quickly. The meeting is task-focused. It brings together 60 to 80 people in one room or hundreds in parallel rooms.

Future search brings people from all walks of life into the same conversation. Those with resources, expertise, formal authority, and need. They meet for 16 hours spread across three days. People tell stories about their past, present, and desired future. Through dialogue, they discover their common ground. Only then do they make concrete action plans.

The meeting design comes from theories and principles tested in many cultures for the past 50 years. It relies on mutual learning among stakeholders as a catalyst for voluntary action and follow-up. People devise new forms of cooperation that continue for

[208] http://www.futuresearch.net/method/whatis/index.cfm

months or years.

Future searches have been run in every part of the world and sector of society.

Open Space Technology

Designed to break the pattern of the classic conference in which participants are really non-participants being fed the party line by talking-heads out front (chosen by the prevailing power structure). Open Space Technology brings people together in an un-conference space where they create a market-place to pitch their ideas for workshops they want to attend and/or to give.

Depending on take-up of the pitches, these workshops may happen or not. OST events can work for up to 2,000 people and are high energy, high creativity events that attract creative participation.

From the Open Space World website:[209]

What is Open Space Technology?

Open Space Technology is one way to enable all kinds of people, in any type of organization, to create inspired meetings and events. Over the last 20+ years, it has also become clear that opening space, as an intentional leadership practice, can create inspired organizations, where ordinary people work together to create extraordinary results with regularity.

In Open Space meetings, events, and organizations, participants create and manage their own agenda of parallel working sessions around a central theme of strategic importance, such as: What is the strategy, group, organization, or community that all stakeholders can support and work together to create?

With groups of 5 to 2000+ people, working in one-day workshops, three-day conferences, or the regular weekly staff meeting, the

[209] http://openspaceworld.org/wp2/

typical result is a powerful, effective connecting and strengthening of what's already happening in the organization: planning and action, learning and doing, passion and responsibility, participation and performance.

Dragon Dreaming

In recent years, John Croft and his Dragon Dreaming approach to eliciting projects, designing workpaths, selecting priorities and having a good time doing it all, has taken the ecovillage world by storm.

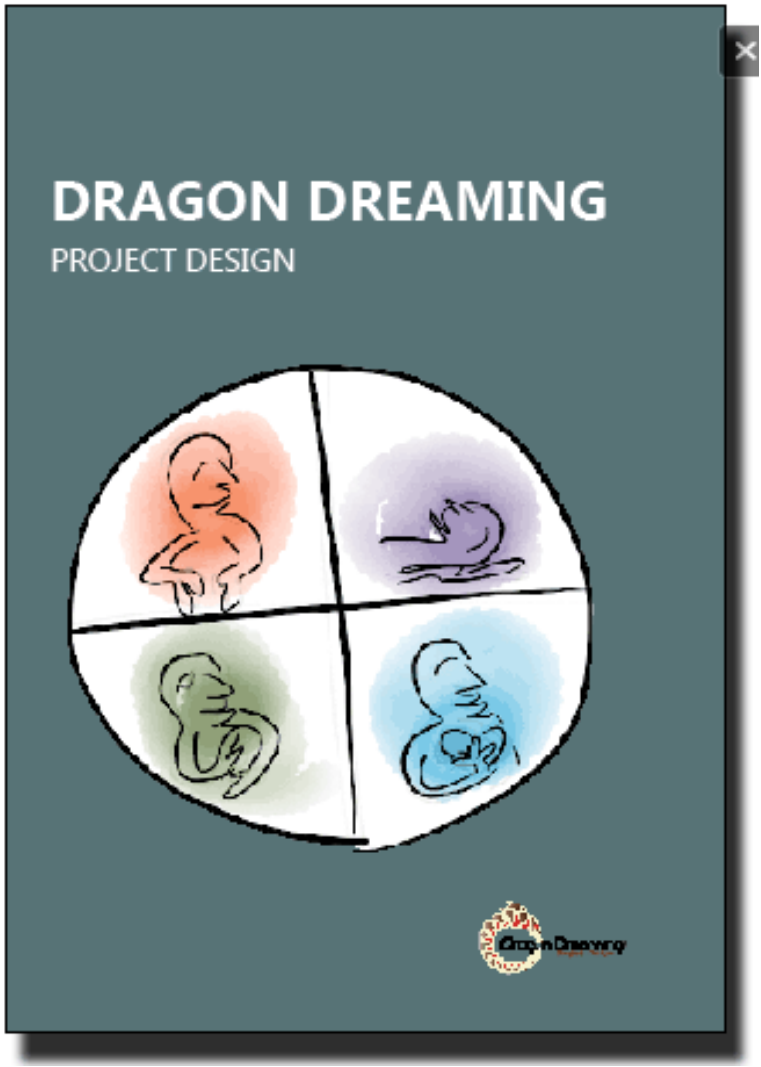
Using a series of phases (Dreaming, Planning, Doing, and Celebrating) and a host of associated tools Dragon Dreaming assists groups to bring individual visions into the group realm where collective intelligence is invoked and greatly assists with generating balance and focusing energy.

Gaia U is experimenting, so far to very good effect, using Dragon Dreaming for our core team project planning events (guided by Grifen Hope of Gaia U Latina who is a trained advocate in the Dragon Dreaming process).

See the overview here.[210]

and get the eBook here.[211]

[210] http://www.dragondreaming.org/dragondreaming/what-is-it-exactly/
[211] http://www.dragondreaming.org/dragondreaming/the-international-e-book/


DRAGON DREAMING
PROJECT DESIGN

Activities: Growing Resilient Communities

In this chapter and the following ones, you have choices about the activities you undertake.

The first one (AR+C&E = active reading plus critique and expansion) is our familiar XMind deconstruction/reconstruction process.

Then select any three from these activities: 2, 3, 4 & 5.

Activity 1-Your AR + C&E evidence

Add your AR + C&E evidence (as an XM*ndMap) to your files. Share as appropriate.

Activity 2-Your meme-plex analysis for the two organizations.

In *The Leaderful Model Expanded* section there are detailed descriptions of the support-person roles for two organizations being 1) the RC Community and 2) the Art of Mentoring Community.

Have a go at using the vMeme language of Spiral Dynamics to propose the meme-plexes visible in the descriptions and write a little about the signs and indicators that you noticed that guided your analysis.

Activity 3-Your story of a "leaderful" flow

The "Fire in the Barn" story tells the tale of a leaderful event that moves through several phases with different vMeme characteristics. Tell a story from your own life that illustrates a dynamic flow

of people acting from leaderful, supporterful and active followerful roles and getting the job done whilst having a good time.

Mark the phases with their vMeme-plex, note the transition moments and show the vMeme-plexes that follow.

Activity 4-Your experiences of leading and supporting

Describe your own capacities as a leader and as a support person and the opportunities you have to practice these roles. Are these roles consciously developed and acknowledged in your group culture?

How have these experiences been (what went well? what was difficult? and what would you do differently next time?).

If you have experience of being supported when taking a leadership role, what difference did that make?

What factors, if any, hold you back from taking more leadership and doing more supporting?

Lay out some long-term goals and visions around the development of your leadership capacities including training-up more support people.

Activity 5-Your responses to the micro-ecosocial enterprise manifesto

In the Possible Solutions section of *The Importance of Leadership* we shamelessly layout a micro-ecosocial enterprise manifesto for the future.

What do you think about this proposal?

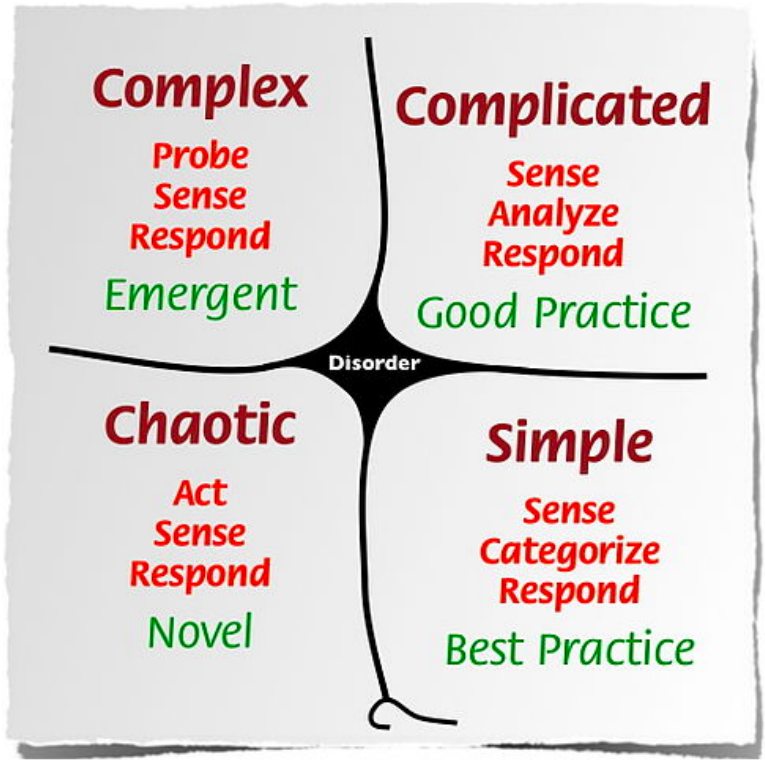
Chapter 7: Project and Design Thinking

Cynefin and the simple complex paradox

Contexts in which we live and work these days

Following our pattern of thinking big, please find the Cynefin model reproduced below. Cynefin, (sounds like "kunevin"), is a Welsh construct, and is roughly (but inadequately) translated into English as "place" or "habitat."

The framework is a very useful attempt to characterize the various contexts (or situations) we are likely to find ourselves in. It also suggests appropriate and different approaches to operating successfully in these contexts (situations).



Cynefin model

Going from lower right to upper right and continuing widdershins (that is, in the opposite direction to the more usual clockwise rotation) the Cynefin framework (see Wikipedia article here[212]) describes five contexts, summarized in the next section:

Cynefin context descriptions

Simple, in which the relationship between cause and effect is obvious to all. The approach is to **Sense – Categorize – Respond**

[212]Wikipedia is one of the marvels of the digital age. However, it needs using with care and attention. See this video for a few clues as to how to do that.

(in that order), and we can apply best practice solutions. Sense means to notice the character of the context. In this case, it's simple. We can clearly identify cause/effect relationships, and best practice strategies will work.

We do need to categorize the situation correctly. Using a permaculture example, we could look at waterlogged ground and, by pushing a meter long stick into the soil to see if it goes in a) just a little or b) sinks right down, and categorize the situation as a) surface water that has overwhelmed the soils ability to absorb the water (stick goes in a little way) or b) the water table rising up from below (stick goes in deep). These two scenarios require quite different solutions and best practice solutions are already known.

Complicated, in which the relationship between cause and effect requires extended analysis or some other form of investigation and/or the application of expert knowledge. The pattern of approach is to **Sense – Analyze – Respond**. We can apply good practice solutions but only after careful, extended, and expert analysis.

Complex, in which the relationship between cause and effect can only be perceived in retrospect, not in advance, the approach is to	: **Probe** (make a small, thoughtful intervention)– **Sense** (see what happens and whether that tells us something about how the system works) –**Respond** using our new understanding of the system:	repeat *5. A best practice approach is much less useful here as "off-the-shelf" solutions are likely to be solving for the wrong problem.

Chaotic, in which there is no relationship between cause and effect

at systems level, the approach is to **Act – Sense – Respond**. A disaster scenario commonly creates a context of chaos in which case we "act" to alleviate immediate needs and, if possible, act in a way that trends the context towards something more stable – complex perhaps – so it is more amenable to strategic thinking.

Disorder(ed), which is the state of utter confusion. In these circumstances, people are likely to respond with panic, and/or withdraw if they can (**revert** to their own **comfort zone**). This is usually not at all helpful.

The Gaia U argument is that we are almost always working and designing for change in situations in which every one of these domains or contexts is alive. We believe that, increasingly, the domains of complexity and chaos are coming to dominate the overall (meta) context. For example with Brexit (Britain leaves the EU), the associated possible Grexit (Greece leaves the EU) and the potential break-up of the United Kingdom we can see what appears to be the emergence of chaos as the crumbling of the previously apparently impregnable neo-liberal consensus accelerates.

Also, as proposed by Naomi Klein, in her important 2008 book *The Shock Doctrine – the rise of disaster capitalism*[213] we see that societies are deliberately pushed into chaos through "shocks" so that unpopular legislation and power gathering can move forward without resistance as the population is diverted with surviving the chaos.

Meanwhile, conventional education is still fixated on preparing people for a world in which the Simple and Complicated domains predominate. (Except, perhaps, in the academic fields of a) Complexity Theory in the Schools of Sciences and b) Cultural Theory in the Schools of Arts and Humanities although the mere fact that these two fields are separated into opposing schools is problematic).

Therefore our work together is to increase our capacities for, in Cynefin terms, Acting, Probing, Sensing and Responding as well

[213] http://www.naomiklein.org/shock-doctrine

as to developing our willingness to step beyond our comfort zones. Anti-fragility[214] (thriving on chaos) is our goal.

Our Gaia U brand of Transformative (of ourselves AND the world) Action Un/Learning in which we engage whilst being supported by a wide array of peers, allies and professionals is designed to help us achieve these aims.

The simple/complex paradox

It is worth sharing this insight from the field of permaculture design here (permaculture design is focused on creating ecological systems that work well for humans and for all other life forms).

Permaculture designs are *complex* systems most definitely. Under unusual conditions such as especially heavy rainfall, prolonged droughts, fires, high winds, and so on, they shift to systems dealing with *chaos* (although advanced designers will seek to buffer against extremes so that they are mitigated towards complex).

However, we have noticed that there is an insight that stretches across simple and complex that goes like this:

Some elements of a design can be quite well known - the design of a chicken-tractor for example. And that the element's relation to other elements – such as the chicken tractor's ability to harness the scratching ability of the chicken for the shredding of leaves and the clearance of soil surface pests from croplands whilst adding fertility – can also be well-known. Therefore the chicken-tractor and its relation to other elements (leaves and cropland) could be thought of (essentially) as *Simple* in Cynefin terms.

This is in no way to denigrate a chicken-tractor. Simple does not mean insignificant…it can be described as a best practice.

However, once we add additional factors such as the slope of the land, movement of water, resilience in the face of random

[214] http://continuations.com/post/51065634453/antifragile-by-nassim-taleb-book-review

weather disturbances, and so on; and, beyond this, how the chicken-tractor integrates to the whole system (including the connection to orchards, vegetable gardens, domestic housing and so on), we can reasonably say the context becomes *Complex*. The possible range and type of connections within the whole system cannot be fully known and predicted.

The insight is this: just so long as we design the *Simple* elements for connectivity to at least three other *simple* systems thereby assembling them into a flexible web, we are very likely to find that our designs can elegantly handle (and generate) much more *complexity* than we could easily conceive of at the outset.

This phenomenon is known amongst some permaculture designers as the *simple/complex paradox* and might also extend to include the chaordic[215][216] way of thinking.

The simple/complex paradox is very helpful because it allows us to confidently design in complex situations by becoming, in the first place, capable designers of **open** *simple* systems. That's a much less challenging goal than becoming a complex systems designer all in one go. Gather multiple designers with experience of designing workable, open and simple systems to create a collective with complex capabilities!

Once more then, the design foundations we are laying in are directly connected with our long-term goals of developing our/your abilities to act with thoughtfulness and good attention across the full range of systems and domains (contexts). Following the Cynefin model we'll call these contexts *simple, complicated, complex, chaotic* and *disordered.*

[215] https://wiki.p2pfoundation.net/Chaordic_Organizations_-_Characteristics

[216] Chaordic thinking was something of a hot topic amongst systems thinkers six or seven years ago, and since then it has almost disappeared. Why that is, is a mystery and if you can shed light on this vanishing trick, please let us know.

Project Design and Management: leaving ADDIE for SAM

Project Design-a hot topic

Latest developments in the field

Project design is a hot field these days. This is partly because old forms of *planning,* that require adherence to a fixed plan and are focused on tightly defined goals, are just not doing the job for people working in complex contexts. Indeed, it is often said that plans (in complex contexts) are out of date even before they are written.

Consequently, many people are doing their very best to transition out of traditional methods that use logical frameworks (often called "log-frames" when used in large-scale contexts) towards successive approximation methods (SAM's).

However, it is important to know about log-frames as they are in common use. Indeed, when we get to the topic "Some Permaculture and Ecosocial Design Processes" you'll find a classic log-frame for smaller projects known as GaSADIE, outlined there.

And, it is worth remembering that a designer with a flexible, systemic worldview (yellow in spiral dynamics) can operate a log frame as if it were a successive approximation method whilst a designer with a worldview containing "one right way" thinking (blue in spiral dynamics) will convert a successive approximation method back into a log-frame. It is all about the way you think!

No system at all

In reality, the most common situation is people using no system at all for working up a design or project. This is lamentable as operating without a system can be less than thorough. This section

is designed to alter that situation for all of us, as when we know what system, method, and approach we are using, and we can speak/write that out (articulate it)-we can follow along and learn from each other.

Logical Frameworks-"step by step" approaches

Please use the links provided to self-forage the "logical" approaches now. Do "overview visits," for the sake of familiarity, as there is no need to learn about these in detail.

Click here for Log-frame[217]

Click here for ADDIE[218]

Note that these methods assume that it is possible to pre-define the goals of the design project ahead of time. This becomes less and less possible, as the situation becomes more complex.

In complex situations, the client (this may be you) will likely not know what is possible and is commissioning the design project to find out. Finding out involves a back-and-forth (iterative) conversation between client and designer. As the designer in this situation, your job is to engage the client in a learning conversation spread out over time.

A better approach may be to use a deliberately iterative process (successive approximation method) to guide the design effort. See the next chapter for examples.

Agile Systems

The transition is towards more fluid and flexible approaches such as Outcome Mapping and SAM (Successive Approximation Method).

[217] http://www.brighthubpm.com/templates-forms/99404-example-of-a-logframe-matrix/
[218] https://en.wikipedia.org/wiki/ADDIE_Model

Outcome Mapping is to Log-Frame (both used in sophisticated large-scale development projects) as SAM is to ADDIE (both use in smaller scale projects).

Meanwhile, recent development in the software design field (agile development) have given rise to new project design languages. In particular, see this Lean Project Design template[219] posted in the Gaia U portfolio site (you will recognize this as a modified version of the Lean Canvas from the Regenerative Livings course).

Ways of thinking alert

Because of our earlier attention to Spiral Dynamics, we could posit that the frameworks presented here will do different jobs depending somewhat on the center of gravity of the thinking of the person/team that is applying them.

That is, an absolutist (Blue) thinker is more likely to use a framework in an unbending and possibly rigid way than a systems thinker (Yellow). They could make a SAM look like an ADDIE. Meanwhile, a systems thinker will more likely mash-up the frameworks so that their version of an ADDIE looks more like a SAM. Ultimately you want to be in the second category and yet starting in the first category will help you practice moving out of the deficient no system at all approach.

Please use the links provided to self-forage these approaches now.

Click here[220] for Outcome Mapping XMind summary.

Click here[221] for SAM

[219] http://portfolios.gaiauniversity.org/view/view.php?t=2IyJKESx5QTRioebaMOq
[220] http://www.xmind.net/m/RBtQ/
[221] http://www.alleninteractions.com/sam-process

The need for change

Arguments for agile systems

Outcome Mapping references influencing boundary partners and evaluating the effects of a project after action has been taken – that is, downstream of the "doing." It does this rather than tying the success of a project to achieving predetermined goals. This approach is designed to be effective in complex situations.

SAM proposes iteration (small, frequent efforts with early prototypes delivered for evaluation) and lightness (avoiding over complication of a design by only providing for the features that are demonstrated to be used at prototype stage).

Some arguments (there are more) for moving out of tight planning and into a more open approach like Outcome Mapping and SAM are:

- as soon as you pay attention to the partners on the edge of your project, your so-called boundary partners, (who you are seeking to influence), you notice that you can hope for change, design to achieve it, and put the effort in. But, ultimately, you have very little control over whether your partners adopt the changes, how they might adapt them anyway, and whether they will sustain the integrity of the ideas

and

- in complex situations where it is largely impossible to predict cause and effect, it is also impossible to guarantee specific results. That is, results will happen but not necessarily the ones the plan was looking for (project managers the world over are deeply stressed when their funding is tied to specific outcomes as they cannot, in complex situations, have any level of certainty that these goals will be met.

- projects that are pre-specified in tight detail tend to embed many features that never get used. The client (this may be you) is likely

to make a wish-list that has all sorts of bells and whistles included that have very little practical value (in the software design field it is sometimes claimed that custom built programs have 80% superfluous features).

The results of these problems (using overly specific predetermined plans in complex situations) are at least twofold. Firstly, project designers will attempt to write high sounding project goals which are actually superficial (and therefore "achievable"), and which sound good so that they can tick the outcome boxes at the end of the funding period (and maybe, therefore, get funding to run another cycle). And/or, secondly, they get on with the real work using open, improvisational techniques and meanwhile fudge the data (creative accounting) to pretend that they are getting the results that justified the funding.

Few people like participating in these pretenses and fictions, especially as they lead to enormous stress and the wasting of resources and so the search for project design and management tools that can cope with complexity is on.

See this excellent blog post[222] that describes a doctor working in chaotic conditions coming to understand the need to transition from log-frames to, in this case, Outcome Mapping.

Transitioning from log frames to agile systems

Making this type of change is not an easy job as many people are inclined to stay with familiar methods, even when those don't work well, rather than face the challenge of migrating to something new. That is, people are often addicted to or stuck in one way of thinking.

This inertia is a major problem in all organizations and requires the organization to foster a long-term commitment to change and development. Each of us can contradict this by cultivating an attitude of mind-flex, of always being up for learning new things

[222] http://www.unpredictable.co/news/2016/10/26/a-complex-story

and being willing to be early adopters whilst always appreciating the value of historical techniques.

Project design and doing as core activities

Designing and doing projects

- is at the core of the Gaia U approach for several reasons, some of which are described below.

- It is through our wholehearted engagement with projects that we come to understand what it is we need to learn and unlearn. Our ignorance is helpfully exposed.

- Projects are always an intervention of some sort in a system and, as our experience grows, we learn how to sense the most appropriate and effective places to make these interventions so that our efforts generate the greatest yields for the least effort.

- Now that the days of full employment have gone, probably for forever, it's likely that we will make our livings by doing projects for ourselves and projects for others, some of which will be paid for. Developing high levels of project competence is, we think, an excellent pathway for lifelong livelihood and great preparation for self-generating livings through making ethical businesses.

- Imagining the transition of human societies to full-scale, ecosocial regeneration as a series of contained yet connected projects (holons)[223] helps us find the motivation to proceed step by step.

This incremental approach also fits one of our guiding notions which is that, although no one knows exactly what's coming in the future, we might at least be able to spot a good next step and by spotting and enacting a next step we change our context for the better and get to know it more. As the context improves and our knowledge of it increases it becomes a little easier to sense each next step and so our progress accelerates.

[223] https://en.wikipedia.org/wiki/Holon_(philosophy)

What is a project? Intervening in a system

We offer three conceptions of "what is a project" in the next two sections.

Conception 1

One potent conception of a project is that it is a **designed intervention in a system**. We came across this idea in the last element about moving communities towards being leaderful.

Acting to alter the concepts around leadership in a community is an intervention in a system. While reading the list below, please think about at what level this strategy (shifting the thinking about leadership) functions.

Donella (Dana) Meadows, one of the authors of the pivotal 1972 Club of Rome *Limits to Growth* report,[224] tells the story of how she was working with the high-level group of officials to look at world systems when she became frustrated with their lack of any sense that they understood that they were looking to make interventions in systems.

Indeed she became aware that they had no systems concepts to hand nor any language to describe the idea of interventions or intervention/leverage points. So she took time out of the group to write up the list shown below. The smaller the number (closer to 1) the more leverage there is when making an intervention at this level.

1. Numbers: Changing constants and parameters such as subsidies, taxes, and standards

2. Buffers: Changing the sizes of stabilizing stocks relative to their flows

[224] https://en.wikipedia.org/wiki/The_Limits_to_Growth

3. **Stock-and-Flow Structures**: Changing physical systems and their nodes of intersection

4. **Delays**: Changing the lengths of time of delays relative to the rates of system changes

5. **Balancing Feedback Loops**: Changing the strength of the feedbacks relative to the impacts they are trying to correct

6. **Reinforcing Feedback Loops**: Changing the strength of the gain of driving loops

7. **Information Flows**: Changing the structure of who does and does not have access to information

8. **Rules**: Changing incentives, punishments, constraints

9. **Self-Organization**: Opening the power to add, change, or evolve system structure

10. **Goals**: Moving the purpose or function of the system

11. **Paradigms**: Altering the mindset out of which the system—its goals, structure, rules, delays, parameters—arises

12. **Transcending Paradigms**: thinking in entirely different ways

This important (and hard to understand!) list describes, in general (systems engineering-like) terms, one scheme of identifying the leverage points for intervening in a system, with increasing levels of leverage as the numbers go lower.

Click this link for more detailed discussion[225] and explanation of this list. There is much to be gained from even a partial understanding of Donella (Dona) Meadows' insightful concepts.

Meanwhile, if you are not familiar with systems thinking, please take a side trip now to develop your knowledge in this area – this online course provided by the Schumacher Institute is worthwhile.[226]

[225] http://donellameadows.org/archives/leverage-points-places-to-intervene-in-a-system/
[226] http://systemslearning.org/systems-learning

Leverage points for interventions

According to the leverage point concept, an intervention at level 4 that is designed to increase the capacity in the system for more self-organization is likely to have a more significant effect than increasing the amount of stock in a holding tank somewhere in the system which would be a level 11 intervention.

Of course, this depends a lot on where you are in the system. If you're stuck at the bottom of a long hill climb and your electric bike has run out of power you'd probably be much more interested in a level 11 intervention (finding a little roadside café with an electrical charging point), than a level 4 intervention (working up and passing local ordinances/laws that make it easy for entrepreneurs to open little roadside cafés with those charging points available).

Nonetheless, the idea of different qualities of leverage for different leverage points is well taken, and it wouldn't take many experiences of being stuck without power (a level 11 problem) to cause us to shift our attention towards making charge points more available (a level 4 solution).

That is, in the short term we are often most interested to resolve **operational** problems. These get us out of trouble at the local level. Yet, if we develop a more long-term way of thinking, we become increasingly focused on creating the conditions that enable/encourage good, adaptable solutions to emerge everywhere – that's **strategic**.

From operational to strategic, an example

Bill Mollison addresses this shift in thinking from "operational" (resolving a local problem as if it is a one-off situation) to "strategic" (noticing that local problems are likely replicated in many situations and so disseminating adaptable solutions over a wide "area" becomes part of the design) in his film *In Grave Danger of Falling Foods.*

In Bill's case he shifts (over time) from cutting a "hole in the forest" retreat for himself (operational – becoming more self-reliant and taking a rest from activism) to creating a permaculture design course that he can teach that will enable hundreds of thousands of people to use his (and David Holmgren's) paradigm-shifting thinking to:

1. become more self-reliant whilst being harmonious with nature, and
2. for some of these folks to teach others to do the same thereby bringing a self-organizing/expanding system into being.

That's strategic AND visionary! Good job Bill!

What is a project? GTD and the Dragon Dreaming approach

Conception 2

Another way to think about the question "what is the project" comes from the thinking of David Allen who wrote the book *Getting Things Done* that we saw earlier in the Managing Time, Managing Promises Element. According to Allen, a project is anything that takes two or more actions. An action in this context is roughly defined as something you can complete in that short period of time you have before you supposed to be doing something else.

This means that projects might be quite small as well as large, may be quite simple as well as complex, and may punch well over their apparent weight.

Indeed our notion of project recommends us to the idea that, were we to adequately observe the functioning of the system in question, we might discover that we can create profound changes in said system by making small, simple tweaks at strategic locations.

Harvey Jackins, author of *Re-Evaluation Counseling,* a technique we refer to a good deal in Gaia U, notices this effect (small, well placed, and/or well-timed projects can have significant influences) and claims that, "small qualitative changes can make large quantitative differences," especially when it comes to humans and their relationships. For example, a small increase in hopefulness can significantly empower oppressed people to take important steps toward social justice.

The idea that we can have big effects with small tweaks in strategic locations is deeply attractive because it promises **maximum effect for minimum effort** [although it implies thoughtful and careful observation over time before the deceptively simple but effective intervention is made].

Permaculture people like this idea because it adds power to our hopefulness that small numbers of thoughtful people doing the right things can turn around an entire culture.

Some people get very good at doing these so-called "mini-max" (minimum effort for maximum effect) interventions and deserve the title "magician, ironist." These are people who hang around apparently doing next to nothing and yet whose presence always seems to make things go better.

Magician/ironist are terms lifted from, with all due respect, the works of Bill Torbert and Dalmar Fischer, particularly *Personal and Organizational Transformations.*

Conception 3

In Dragon Dreaming (a project design system that has achieved significant popularity throughout the Global Ecovillage Network) a project is defined as any planned undertaking designed to meet a goal of specified results within a given time.

Note that this approach is popular even though it has a focus on specific results (and our dawning knowledge of complexity suggests

that many results will be unpredictable) because, we think, it calls for adding a right-brain (creative, intuitive, subjective) layer to techniques that might otherwise appear to be too left-brain (logical, ordered, calculated) for ecovillage cultures.

For example, Dragon Dreaming talks of creating "song-lines," (inspired by the song-line approach of aboriginal cultures) that link projects and sub-projects into coherent threads that have clear beginnings and endings.

Such a process does exist in more conventional project design approaches and is called "critical path analysis." It is not difficult to sense that the process of making song-lines sounds much more fun than finding the critical path. This reworking of old techniques with a significant new creative layer is very helpful.

A further inspiration in Dragon Dreaming is to add a phase of celebration, of acknowledgment of achievement to the whole process which fits well with the spiritual idea of gratitude common amongst people of the new culture.

It is well worth exploring Dragon Dreaming here,[227] at some length, as part of this module.

Developing project design and do capacities

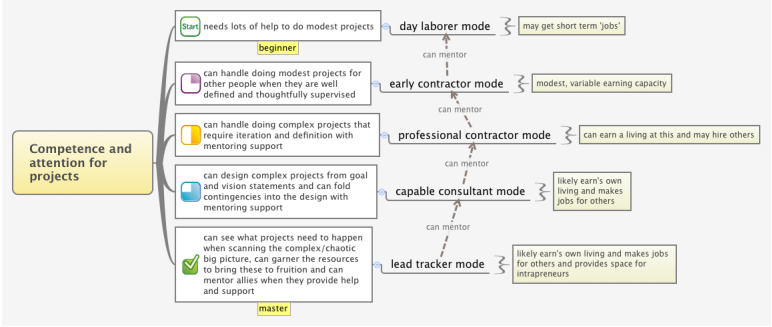
From our experience in the Gaia U community, we see a progression around project competence and attention[228] that is mapped below.

Click here[229] for a full sized version.

[227] http://www.dragondreaming.org/dragondreaming/what-is-it-exactly/

[228] We use a combination of competence and attention to highlight that both need to be present for a good job to get done. A person might be competent to do something well, but is distracted from attending to it (competence without attention) whilst a person might also have the attention (be willing and able to put time and effort to the job) but not have enough competence to get it done well (attention without competence).

[229] http://www.xmind.net/m/qbjk/



It is a Gaia U goal to bring us all to master level in this area.

Becoming a Designer: Why and How...

Why become a Designer?

Andrew writes:

Drawing from a lifetime of experience as a conscious designer in multiple fields (furniture design, work-place and production line layouts, boot and shoe design, organization and relationship design, designing permaculture gardens and farms, designing support networks and communities of practice and now, designing a new form of University), I suggest the following benefits are likely to arise through developing permaculture and ecosocial design skills:

Benefits to becoming a designer

For you, for your liberation, and for your usefulness

The idea that you can become an adept and skilled designer of your own situation/context (regarding at least some of the ecological, social and economic elements) is a powerful tool of liberation.

It can move you a significant distance along the continuum of agency. You can move from being a servant of circumstances towards a more constructive mind-flex in which you actively seek to un/learn how to take charge of everything inside your sphere of influence and make it work for you.

Through this process you get to discover what you can change easily, what will take more persistence and better thinking, and when you need to gather together with allies for additional support (most of the time!). Although there will be some limiting factors that are hard to eliminate, you will be able to think increasingly well about getting traction on removing these.

You are also likely to develop additional needs-based resilience by designing and activating the means whereby you can supply some of your fundamental needs (related to food, fuel, shelter, medicines, friends, shoes, clothing…).

This way you can gain significant degrees of freedom as to how much you participate in mainstream culture; get to feel much less scared about your survival in an increasingly chaotic world; and also know with confidence that you will be a welcome addition to smart communities, because of your practical skills and self-reliant responsibility in generating some of the essentials of life.

For expanding your spheres of influence

Further, as you become more proactive and confident as a designer you are likely to discover that elements in the field that seemed beyond your reach before (outside your sphere of influence and therefore apparently intransigent) are now accessible and susceptible to your influence and the influence of your allies. In effect, your sphere(s) of influence will expand continuously.

For your allies

And, as an ever-developing ecosocial designer, you will have a strong capacity to facilitate other people in their journey from passive acceptor of the status-quo towards becoming a pro-activist,

ecosocial designer and world-changer. You get to assist them to explore their situations zestfully and to see where they can take charge and modify these situations to work better for them.

You will be able to do this by modeling your fresh un/learned ways of thinking, by demonstrating your practiced design skills and methods, and by becoming their ally.

Bill Mollison (see *A Designer's Manual*) spoke to this aspect of design. Modifying our environment – with the aphorism "**everything gardens**" meaning that all species actively modify aspects of their environment, often to increase the benefits to themselves. Rabbits, for example, tightly crop the grass near burrow entrances to have it grow back faster (grass grows faster the more frequently it is harvested) for easily accessible, juicy nutrition that is just a whisker away from safety should a predator appear.

Humans have this gardening characteristic too. Re-awakening it and extending it to the whole of society is a potent aspect of our work.

For the liberation of yourself, your allies, and human societies

Developing a deep ecosocial design perspective will also help you contradict the prevailing view that our current cultures are somehow inevitable, that (for example) war is a to-be-expected consequence of human nature, or that neo-liberal capitalism is the final (and best) means of resolving human needs. Over time you will come to un/learn that almost **nothing** about human society **is inevitable** or fixed.

Thinking as an ecosocial designer will enable you to understand that all the social and institutional threads of current societies have been invented by humans (by which humans and for whose benefit is an essential question here) even if this process is mostly unconscious. Thus *all* these threads are open to re-evaluation and re-invention (by Patrix-free, ecosocial design).

For life on the planet

Your ability to design (with support from your allies) your own situation, that of your community, and of human societies in general towards ecological regeneration is of primary importance at this time in human history.

Climate disruption, peak-oil (and peak-water, peak-soils…) are upon us due to our past ecological destruction and use of fossil fuels.

By your un/learning to become a competent, self-replicating, pro-actionist, ecosocial designer you choose to focus your attention on the restoration of ecological systems together with the transformation of human societies for the benefit of all life on the planet.

For making a living

There is a distinct possibility that your ecosocial design skills, evidenced in your ePortfolio, will be the skill-flex through which you can make a living. How good is that - to have the potential to make a living through ecosocial regeneration!

Conclusion

In summary, developing active and broad abilities as an ecosocial designer and actionist[230] is one of the most potent world-change routes open to you.

Learning to Design

Designing in the realm of the relationship between humans and ecological systems (permaculture) is proving an effective transformation ground for many people.

Why?

One reason is that permaculture arises out of Bill Mollison's long history of observing both ecological systems and communities

[230] An actionist is an activist who focuses on making viable, constructive alternatives to neo-liberal capitalism available to self and others and is less focused on protest.

of (mostly indigenous) humans who had learned to function in synergistic relation with them (that is, humans who have learned to "improve" the function of ecosystems rather than destroy them).

Bill also collected evidence of other, benign human/ecology interactions from fellow researcher/practitioners (Fukuoka, Vavilov…) and, together with David Holmgren, developed a clear **set of principles or patterns**.

Principles and Ethics

Examples of principles are *"minimum effort for maximum effect," "work with nature not against," "optimize edge"* and so on–-more appear in the next chapter.

Bill and David also provided an **ethical framework** (*"Care of the Earth," "Care of People," "Limits to Consumption and Population"*) and pithy guidelines such as *"work out from what's already working well"* and *"prioritize fixing system leaks."*

These maxims and principles are **easy to understand** (although a deep understanding may take a lifetime), are easy for beginners to apply in simple situations (and, remembering the simple/complex paradox is helpful here).

Because these speak to the design of systems that mimic nature, they have a wide range of application.

They also help us go some significant way towards contradicting the profound alienation from nature that most of us experience in industrial cultures. Many people reconnect to nature by becoming skilled at permaculture design work.

The Invisible Obvious

In effect, Bill and David brought into view the complex methodologies and philosophies from (what might be called) the background

of obviousness of the world's historic natural gardeners (indigenous people).

Guidelines in a background of obviousness do not necessarily appear to be significant to the practitioner. After all, they might think, doesn't everyone learn about them through being in the world? It often awaits a sensitized and respectful outside observer to notice the consummate skills in use before these are codified in a way that is meaningful to people who are alien to the field.

Make yours Visible

It is for this reason that Gaia U urges us to articulate our design processes and the patterns/principles we use. By being explicit, we significantly increase the chances that alienated others will understand our thinking/doing and follow our example.

The 10 Cycle Rule

Bill Mollison was also clear that it takes at least 10 cycles working through conscious design processes to begin to feel competent. This guideline has since proved accurate for hundreds of folk, and it is the basis for evidence in various Diplomas of Applied Permaculture Design operating around the world (including the Diploma offered by Gaia U).

What it means is that we all **need to practice**: that is, work at using the processes described in this element until we have a sense of mastery.

We will be making reference to permaculture design as a core process throughout this element.

Permaculture+++ (a term introduced by Nodo Espiral[231] that uses the Integral Matrix of Ken Wilber.

[231] http://www.permaculturaintegral.org

Ecosocial design is an outgrowth of permaculture design that seeks to remedy the possibility that some permaculture designers may mistakenly imagine that transformation of only the material systems of life is sufficient.

Whilst material transformations are essential, so too are significant transformations of the ways people think, the way we act on our feelings, and the way we organize and deliver social and economic infrastructures.

Ecosocial design (also referred to as integral permaculture and permaculture+++) deliberately grows permaculture design into the thinking, feeling, social, and economic organization and infrastructure fields.

If you ever want a job!

The core topic of this element is ecosocial design practice. Ecosocial design means actively reorganizing human activity on the planet so that the twin goals of *ecological regeneration* and *social justice* continue to emerge with ever greater vigor and speed.

Design and its close partner, innovation, are increasingly recognized as crucial elements in the adaptation of (mostly) corporate entities to the accelerating global shifts in their operational contexts.

Design practices are on the increase. There are leading outfits in the field drawing in good revenues by providing design consultancy to corporate clients who see the benefit in calling in specialist design agencies. These consultants are, due to their externality and confidence around being disruptive, less constrained in their thinking by the sometimes all-pervasive culture of "normal" found in many organizations.

This is a fascinating field as it has a great deal of potential to bring more agility into the corporate world. Who knows–maybe they will also bring more ethical behavior – now that would be disruptive!

Hidden in this hope is the idea (conjecture?) that flexibility quite often seems to precede paradigm shifts. Could it be, that through the increasing practice of disruptive design for the purpose of commercial survival, some corporations are preparing themselves for a more profound transformation?

We are not, however, holding our breath and waiting for such an outcome. Our view of the purpose of design is somewhat broader. Re-Evolution might be the best term for the time being. The role of corporations in a re-Evolution will be subject to scrutiny, no doubt.

However, some great resources are developing in the corporate sector and even some that have a genuine interest in what we call ecosocial regeneration. See, for example, the Human Centered Design offerings from IDEO[232] – Liora's son, Ari, works for their Cambridge, Massachusetts, USA Office.

So, if you ever get fed up with life on the ecosocial-regeneration edge, maybe you can use your design credentials to fashion a living in that part of the corporate world ready for innovation. (Perhaps, even, we should start a consultancy…???)

Some Permaculture and Ecosocial Design Processes

Introduction

This chapter and the next[233] are designed to give you an introduction to the topic of permaculture and ecosocial design. They are not intended to be a complete design course. However, what you find

[232] https://www.ideo.com/post/design-kit

[233] These two books are a design in themselves. They are based on the permaculture design maxim, *Design from Patterns to Details,* articulated nicely by David Holmgren, co-originator with Bill Mollison of the permaculture design concept. In this case, the *pattern* is the *design process* represented by GADIE, O'Bredimet and GoSADIMET – three cousins you will meet later. Then the *detail(s) are design methods,* some of which are described in these two books.

here will provide you with a substantial foundation for developing your long-term permaculture and ecosocial design skill-flex.

The framework, or superstructure, is the design process. Several design processes are outlined in the following pages. Once you have an easy-to-remember design process on board, you have a mental closet-rail on which to hang a never-ending stream of methods and approaches.

From Pattern	*to Details*
	Design Method #1
	Design Method #2
A Design Process – contains –>	*Design Method #3*
	Design Method #4
	Design Method #5

There are a lot of chapters in these books. Many of them are pictures with just a few words. Please skim the whole offering to analyze and assess before deciding what to spend your time on (this is designed reading!). Then do it (implementation) and see what you think (evaluation).



The illustration above is from David Holmgren's work. It is invaluable to ecosocial designers. Look at it here.[234]

A profound attitudinal understanding develops for people on becoming ecosocial designers. It is that *in every situation there is a design opportunity:* meaning that as all social and human situations are realities created by us they are open to endless design and redesign. This understanding has (at least) two important implications.

1. We need accept nothing in the way of social reality as fixed and,
2. There is no shortage of opportunity to practice ecosocial design.

[234] http://www.permacultureprinciples.com

Analytical or intuitive processes?

Pro intuition

There is a tendency amongst those of us reaching for a wholistic and creative approach to ecosocial design to dismiss analytical processes as reductionist, mechanistic, pedantic, and old-school.

Instead, we seek to employ sensing processes in which we feel for energies in order to intuit what is attempting to emerge and then go with that. We may find it difficult to (or we may be resistant to) describing our processes as we think of them as somewhat mystical and fear that using procedures or explaining how we work to others might ruin the magic and spoil the fun.

This view is common amongst artists, for example, who emphasize the unknowableness of creativity[235].

Pro analysis

Conversely proponents of analytical approaches, engineers, and landscape architects, for example, will argue that design frameworks with sequenced phases including goals articulation, thorough data collection/analysis, and careful problem definition at the core are essential if design efforts are to be relevant and effective.

Both/And?

We'd best be alert to the *either/or* paradigm that the intuitive/analytical debate reveals and, instead, figure out ways to deploy *both-/and* strategies that draw from both sides of the argument/brain.

Conscious integration of these approaches by the designer helps to gain the advantages of both whilst avoiding the pitfalls of each.

[235]"My experience," (says Andrew), "has been that careful and extended inquiry into how a creative designer thinks and works nearly always reveals a describable process. I suspect that the issue is more usually that we are so un-practiced at observing ourselves when we think and work that we are unable to describe what it is that we do."

Common pitfalls (of which there are many) include, for the analytical way, a tendency to always think inside the box, to apply known solutions irrespective of appropriateness, and to insist on following plans even when they have become irrelevant.

For the intuitive way, pitfalls include the possibility that the designer's intuition is clouded by unresolved emotional issues that give rise to misdirections, a tendency to generate whimsical designs that are impractical, and to conflate mystery with quality. "If I can't explain it then it must be good…"

Once we have help to apply some focus to the topic, we are likely to discover that we do indeed use a process and, most excitingly, now that it is raised into consciousness, we can tweak it for better results or even radically alter it for more drastic effect (thereby we learn to design our design processes). This also means we can help (teach/facilitate) other folk to do the same.

Ways of integrating analytical/intuitive

Permaculture designers have long understood that jumping to conclusions ahead of data collection (the intuitive way) may indeed yield valuable design ideas and yet these designers are careful to park these early ideas off to one side and only deploy them later if evaluation (the analytical way) shows these early intuitions to be valid.

The better method is to collect hunches, inspirations, and ideas that jump into awareness in a "wild-designs" folder and save them for later attention. The designer feels free to develop wild design thinking at any time, without judgment, but is also willing to let go of these notions should they later prove unjustifiable. Frequently the wild designing yields creative lines of thought that inspire designer and client alike.

Permaculture designers are also open to both observing a site from multiple sit-spots whilst allowing their attention to move between

focus and reverie. This opens up the possibility of sensing emergent properties (the intuitive way) whilst also working at making concrete, hypothetical deductions from nature through thoughtful application of prior knowledge of plant and animal successions and behaviors (the analytical way).

The value of templates, cycles, procedures, rituals...

In any case, it is very worthwhile to have a procedure (the analytical way) and/or ritual (the intuitive way) on-hand when commencing a design process. A good reason for this is that we often find ourselves called to design in unfamiliar and complex situations[236].

The Challenge of the Too Difficult Box?

Bill Mollison, pioneer of permaculture design, encourages us to seek design work by asking people to let us work on the projects they have tucked away in their "too difficult" box.

This has proven a successful gambit, and yet, of course, it turns up very challenging projects.

We can find our feet in these otherwise potentially overwhelming situations by working steadily through a templated process, cycle, or framework that enables us to "know what to do" (essentially, gather more data) even when we have no clear idea what will emerge.

Goals articulation, survey, and analysis phases, often allow the situation to reveal the underlying shapes and patterns in the context that then provide us with strong clues as to what to do next.

Below is an analytical pattern used in a survey phase for a typical permaculture land-use design. Gathering this information fre-

[236]permaculture designers know that each and every design situation and context is unique and thus worthy of fresh thinking. Because of this, Bill Mollison once quipped that he often suffered from *vüja dé* (rather than déjà vu), the convincing sensation that he had never been in this situation ever before, and thus he never felt like he knew what he was doing! Good call, Bill.

quently allows the site to "speak for itself" so that subsequent choices around the placement of elements "make themselves known."

The Pattern

When working on land-based designs collecting the following data (making a survey) is bound to be of essential and significant value.

Therefore survey for :

1) Slope, sectors and aspect,

2) Soils and water,

3) Microclimates,

4) Existing vegetation and

5) Current patterns of use in relation to zone and sector analysis.

Without this data and an understanding of its significance, we might (and here follows a true-life example) locate village housing on precious and limited good growing land (in this case the silty, river soils). And meanwhile site the community vegetable garden on pure, alkaline sands deposited when the land was once seashore that will forever give us difficulties and immense amounts of work around adequate plant nutrition and water retention.

What might such templates/procedures/rituals look like? In the next chapter, we will look at one commonly used in permaculture designing in some detail and also look a little at other approaches to design.

Frameworks, cycles, and templates

Since the 1980s, a favorite fireside activity for permaculture designers has been to design - design processes (also known as frameworks, cycles, templates, rituals, models and, probably, other names). Most of these are modifications and extensions of processes

also found in such fields as production engineering, landscape architecture, and product design.

Tendencies to Silo Thinking

However, it is often the case that each field is ignorant of the models used by others and may even propose that any other model than their own is a travesty. Such is absolutism!

This is a shame as the multiple existences of such cycles, processes, templates, and models across fields might alert designers to the possibility that there is common ground between them after all and that maybe they could integrate their thinking.

Breaking down the walls of these habitual silos (which we also find big time in government departmentalization, conventional university departments, schools, and in other large-scale bureaucracies) is no simple matter.

As permaculture and ecosocial designers, we have the chance to integrate and eclecticize (integrate from many sources) before the silo habit has become institutionalized in our organizations, but we need to watch out for it as the separation tendency is deep-coded in us through the Patrix. It is just possible that we might unwittingly reproduce the same old patterns of dis-integration.

Mash-ups and Repurposing

The processes described here are designed by people based on years of experience.

However, you can pull them apart, add bits, leave bits out, do them in different orders, run them fast with rapid prototyping, run them slowly with painstaking thoroughness, and otherwise manipulate them creatively. Mash them up and repurpose to your heart's content. The key is to be conscious of what you are doing and to be able to articulate (and document) what went well, what

was challenging, what you would do differently next time, and evaluating if your choices were good.

A Family of Processes

The first process we present is **GADIE** (an acronym generated by USA permaculture designer Dave Jacke – author of *Edible Forest Gardens*[237] with Eric Toensmeier - as the first model at the framework level.

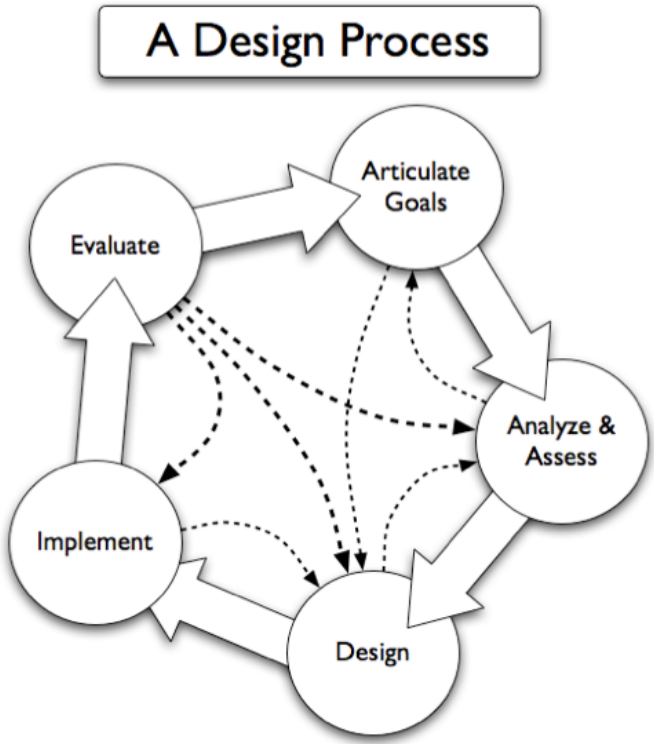
You will notice that developers of these models like to have the acronym read like a sayable word of some sort so that it functions as a mnemonic (that is, you can remember it more easily).

Then we see **O'Bredimet**, another model that is popular in the UK. It is, unsurprisingly, very similar and yet, as is the way with these things, sheds a different light on the topic. And for extra thrills, we invented **GoSADIMET** which combines elements of GADIE, O'Bredimet, and SADI (SADI is one from the UK school of landscaping). This is to give you a taste of the fun to be had improvising your own. Subsequently, we provide leads to other approaches to design, specifically Pattern Languages and Appreciative Inquiry.

Note that design thinking (of products, projects, software, and much more) is a current hot topic so there are lots of resources appearing that can help (and add confusion!).

[237] http://www.edibleforestgardens.com/about_book

GADIE in a graphic



The stages/phases/modalities:

G= Articulate **G**oals or, as some folks prefer,
Goals Articulation
A= **A**nalyze and **A**ssess
D= **D**esign
I= **I**mplement
E= **E**valuate

Note that the stages are arranged in a cycle or spiral so that the process never ends. What is implemented is evaluated which then leads to the emergence of fresh goals. And note the intricate web

of interconnection that shows, for example, that an analyze and assess phase may be designed itself and, as another example, we might design how to implement the design stage…

GADIE explained plus a roundup of permaculture design principles and more

There is plenty to learn and know about design (see here for an engaging read[238]). Yet we are confident that, as nine-tenths of the designer's skill resides in being able to work confidently and flexibly through a chosen framework like GADIE (thus allowing the design to emerge, almost without effort), you will make big gains from applying the fresh knowledge you can get from this section.

Scope

One additional layer around doing designs that we have not addressed here is the intended scope of the design.

By scope we mean: is the design intended to provide the client with a stimulating package of sketches from which they can choose a concept or two that they would like to have you work up in more detail? This is a common requirement, and the scope of this type of design is to present a menu of possible approaches…

This is a **Concept Design** and it might be quite cheap and cheerful (for example you may well deliver this face-to-face over the kitchen table, sketching as you go, before you leave from doing a site visit and a modest survey).

[238] https://emergentbydesign.com/2010/01/14/what-is-design-thinking-really/

This *Concept Design* is often followed by the thorough working-up of one or two options in which you draw out a strong "artist's" impression and estimate approximate costs of installing the alternative designs, work up a timeline for the design to come into yield, and calculate the likely value of these yields.

The scope of this second level of design is to present a worked-up analysis of the feasibility of various options and might be called a **Feasibility Study**. It will be a substantial piece of work that the client will subject to robust critique.

You can see from this description that design is an *iterative process.* It requires the designer and client to design and process feedback, re-design and feedback, re-design and feedback some more, and so on until such times as both parties are satisfied to go ahead and create the plan for the installation of the proposals.

It is never possible to create a design that is installed just like you have it on the drawings. Both you and the client should know that many contingencies will turn up as you go about the installation and that each of these may push and pull the design in a direction different from the details you had on the drawings.

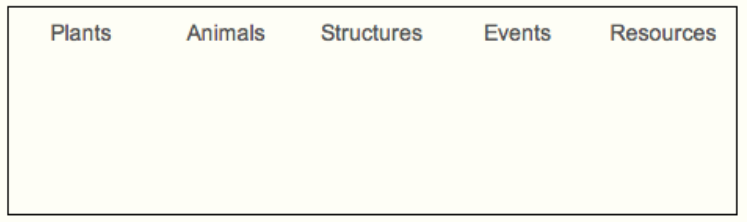
After the *Feasibility Study* phase, comes the preparation of design drawings, schedules, and quantities for the chosen design that are sufficiently detailed for you, the client, and any contractors that might get hired to install the design, to work from. This may require a bunch of extra information about, particularly demanding details. This is a taxing area requiring significant precision and patience. We might prefer, in the first place, to keep our designs small enough and/or self-contained enough for us to install them without too much of this "delegating" type of work.

Gather Goals, Analyze and Assess

G = Goals Articulation

A process designed to help all the people in the client group speak out their goals and visions for the design site.

It may use methods like brainstorming sessions, story-telling, and back-casting (telling stories as if from the future), generating user scenarios, using forms to stimulate thinking. (The PASER sheet below encourages people to think of the Plants, Animals, Structures, Events and Resources that come to mind when thinking about land-use situations and is used by permaculture designers – the question asked is "what specific varieties of each category do you want to see in the final design").



PASER Sheet instructions: Please pin this to the wall in the common room and invite everybody to fill it in.

Thanks to Lea Harrison – pioneer permaculture designer of Australia

Recently popular with ecosocial designers is the holistic goals process embedded in Holistic Management.[239]

Speaking Goals and Visions

It is not always easy to have people talk about their long-term goals and visions. For many people, this type of activity feels somehow illegal, as if they are not allowed to dream. Part of the designer's work may be to assist people to reclaim their power in this respect.

[239] http://www.purplepitchfork.com/uploads/4/2/5/9/42595701/doc_goal_formation_packet.pdf

The Gaia U four questions used in conjunction with think and listens and go-rounds are very helpful for this (times in brackets are suggestions and double time on visions is deliberate):

1. What is going well in your life? (3 minutes)
2. What is challenging? (3 minutes)
3. What are your long-term goals and visions? (6 minutes) and
4. What are your next achievable steps towards these goals? (3 minutes)

A = Analyze and Assess

Methods in use during an analysis and assessment phase are chosen to reveal useful data.

For example, in a work-flow situation, we might follow a farmer around over a couple of days and record where she goes and how often.

Then we might draw up the farmyard to scale on paper, fix the drawing to a cork board, and add pins at each location visited. Then, using a thread, we can map out all the journeys, making them visible as a string diagram.

This will show us the more common (many threads) and the lesser routes (fewer threads), and we can readily see where re-zoning the work area could possibly reduce the amount and the length of some journeys (and hence the time and effort involved).

Our string diagram helps us **analyze** the work pattern, and it helps us **assess** the priorities for attention. That is, if we can easily shorten a journey taken multiple times during the day, we'd make a more effective design than if we shortened a journey that happens only once in a while.

Another method, for thinking about what goes where regarding plants, animals, structures and so on is to **analyze** the soil types, and their locations and **assess** their value for alternate uses. For

example, deep, loamy soils below a spring-line suggest gardens; tough and free draining soils capable of bearing loads even in wet weather suggest roads, collecting yards, buildings, and such like.

For working on rainwater harvesting we could **analyze** the site for areas of impermeable surfaces (roofs, roads, yards, rock faces…) good for rainwater catchment, measure the square area of these, gather rainfall data and evaporation data, and then **assess** what volumes of water are available for harvesting.

Then we can **analyze** some possible uses of water that meet some of the goals derived from the Goal Articulation and **assess** how much storage we need to achieve those goals. That will help us when we come to think about where to place the water storage and what to make it out of (which is **design** – see the next section).

The goals articulation process is also likely to have helped us to generate a list of **elements required** in the design. A compelling **analysis and assessment method** is to list the characteristics of each element according to the categories: inputs (needs), outputs (products and behaviors), and intrinsic characteristics.

Then we **design** to ensure that as many inputs needed are met from within the system, all products and behaviors are accounted for and that we choose an element with intrinsic characteristics that are adapted to the site.

Quoting Bill Mollison: *"Analysis of these inputs and outputs is crucial to (generating) self-governing designs. A deficit in inputs creates work whereas a deficit in output use creates pollution."*

These are significant understandings

There are tons of methods for **analyzing** and **assessing** the situations we find ourselves designing in, and you will need to **analyze** and **assess** the methods themselves to see if they are suitable.

Working in a wide range of contexts and working with experienced designers is very helpful for extending the range of methods we

know about. We are free to **design** our own adapted to the context and the information we are seeking to uncover.

Data collection and analysis as mutually informative processes

It is beneficial to be close to the context (on the land, in the neighborhood, in touch with the client group) especially during these stages of the process.

As we gather information and data (from the Goals Articulations and from observing and surveying the context) so our lines of inquiry are likely to multiply. And, as we start Analyzing and Assessing all sorts of new thinking is stimulated.

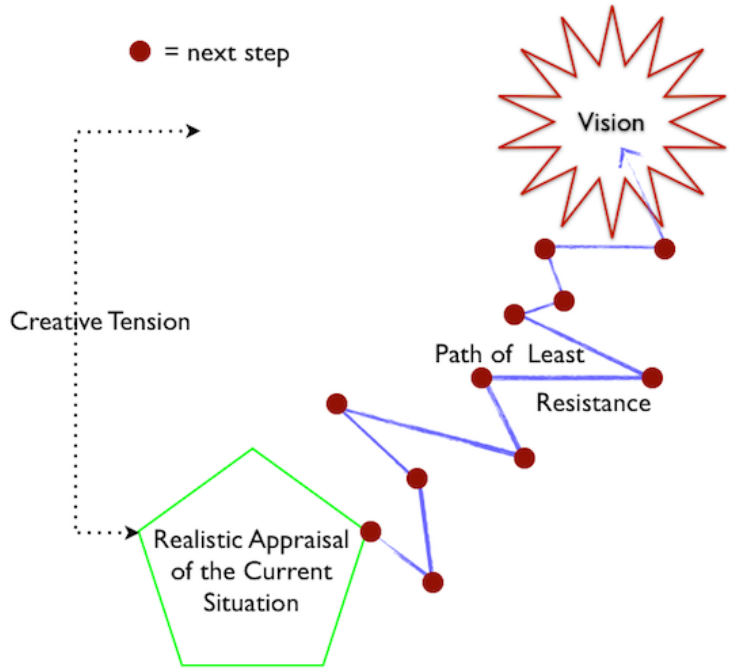
Thus being able to readily revisit the context and the client to follow up leads is a major boon. This way the design is more readily able to emerge from the processes…

What just happened (Structural Dynamics)?

It is worth taking a break here, early in this explanation of GADIE, to ask "what just happened"? Let's visit another design model that might explain that.

What just happened is that, in the Goals Articulation and the Analyze and Assess phases, we articulated a vision and also made a realistic appraisal of the current situation. It happens that Robert Fritz, the artist/musician, used almost identical terms to summarize his own research in which he interviewed creative artists to have them reveal their processes.

Here is his summary model:



This model has some fascinating features.

It proposes that there are two primary zones of focus. One is the long-term **goals and visions** and the other is a **realistic appraisal** of the current situation.

The difference between these two creates a tension, a kind of dissonance that sets the designer's subconscious working on the task of resolving the gap.

The provocative implication of this idea is that we need to focus less on working out how to get from one place to another and more on generating the creative tension between the two contrasting end-states. Then our subconscious will find the route for us.

The method for creating this tension is to pay increased attention to the vision and to the realistic appraisal in turn.

The second insight is that each step we take on the way between the appraisal and vision *changes* the context. Therefore, a new design is required at nearly every moment if we want our next-next step to be relevant.

It is well worth thinking of design in this emergent way. Whilst we may have a sequence of steps that we have planned to take to unfold the design, we need to remain open to the possibility of abandoning plans (in their exact entirety). Instead, we might need to improvise, albeit within a sense of where the design is headed for.

The Path of Least Resistance[240] also refers to this as an "improv" (improvisation) approach and suggests that we can look for routes that are do-able, with ease and grace, rather than those that have us struggling to keep to plan.

You can, of course, choose your approach according to whether you are seeking to challenge (contradict) and/or reinforce your usual tendencies. For example, some of us go so much with the flow that we seem to have no purpose, no vision. In this case, more structure and more goal orientation may be beneficial;

Others of us are so goal oriented (fixated) we fail to notice emergent properties and insensitively grind out the original plan. Less structure and less goal orientation may be precisely what's required.

And some of us are so stuck in a realistic appraisal mode that we're paralyzed with depression so getting our attention out by acting is a possible good cure.

And others of us are so dreamily into the vision we can't get it together to act at all, and some grounding in *doing* may help a lot.

[240] http://www.robertfritz.com/wp/principles/

Design: A First Look

D = Design

Now we get to work out options for what goes where, how each element in the design connects and relates to others, how the dynamic flows of resources passing through the situation will be handled and harvested, and so on.

Preparation is 9/10s of the job

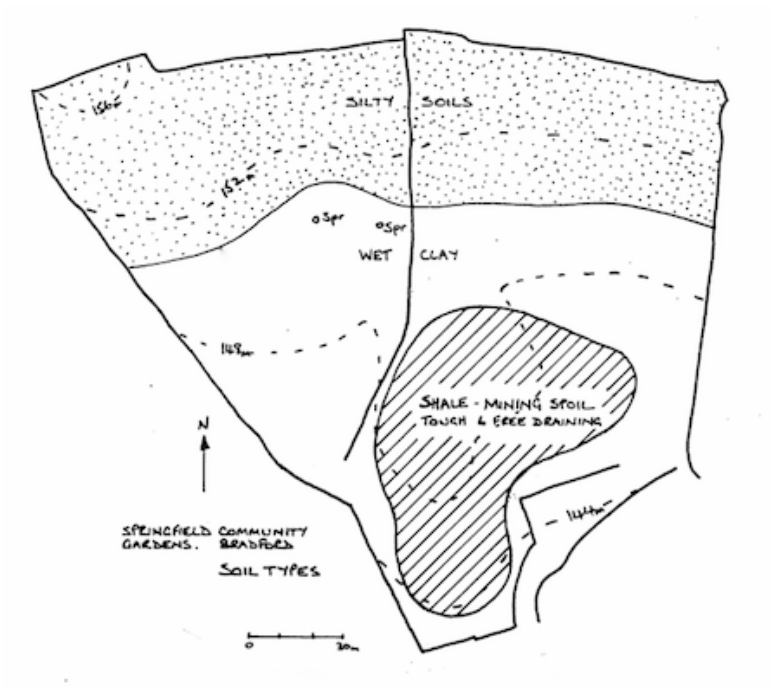
The proposal is that the design phase is made very much more straightforward when it's preceded with thorough preparation. In that respect design work has a lot in common with painting and decorating. As Andrew's dad (father) used to say (irritatingly as Andrew thought then!) when we were contemplating changing the decor in our house *"preparation is 9/10ths of the job"*. He was right of course, and it's the same with design work.

The preparation we do in goals articulation and analysis and assessment makes a big difference as then the design starts to show itself without us needing to "come up with it."

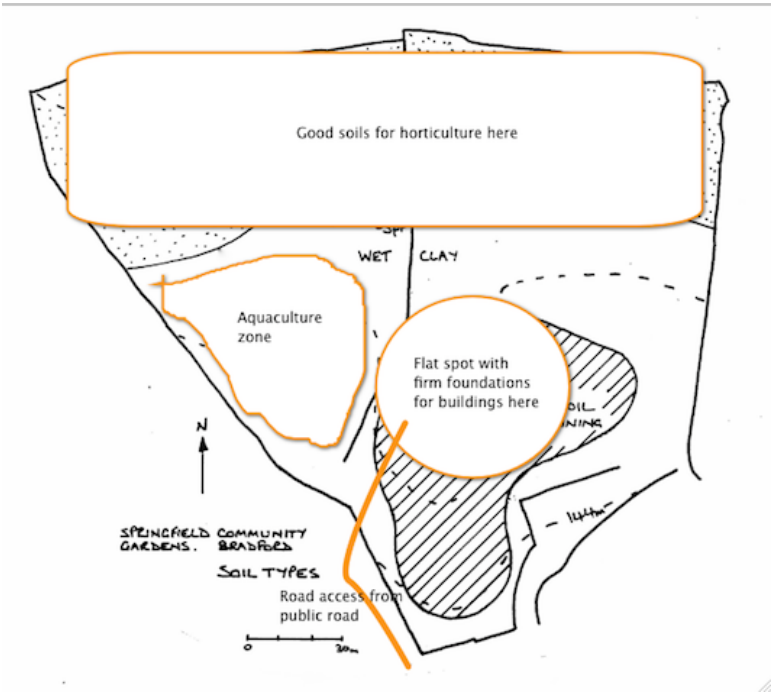
See this example of a piece of land, analyzed and assessed according to, amongst other things, soil type.

This was a design job for a public agency client who was looking for extensive horticultural gardens, a common house, an access road, and an approach to productive use of the significant quantities of water that ran over the surface of the land during the wet season.

Here's what the analysis showed:



Given a little more information (nearest public road) you can see that the site "designs" itself in general terms as follows:



Design: A Second Bite of the Cherry

Beauty and order

We will also be paying attention to beauty and order as we have a keen interest in our designs generating lovely, organized results. Both beauty and order aid good use whilst disorderly, ugly designs encourage thoughtless, uncaring behavior.

However, in permaculture design work, we have consistently held that form (what it looks like) should follow function (how it works) on the grounds that something that works well is likely to look good too.

See this article about the Bauhaus[241] for more on this topic.

It is certainly true that we would want to contradict the obsessive tidiness disease that afflicts some people around gardens and yards.

It sometimes seems that these wealthier folk arrange for a ready supply of cheap immigrant labor just so they can have people work for hours. Blowing leaves about into piles or raking bare soil to make pretty patterns or mowing grass in elegant stripes, all of which activities decrease the capacity for soils to recover and for gardens to produce anything practically worthwhile.

Mind you, there is a strange phenomenon around changing perceptions of beauty and order that pops up here. Andrew remembers that as a teenager on the farm, for example, he loved the appearance of a seven-acre field after spending a couple of days roaring up and down with the tractor, turning the soil over with a three furrow steel plow. He could really get into making a tidy job of it. Now that he knows more about soil life he sees the same sight as a raw wound in Mother Earth and much prefers to see deep mulches and covered soils (which, of course, function much better).

What this means is that we all need to adjust our perception of beauty over time so as to appreciate the loveliness of systems that are functioning well rather than those that conform to a standard of good looks that is derived from the endless, time and energy consuming, activities of constant grooming.

Making design thinking visible

Anyway, the design stage is all about testing and prototyping ideas on paper, taking walks in the woods and allowing inspirations to come, imagining how proposals will work by using them in our heads, making adjustments to placements and connections, refreshing whole lines of thinking entirely and drawing, mind-mapping, drawing, diagramming, drawing, and drawing.

[241] http://www.archdaily.com/225792/the-bauhaus/

We emphasize drawing here for several reasons. One is that the act of drawing involves the whole person and so all of our intelligences are able to integrate whilst we are putting pencil to paper.

A second reason is that it forces us to pay attention to scale. From this, we can see where we are making unreasonable assumptions about space.

Thirdly we can use simple drawings to communicate ideas to clients. It is even better when the client and the designer do drawings together, however basic, as a form of brainstorming and concept clarification.

We can also build models, take sticks and string out onto sites to mock-up possibilities for ourselves and clients to see (for pathways, to frame views out of possible windows, mark where dams and spillways might go…), make 3D drawings using computer programs and do fly-throughs, birds-eye views and more.

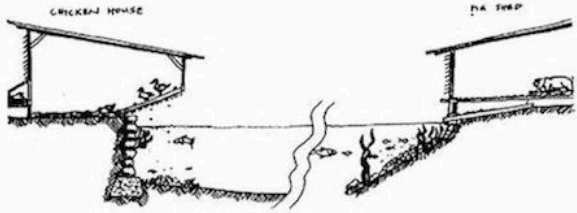
Much can be learned about design through looking at illustrative images of design principles. The next several sections contain such images, some with a little explanation, drawn from the permaculture design field. Enjoy!

Permaculture Design Principles: Relative Location & Microclimates

Design Relationships

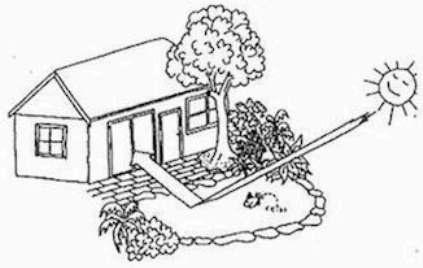
Relative Location

(Source: Introduction to Permaculture, by Bill Mollison and R. Slay, p.160)



Widely used in Asia, animal manures are used to fertilise ponds. This is easily done if pens are located above the pond. Floors must be slatted so that manures fall into the water.

Microclimate



Using a pond to modify the microclimate. The pond provides two specific benefits:

1. Sunlight is reflected from the water surface to provide extra light for the house.
2. The immediate area around the pond is warmer than the surrounding environment because water looses heat more slowly than air and land.

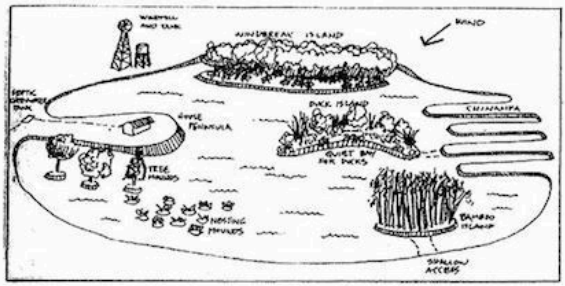
(Source: Earth User's Guide to Permaculture, by Rosemary Morrow, p. 26)

Permaculture Design Principle: Maximize Edge & Succession

Design Relationships

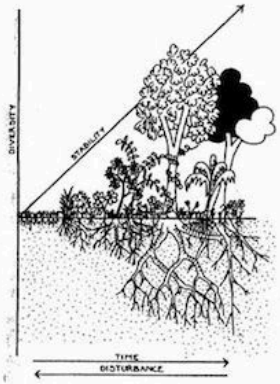
Maximise Edge

(Source: Introduction to Permaculture, by Bill Mollison and R. Slay, p.27)



Useful earthbanks and islands in and around water provide many edges (niches) for plants, animals and people.

Succession



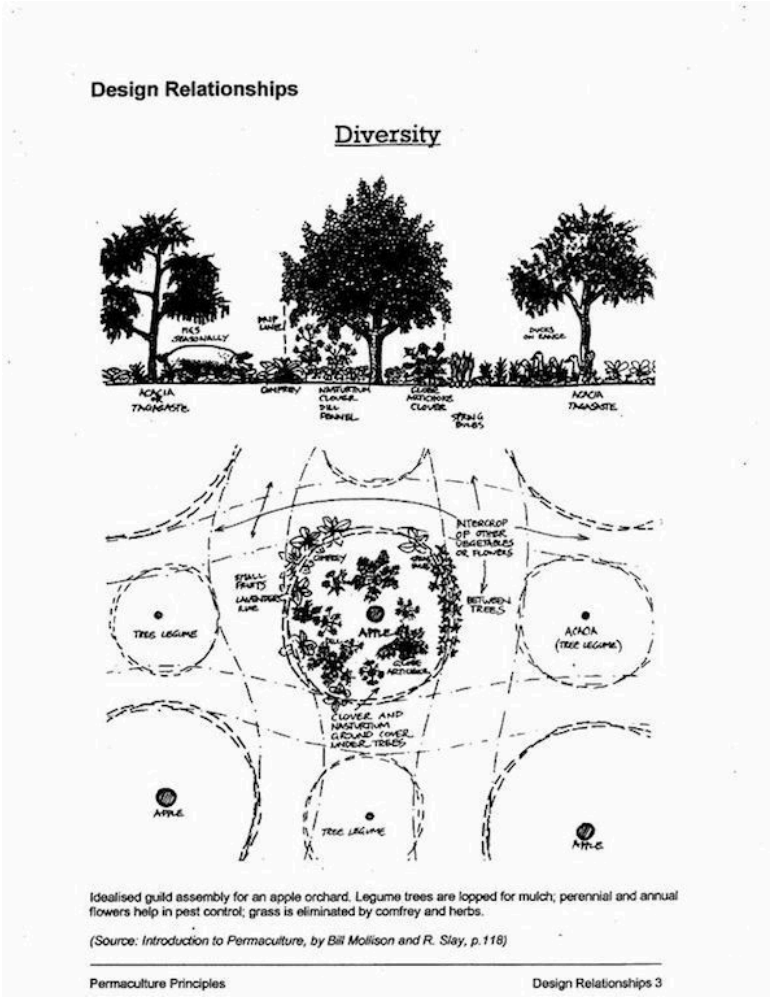
After a severe natural or man-made disturbance, the cover of vegetation may be lost, leaving the ground surface bare. If the original vegetation was forest, in time the ground will be colonised by grasses, which will be succeeded by herbs, shrubs, small-growing trees, and taller trees. Eventually a mature forest, known as the climax community will be re-established on the site.

This process of colonisation is called succession.

(Source: Earth User's Guide to Permaculture, by Rosemary Morrow, p. 17)

Permaculture Principles Design Relationships 2

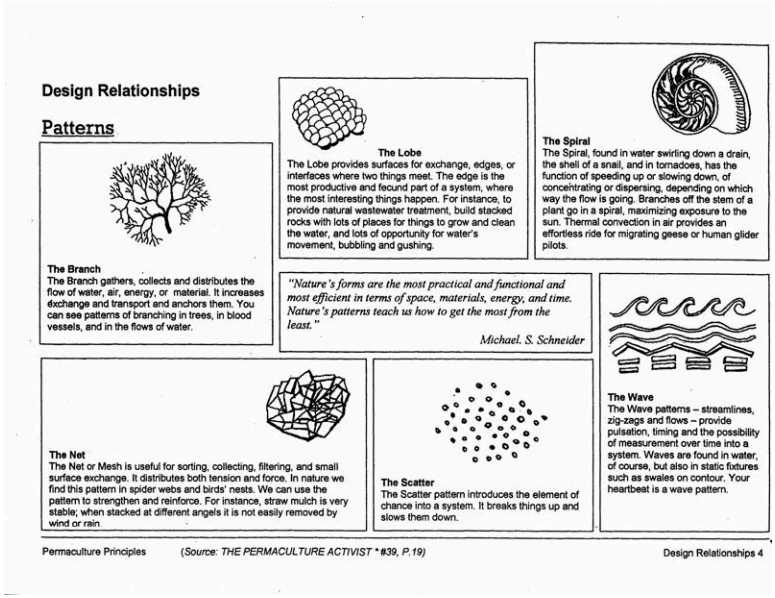
Permaculture Design Principle: Diversity



Idealised guild assembly for an apple orchard. Legume trees are lopped for mulch; perennial and annual flowers help in pest control; grass is eliminated by comfrey and herbs.

(Source: Introduction to Permaculture, by Bill Mollison and R. Slay, p.118)

Permaculture Design Principle: Patterns



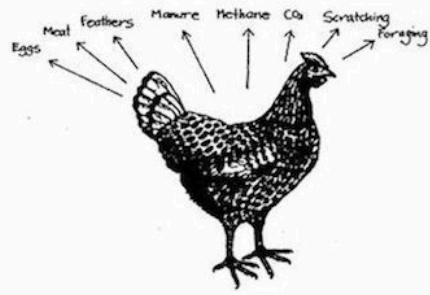
Permaculture Design Principle: Multiple Functions, Multiple Elements

Resource Planning

Multiple Functions

Each element in the system (plant, animal or structure) should be chosen and placed so that it serves as many functions as possible

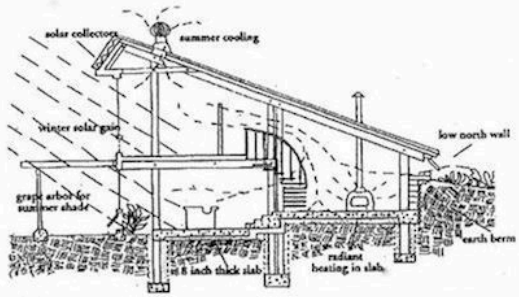
(Source: Introduction to Permaculture, by Bill Mollison and R. Slay, p.6)



Multiple Elements

Important basic needs (functions) such as water, food and energy should be served in two or more ways.

This House is heated using solar gain, thermal mass and a stove.

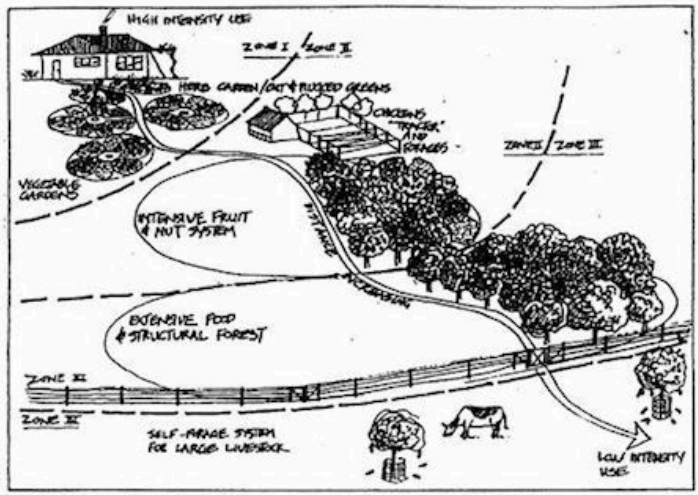


(Source: Rebuilding Community in America by Ken Norwood and Kathleen Smith, p. 130)

Permaculture Design Principle: Zones & Elevation

Energy Efficient Planning

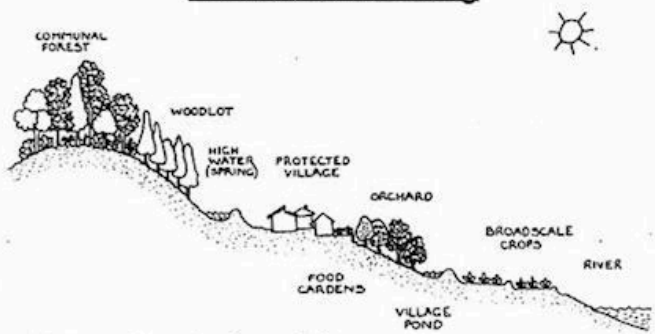
Zone Planning



The relationship between distance and intensity of use. Frequently-visited areas are placed closest to the house.

(Source: Introduction to Permaculture, by Bill Mollison and R. Slay, p.9)

Elevational Planning



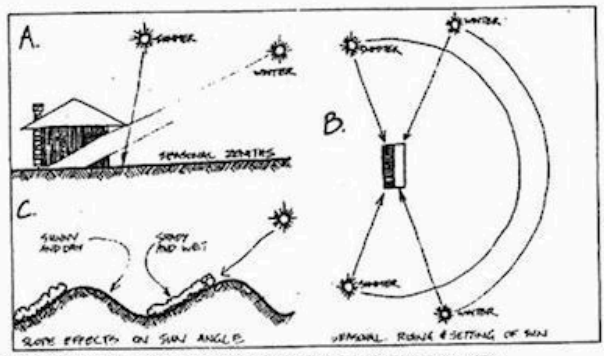
(Source: Earth Users Guide to Permaculture, Rosemary Morrow, p.121)

Permaculture Design Principle: Sectors

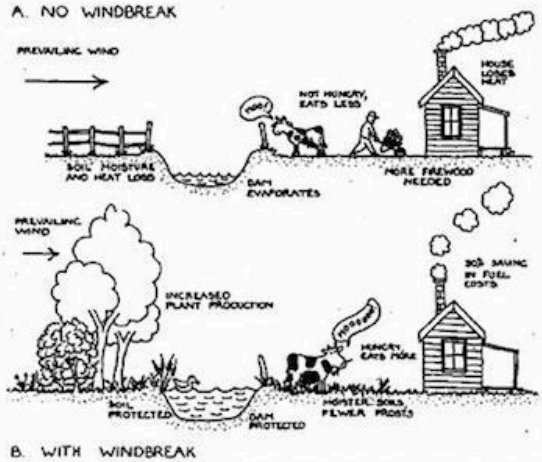
Energy Efficient Planning

Sector Planning

(Source: Introduction to Permaculture, by Bill Mollison and R. Slay, p.37)



Sun direction and its seasonal height affect house design and plant communities.



Advantages of windbreaks. Climate modification, improved plant and animal production, and conservation are some of the benefits provided by windbreaks.

(Source: Earth Users Guide to Permaculture, Rosemary Morrow, p.54)

Permaculture Design Principle: Relative Permanence

The chart below which describes the relative permanence of elements of concern when we are working on land use designs.

The Scale of Permanence: A Tool for Site Analysis & Assessment

[Most Permanent/Least Changeable]

1. Climate
2. Landform
3. Water
4. Legal Issues
5. Access & Circulation
6. Vegetation & Wildlife
7. Buildings & Infrastructure
8. Microclimate
9. Zones of Use
10. Soil
11. Aesthetics

[Least Permanent/Most Changeable]

This chart from the original by P.A. Yeomans, *Water for Every Farm,* the book that introduced Keyline Design[242] to the world in 1965, and since modified by many a permaculture designer.

The designer uses this list as a potent reminder of how easy or difficult it is to change certain aspects of the site. Another use of the list is to cause the designer to focus most of their energy on prioritizing good designs that work within the constraints of the high permanence items first.

For example, designing around item three, water (which has high relative permanence), should take place very early in the design process as it is very likely that the elements (swales, dams, diversion ditches, bridges, etc…) included in a water design will lay down strong patterns and shapes on the landscape that will strongly influence the placement of elements with less relative permanence (such as buildings).

Conversely, if we locate an element of relatively low permanence, for example, a house or barn, without paying attention to a water

[242] https://en.wikipedia.org/wiki/Keyline_design

design first, we might site the house in the only location on the property that is suitable for an earth dam. Indeed this is a common conflict because very often good house sites and good dam sites look the same. The scale of permanence tells us we should hold off making a choice between water and house until such times as our water design is, more or less fully developed, and then the choice (dam or house) might very well have been made for us.

Our next job is to develop a scale of permanence for social/community design situations. Your thoughts about this topic are sought!

GADIE step: Implement

I = Implement

Whether you are working on a design to guide your own action (implementation) or a design for a client, it is essential and helpful to think through what the implementation sequence will look like.

There is a great deal of opportunity to think creatively in this phase so the design can unfold in a succession that suits budgets, available labor, and energies, and which meets critical needs first, such as generating an early income stream.

From thinking to doing – a big step

There is a significant change of character in the project at this phase. Now we move from the more conceptual work of design into the getting it done phase. This is often deeply challenging work and a real test of our capacity to engage thoughtfully and consciously with concrete experience. People who are good at both the planning of an installation phase and also unfolding a design on the ground are sought after, especially if their skill-flexes include leading a team.

Improv again

There is much need for flexibility and improvisational skills here. No context is ever accurately recorded in its entirety by the earlier analysis and assessment phase (hence the expression, "the map is not the territory") and there are bound to be surprises and contingencies.

Often, these surprises might be substantial. In the example we saw earlier – Springfield Community Gardens, Bradford, England[243] – the successors to the National Coal Board picked up the design in its formal passage through the urban zoning system and let us know that they had reasonable grounds to assume that there were remnant, unmapped, bell-mouth coal-mine workings on the site dating back to the 1700s.

We were forbidden to proceed until we excavated the lower part of the site to a depth of 15 meters so as to find and seal any openings with 2 meters of reinforced concrete. This set us back an unexpected 10% of the budget and delayed our building work until the beginning of the wet season giving us another raft (sic) of unplanned-for contingencies.

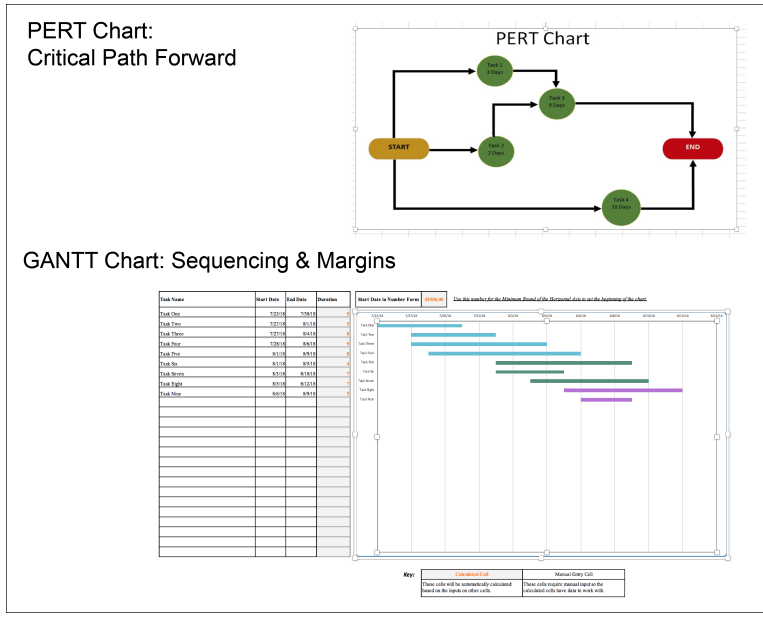
All this was required despite our detailed search of mining archives beforehand which turned up nothing. The excavation did find an "opening", but it was already collapsed and filled in by spoil caved-in from above. However, in the interests of public safety, the 10 tons of concrete went in the hole anyway.

Methods

Typical methods here include classic project management tools such as Gantt Charts and Program Evaluation and Review Techniques (PERT). These latter methods (PERT) use statistics and arithmetic to do their best to predict which elements of the installation have "float" or margin. (That is, they can be delayed without

[243] http://gaiauniversity.org/topic/design-1/

affecting the overall timeline of the installation) and those that are on the critical path and have no float so, if they are delayed (bad weather, sick team members, materials delayed in delivery, the client changes their mind about the design, equipment breakdowns and so on), then the whole project will be delayed and won't complete on time.



You may not need to use anything so technical as a PERT analysis. A Gantt Chart, however, is a straightforward time-lining tool and well worth deploying enough times to get familiar with how they work. Still, the concepts included in a PERT analysis are of great value. Primarily:

- what are the probabilities of the time and resource estimations being accurate, and
- which elements of the installation have 'float' and which do not.

Once you have these ideas in mind, you can choose where to focus extra attention (on elements on the critical path and that are

particularly sensitive to disruption).

Another invaluable method is analytical estimating. Also simple in concept, it requires that you break a project down into elements of as small a time span as you have the patience for. Then you estimate the time needed to complete each element, add them up and bingo! You have a time estimate for a complex installation on a type of job you have never done before.

The theory is that even though you will have likely wildly overestimated and underestimated, these "mistakes" will, if the elements are divided down enough, turn out to cancel each other out. An estimate made like this is the perfect homework to take to someone you know who already has experience in contracting of some sort. They can readily show you what data is used in their trade and so you can use this to improve your own estimates. Of course, an estimate of time and resources required is the basis for you to work out how much you should charge should you get the job.

Practice please!

We recommend that you expect to plan and actually implement several of your own design projects to acquire the critical feedback that tunes your ability to organize the doing, improvise your way through contingency responses, and find out how close your estimates were to the real thing.

There is nothing quite so refreshing as a project doer/implementer who knows their stuff, and you should aim to become one of these.

GADIE step: Evaluate

E = evaluation

In the evaluation stage, we come to a place of reflection.

The first two questions (of our famous four), *"what went well" and "what was difficult and/or challenging"* are very useful here. We can modify their form a little (re-design) to have them be exactly relevant.

Goals

We can look at the goals we derived from the goals articulation process that came at the beginning of our design process and ask:

1. Which goals did we meet well and, which did we surpass?

and

2. Which goals were difficult and challenging to meet and were there any we missed altogether?

In a situation with a client group and a designer, we would probably look for several voices to respond to these questions and more.

The design process

Then we can turn our evaluation attention to the design process itself and ask "what went well" and "what was difficult" for each stage. Now, to aid our learning, we can add in "what would I do differently next time," revisit our long-term goals and visions (in relation to ourselves as ecosocial designers); and devise some next achievable steps.

A particularly potent zone of evaluation it to check out how accurate our time and cost estimates were. Where were the over-runs (and why) and the under-runs? Use the information to tune your estimating skills for next time around.

Designing evaluation into the project from the outset

If we have the opportunity, we would, of course, love to embed an evaluation system – consisting of a bunch of feedback loops

and indicators – into the design at the design stage. If these loops can operate for a number of years, so much the better, as many of the outcomes and yields of our design work are unexpected. The unexpected yields are often more significant than the ones we planned for.

Unexpected outcomes (an Andrew story)

Here I have in mind such "disasters" as my first LETSystem currency installation/experiment in Totnes, England in the early 1980s. It was one of two "first" LETSystems in the UK. The other was in Norwich.

It ran (or at least sputtered-on) for a couple or three years. We could not get the accounting software to work, and then we had to ditch the whole thing and write off some credits in user accounts. We carried it off semi-elegantly! These days we would know to frame such a venture as an experiment in advance so that users would know that they risked losing their credits if the system folded.

An early evaluation would have shown it to be a "failure" in terms of its ability to add significant additional money supply into the local economy. However, its existence also enables the following outcomes:

- it attracted an open source software writing team who took on the job of making the original rudimentary software work as a stand-alone instead of needing an expensive database. (The new system was called NLets, was the very first of its kind, and was a liberating structure no less!)

- it garnered attention and support from the world-renowned New Economics Foundation[244] giving Complementary Currencies more than just street credibility (NEF has just been granted £84,000 to develop a working system that will allow the London Borough of Lambeth to use Brixton Pounds[245] as part of the payment plan for

[244] http://neweconomics.org
[245] http://brixtonpound.org

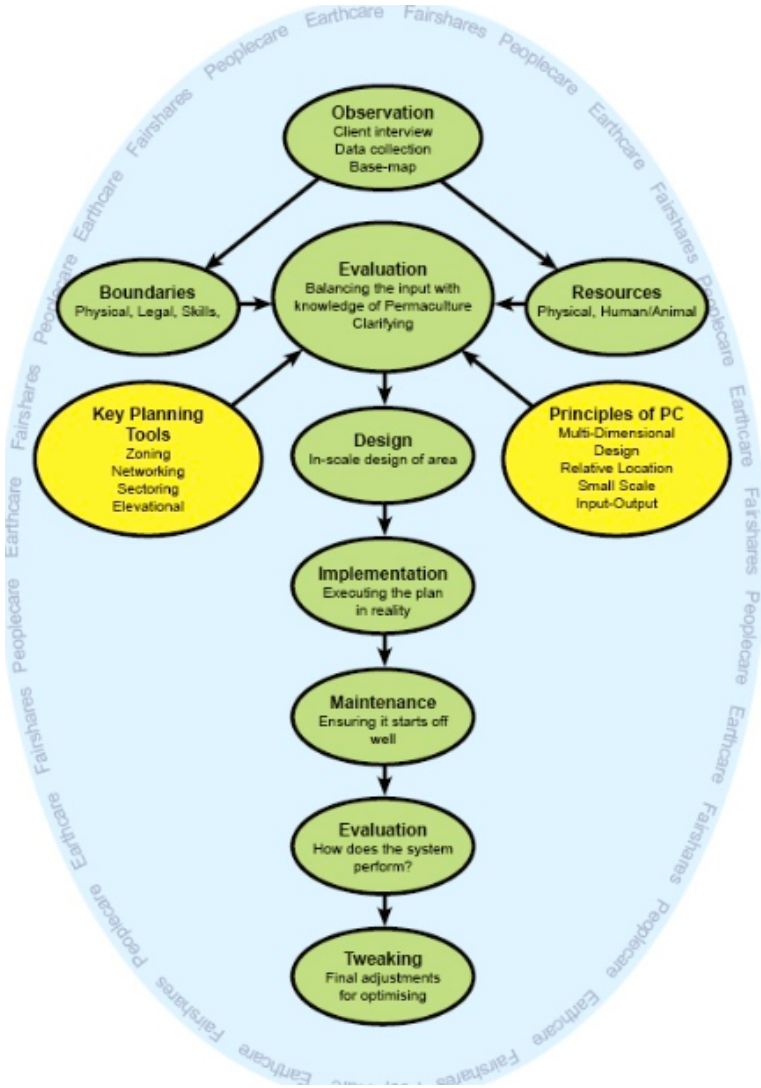
employees.

- it gave direct rise to LetsLink UK, an association of LETSystems and their allies who took the concept viral and, with the new NLets software, had 400+ systems operating by 1990.

So that's a small attempt around the long-term mapping of outcomes arising, directly and indirectly, from our little "failure" in Totnes. It was a very worthwhile venture in retrospect, and that's even without counting the individual un/learnings, the collective capacity building, and the installation of the complementary currency meme in the UK psyche.

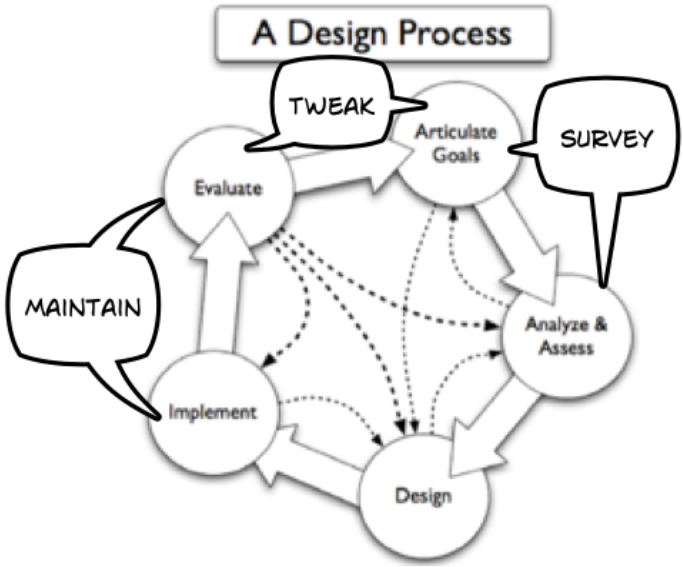
O'Bredimet

O'Bredimet, you will recall, is a close cousin of the GADIE design framework we have been looking at. This graphic outlines the phases.


Earthcare Fairshares Peoplecare
Observation
Client interview
Data collection
Base-map
Boundaries
Physical, Legal, Skills,
Evaluation
Balancing the input with knowledge of Permaculture
Clarifying
Resources
Physical, Human/Animal
Key Planning Tools
Zoning
Networking
Sectoring
Elevational
Design
In-scale design of area
Principles of PC
Multi-Dimensional
Design
Relative Location
Small Scale
Input-Output
Implementation
Executing the plan in reality
Maintenance
Ensuring it starts off well
Evaluation
How does the system perform?
Tweaking
Final adjustments for optimising

GaSADIMET

GaSADIMET combines aspects of GADIE and O'Bredimet. You can make your own synthesis if you like. Extras to GADIE show up in dark type.



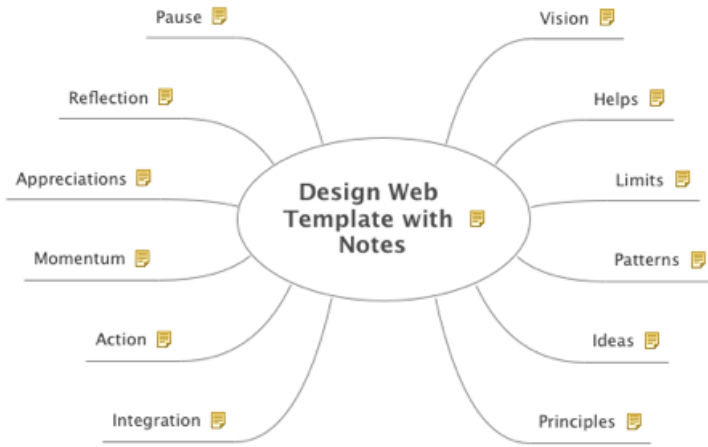
Design Web for Social Permaculture and Soft Systems

The previous models have focused on land use design. With attention to creative iteration, they can approximate to agile design approaches such as the Successive Approximation Method. Land use might be considered a "hard systems" field.

However social contexts (where people and communities are involved) may need different frameworks.

Here is one such "design web," created by Looby Macnamara, the author of *People and Permaculture*[246] (2012). The design web has been patterned into XMind for us by Ariane Burgess, a Gaia U Advisor.

Click here[247] to see the version loaded on the XMind server. Download it to expand the nodes and get the full value.



Other Delights

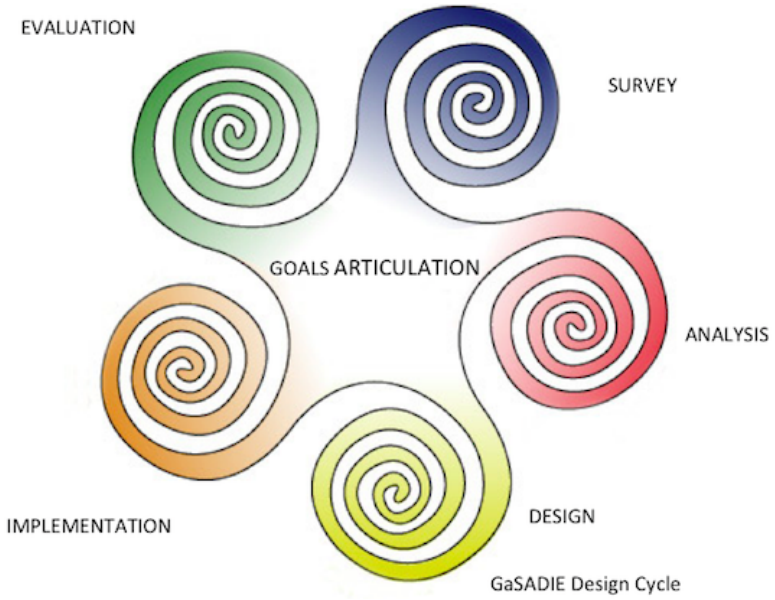
Here is a much more beautiful representation of a design framework (source – Jennifer English, Gaia U). This time you see GaSADIE

[246] https://www.amazon.com/People-Permaculture-Caring-Designing-Ourselves/dp/1856230872

[247] http://www.xmind.net/m/bJMU/

(which you will recognize as yet another cousin to the frameworks that we have seen so far).

On the next pages, please see two approaches that expand the idea of design frameworks. We can again make the point that there is no right way proposed here. Rather, each of us should be able to articulate what approach we are taking and why.



Pattern Languages

Now we'd like to introduce, oh so briefly, some other design frameworks and approaches.

Pattern Languages arose from the brilliant work of Christopher Alexander and colleagues, mostly architects and designers of the built environment, who noticed that certain designed environments were much more likely to resonate, in a nurturing way, with people

using them whilst others, perhaps just as much designed, alienated people.

They were intent on articulating the patterns by which built environments invoked a sense of nurture (and, conversely, alienation). By making these patterns clear and visible, designers, users, clients, and contractors would be able to communicate accurately and with even levels of skill with each other. Hence the idea of a language, in this case, *A Pattern Language.* And, as the language is easily understood, locally adaptable, and deeply inspiring to use, it can democratize the design process and liberate creative intelligences amongst the full spectrum of users.

The importance of democratizing design processes cannot be overestimated. Design work has conventionally been the preserve of highly trained professionals (of a class that can afford long trainings) who therefore know an arcane, impenetrable (by design?) language (strange words, technical drawings…).

This obfuscation of design processes effectively excludes people with different experiences of literacy who may be unable to critique (and/or articulate their critique of) the thinking of professionals. A significant reason for the creation of *A Pattern Language* was to contradict the otherwise unchallenged hegemony of the professional classes.

The team for *A Pattern Language,* Christopher Alexander, Sari Ishikawa, Murray Silverstein with Max Jacobson, Ingrid Fiksdal-King and Shlomo Angel, developed a highly sensitive capacity for feeling out the extent to which a street, a building, an alcove, a window embodied the *'quality with no name'* and went to great lengths to explain why each element could claim this accolade. They included a study of how each element both related to its context and provided sympathetic context for other, connected elements. If you were to buy and use only one book about design (well, two actually – and assuming you already had *Permaculture – A Designers Manual*) *A Pattern Language* and it's partner, *A*

Timeless Way of Building, would be top of the list.

And thanks to the internet you can look at the original Pattern Language here[248].

And, joy of joy, see this sociocultural pattern language[249] (inspired by the original).

And to bring us right up to date (well, Winter 2013) check out this interview[250] in which Rob Hopkins of Transition Town fame interviews Christopher Alexander of Pattern Language fame at home in England.

Appreciative Inquiry

Appreciative Inquiry[251] is a segue from *A Pattern Language* in a way. It seeks to change the energy around design entirely by eschewing problem-solving (which is seen as a deadly process of grinding through a mountain of tedious analytical work) and focusing instead on successes. "Where there is one success" goes the thinking "we will uncover others." "Build on what's going well, avoid Eeyoreing[252] at all costs" is the motto. That is, it seeks to invoke "The quality with no name" whilst actively avoiding possible alienation and overwhelm.

Successes are what we connect with when answering the question, "What's going well?"

Meanwhile, these two lucid visuals from Dave Potter compare problem-solving with the appreciative approach.

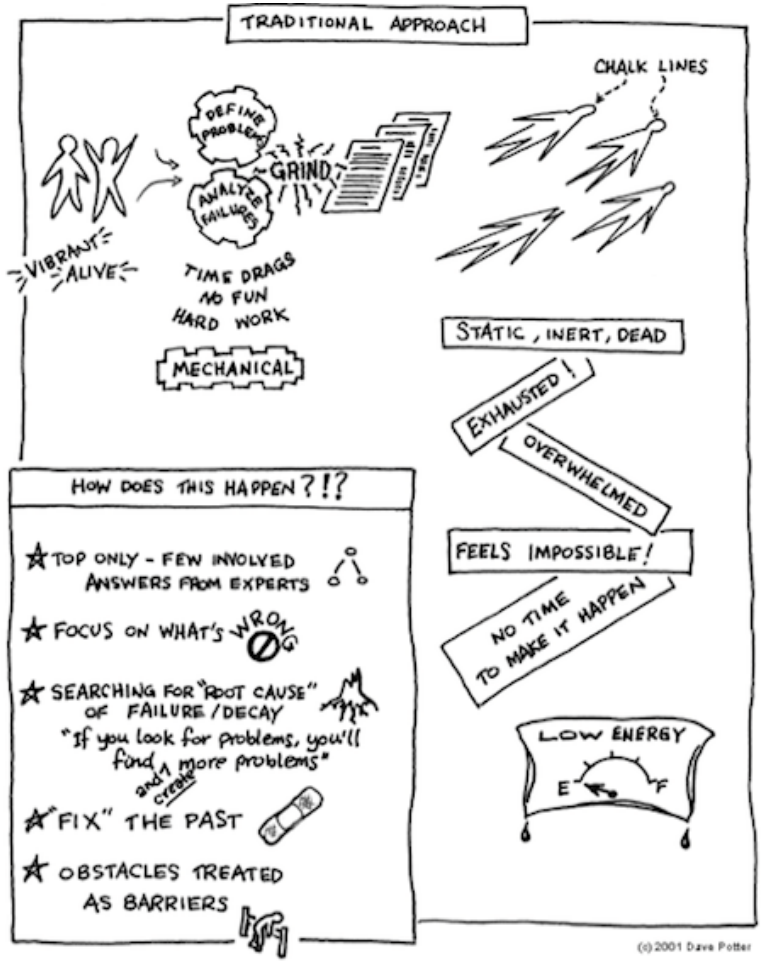
[248] http://www.patternlanguage.com/leveltwo/patternsframegreen.htm?/leveltwo/../apl/twopanelnlb.htm

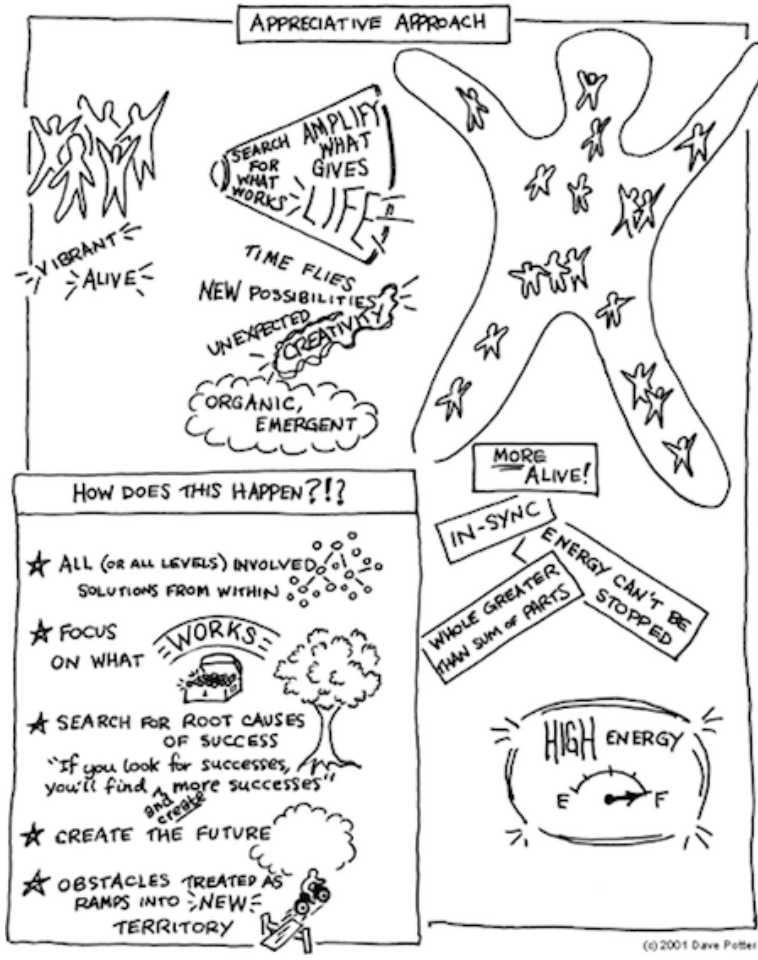
[249] http://www.publicsphereproject.org/patterns/

[250] https://www.transitionculture.org/2010/12/23/exclusive-to-transition-culture-an-interview-with-christopher-alexander/

[251] https://appreciativeinquiry.champlain.edu/learn/appreciative-inquiry-introduction/

[252] "Eeyoreing, what's that?" you might well ask. Eeyore is a legendary character in English children's' culture famed for his negative (self-deprecating) take on almost everything. See some of his quotes here and then you'll get the point for sure.


TRADITIONAL APPROACH
CHALK LINES
DEFINE PROBLEM
ANALYZE FAILURES
GRIND
VIBRANT ALIVE
TIME DRAGS
NO FUN
HARD WORK
MECHANICAL
STATIC, INERT, DEAD
EXHAUSTED!
OVERWHELMED
FEELS IMPOSSIBLE!
NO TIME TO MAKE IT HAPPEN
LOW ENERGY
E
F
HOW DOES THIS HAPPEN?!?
TOP ONLY - FEW INVOLVED
ANSWERS FROM EXPERTS
FOCUS ON WHAT'S WRONG
SEARCHING FOR "ROOT CAUSE" OF FAILURE/DECAY
"If you look for problems, you'll find more problems"
and create
"FIX" THE PAST
OBSTACLES TREATED AS BARRIERS
(c) 2001 Dave Potter



Lean Project, Gaia U Style

Inspired by the Lean Stack collection[253], Gaia U is advocating for the use of these Lean processes in our project design. We saw this earlier in the elements focused on regenerative livelihood design,

[253] https://leanstack.com/welcome

and this page is a reminder of that approach.

Lean design is derived from several sources including the agile software and apps development world. It intends us to design the whole at a pattern level in rapid prototype style and then get our initial designs out to clients and users for feedback early on. It uses a canvas (template) to guide the process.

Many advantages are claimed:

- Whilst the design thinking might be profound the act of creating the project (or more classically, the business/project planning) is significantly lightened up. This is a great relief to those of us who remember the horrible and lengthy (10 days) task of preparing formal business/project plans, most of which were rarely referenced with any intent to evaluate the project.

- The projects so designed and iterated are much less likely to be bloated by unnecessary features. It is claimed, for example, that 80% of software features demanded by clients are almost never used. Meanwhile, the features that are incorporated are ideal for the end-user (because these features were built to meet a real-life usability scenario, not an imagined one).

- As the designer concentrates on a rapid sweep using a whole "canvas" they are less likely to fall down a rabbit-hole (attend to too much detail and get lost) and more likely to consider all the aspects flagged in the canvas.

- The time commitment to complete a run at the canvas is not very much – one to two hours is typical – so, if you don't like the result, you can start over without feeling as if you are losing the last two weeks' work.

- The canvas asks you to design feedback loops into the project design from the beginning, so you know how to evaluate whether the project is working before you begin.

Here is the Gaia U Lean Project template[254]. If you have an account

[254] http://portfolios.gaiauniversity.org/view/view.php?t=2IyJKESx5QTRioebaMOq

at portfolios.gaiauniversity.org you can copy this template into your portfolio and use it there. If not then feel free to screenshot the text and make up your own version in another piece of software (a spreadsheet in Open Office would do it).

See more about Lean approaches here[255] at the Lean Startup website.

A short coda (ending)...

We hope you can see that the design field is full of wonders and full of interest.

We have really only scratched the surface here in this chapter (although the collection here is much broader and more diverse than most design professionals would see). There is much more to learn and know about, mostly arising from *doing* design (see here for an engaging read[256]. However, as we said at the outset of this section, given that nine-tenths of the designer's skill resides in being able to work confidently through a chosen framework like GADIE (thus allowing the design to emerge, almost without effort) you will make significant gains from applying the fresh knowledge you have acquired through this chapter.

Activities

Your Mind Map

Create an XMindMap that summarizes your interpretation of the content in this Element including any critique and any additional information you would like to include.

[255] http://theleanstartup.com
[256] https://emergentbydesign.com/2010/01/14/what-is-design-thinking-really/

Your SWOT Analysis

Use the SWOT analysis XMind template (find this in the XMind program on your desktop by going to File/New and selecting the template from those offered) to explore your strengths and weaknesses, opportunities and threats as regards project doing and design skills.

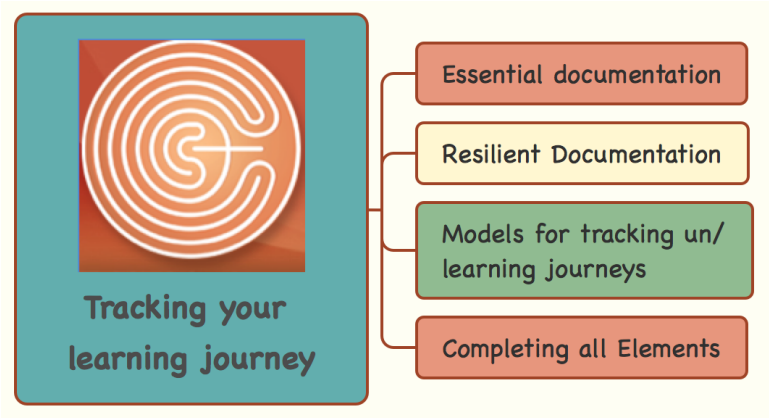
Lean Project Design

Use the Lean Canvas (or the Gaia U version) to outline a project you expect to work on in the coming year.

Leverage points analysis

Consider a project you are thinking to do. Can you describe the system that this project is part of and, using the Dona Meadows leverage points, can you articulate which leverage points this project will affect? Has the process of thinking about the project from the leverage points perspective altered the way you would design the project?

Chapter 8: Tracking Your Un/Learning Journey



Essential Documentation

Two groups, one proposal

This Element, Tracking your Learning Journey, is intended for two groups of readers.

The **first group** is composed of people who are not enrolled in a Gaia U program right now. For you the issue is that you will not have the (liberating) structure of the production of Output Packets in your lives and nor will you necessarily have the regular support[257] of a Main Advisor to hand. This is a perfectly reasonable

[257]Gaia U does provide pay as you go Advising. See mentoring in our catalog here. This is a valuable option that comes between "going it alone" and being on the full program. It can substantially increase your productivity and sense of progress.

way to go. Indeed most of us proceed in this way for most of our life's journey and only now and again do we give ourselves the luxury of generating organized gobs of documentation and have our work peer and professionally reviewed.

The **second group** has opted for a Gaia U program, perhaps as a means of supporting an exploration that emerges a new "career" or as a means of telling the stories of a soon to be ended life phase by reviewing its effectiveness and moving onto something new.

Either way we encourage you to develop a documentation practice. We hope it is a practice that has you at least take the time to reflect on what's going well and what's challenging[258] at frequent intervals and that has you record these sessions in some way.

The bones

- Have another person listen to you, think and listen style (you return the favor) whilst taking notes for you on Skype/WhatsApp or in the flesh for 20 minutes each, once a week would likely serve the purpose as a minimum.

- Add to that the gathering of images that record your progress (original photos, photos of tickets to events, programs, handouts, and so on) stored on your phone or collected in Google Photos /Photobucket/Flickr[259], and we already have the bones of a system sufficient to return to when it does become time to work up more comprehensive pieces of descriptive and reflective documentation.

- Extra traction can come from keeping a five-year diary. For all of us interested to know when fruit is likely to be ripe enough for picking, soils to be warm enough before planting seeds and noticing other seasonal, time-related phenomena, a five-year diary offers

[258] What's going well? And what's challenging? Are the first two questions of the much loved (but often adapted) Gaia U Questions Quartet. Questions 3 and 4 are: What are my long-term goals and visions? And what are my next achievable steps? Going for all four makes for even better value than doing just the first two.

[259] https://en.wikipedia.org/wiki/List_of_image-sharing_websites

a powerful means of keeping track as to when to make essential preparations ahead of time. It works too for expressions of the heart (how am I feeling?) See this simple version here.[260]

- And using a social bookmarking system (Andrew at Gaia U uses Diigo,[261] others use Evernote[262], and there are many more) that allow you to save links to websites you find that are relevant to your journey, sorted by tags (you can also see the links other people have shared with the same tags). All in all, you might spend an hour or two a week (in bits) doing this raw documentation without concerning yourself as to how you will gather this together for any form of presentation. It will make a huge difference in your ability to recall events and critical incidents in the future.

Contradicting non-documentation syndrome

Those of us engaged in practical projects are often too busy "doing" to document our work in any depth, especially if documentation is not included as a goal or requirement of our projects.

Several disadvantages can arise from this omission.

- If lack of documentation means we are too busy to even reflect on our work, then it suggests that we are not consciously or methodically passing through that vital "reflective observation" mode of learning from experiences. Thus a great many of the opportunities for profound learning and unlearning may, therefore, be missed, and we may merely continue to "do" projects that are not actually effective regards to our goals.

- Nor will your skills in using yourself as the subject (a key action learning orientation) show up well. An insightful, self-conscious self (meaning aware, not embarrassed) tells meaningful stories

[260] https://fiveyeardiary.herokuapp.com
[261] https://www.diigo.com
[262] https://evernote.com

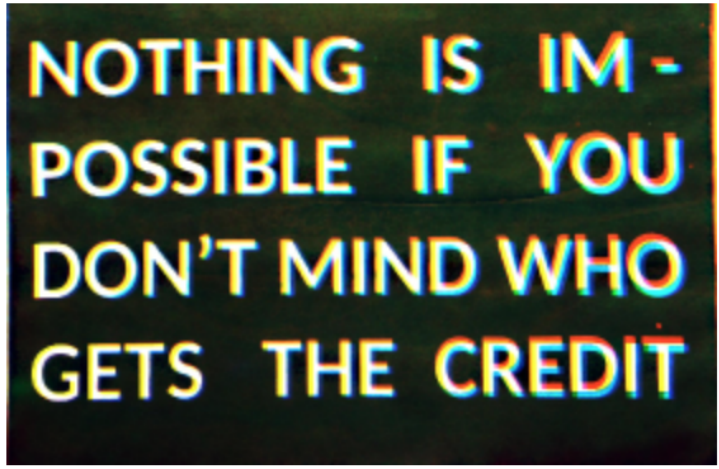
of how they un/learned what from whom (or what experiences), when and where and this narrative, well documented, is one of the most powerful ways to develop and show your capacity for critical reflection.

- Likewise, we may wind up with very limited evidence of our journey/pathway especially concerning how conscious we were about making our choices of what directions to take, what systems to intervene in, and what resulted from our intervening efforts.

All these aspects have both intrinsic and extrinsic value. Intrinsic here means that you are aware of the value of your journey for yourself and whilst you may want to increase the potency of the un/learning for yourself you are not seeking other people's attention.

Extrinsic means that you want to be able to show other people just how much competence and attention you have because, for example, you want feedback, mentoring, might be applying for funds, jobs, credits for qualification, and more.

We are often differentiated from other people in that we value intrinsic above extrinsic value and that is mostly a good aspect of who we are. We want to do what we do, not for the awards, the money, the power, the status, but more for the richness we experience from following our own inspirations and from working for ecological regeneration and social justice. Indeed we might live by the motto in the poster below:



However, it does help with gathering resource (accessing funds perhaps) if we can show others how effective we are (even with slim resources). We also do enjoy being affirmed and validated by others for the power of our works.

On the larger, epistemic community level, collected stories of our un/learnings are critical to the take up of our thinking in the world. That is, our capacity for leading more significant change efforts is enhanced when we can show that our collective efforts are working. This requires that we publish good content as much as we can. By documenting, we increase everybody's effectiveness.

Resilient Documentation

Why Resilient Documentation?

It is easy in this digital age to imagine that whatever you author (write/compile) now will be easily saved and retrieved at any time in the future.

Not so!

The systems drift problem

The operating systems you use (Windows, Mac OS, Linux, Solari…), the authoring software (MS Word, Pages…) and the media (remember 5-1/4 inch floppy disks anybody?) are bound to change over time. Not every change will be backward compatible (that is, the technology of today may not work with the technology of yesterday), nor will you necessarily have the functioning hardware and cables necessary to run obsolete storage devices (like floppy disks) on your new machine.

This problem arises even between versions of the same, proprietary brand of software (MS Office, for example, changed its formats so much between doc and docx that many of us have a hard time converting). Add in media changes and OS (operating systems) modifications, and you can see that maintaining long-term access to your work will become an issue.

Modern librarians are afflicted by these issues and have to spend a great deal of time and money updating "old" digital documents to new formats.

Generating and publishing editions

A second issue is that, over time, you will likely want to reform, re-use, re-purpose, edit, and mash-up your material at will. Your ways of thinking will change, your insights will develop, and you may want to broadcast or narrowcast these changes by producing new editions of your material and publishing them via blogs, Facebook pages, Wikipedia articles, forums, papers you can email in the form of formatted .pdfs, websites, and more.

If your materials are only available as, for example, fully formatted and illustrated Word* (97) documents, it is hard to extract bits and re-purpose them. It is much better to have the content stored in raw, unassembled (text and images separate), update-able formats

so that you can draw on them at will and easily push them to any publishing platform (digital or print).

Resilient Documentation Solutions

Use open and forward compatible formats such as:

- **text only** as .txt
- **text and graphics** as .rtf, .odt (.odt is an Open Document Standard, very good for resilience)
- **images** (in original sizes and resized for purpose) as .png files

A special note about MS Word here. MSWord has been around a long time. It uses a non-standard form of markup language (which you hardly ever see) to format content. You may get to see it (as goobledegook) when you cut and paste Word-generated content into websites, forums, and so on. It is sometimes hard to get rid of, and it can also break your site. Better not to use Word at all if you can break the habit.

For your desktop try Open Office (free and open source)[263] and/or Libre Office[264] (also FOSS = free and open source software).

In Gaia U we are making increasing use of Google Drive for generating original documents. Google is not open source, but it is free and the advantages of having your content stored (backed-up) in the cloud (you also have the option to save it on your desktop with the offline application) and being able to share folders and documents by sending links, is proving to be worthwhile. Especially useful is the commenting function that allows you to give other people the opportunity to comment on your work.

[263] http://www.openoffice.org
[264] http://www.libreoffice.org

Back-ups

Please **keep backups** of your work on a drive that is separate from your primary machine – either an external hard drive or an online backup service or both! Free online back-up of modest amounts of material can be managed through Dropbox, Google Drive, and other services). Investigate cloud services if necessary.

Please back up your work! Or, if you want, *you can ignore this request and wait until you lose the last six months of your work before you get the message. This happens often enough to cause considerable grief and hassle, which you can do without!*

Time outs

Many websites (including the Gaia U site) knock you out of the site if you are inactive for a period of time. Twenty minutes is typical. That means, if you leave your desk for lunch whilst you have work in progress (an incomplete comment for example) it will be lost by the time you get back. This can be very frustrating!

Strategies to deal with this include writing your posts without stopping for too long or writing them either on your desktop using a word or text processor, so they are independent of the website or using an online service which has an autosave feature (Google Drive, for example).

You can do a belt and braces/suspenders job (double level of safety) by saving the original on a file on your desktop too.

Resilient Documentation: summary

Resilient documentation is:

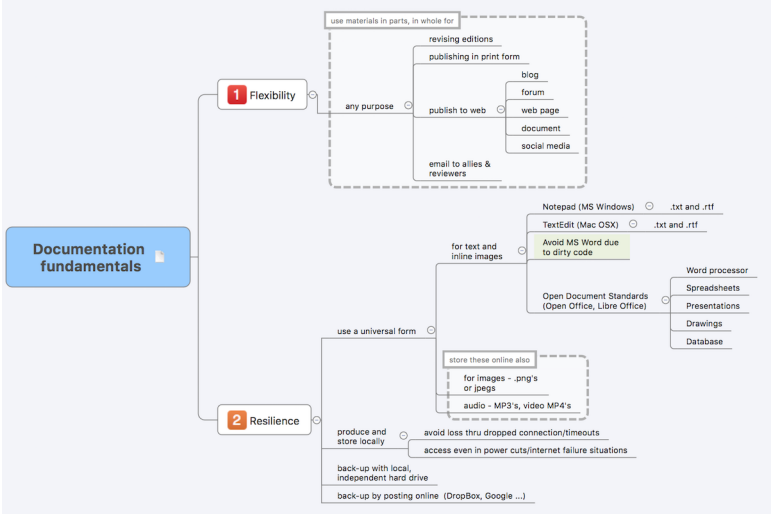
Keeping your originals:

- In simple, forward-compatible formats (ones that are not proprietary, meaning not owned by one company),

- Un-assembled (images and text separate) to allow maximum flexibility and,

- Backed-up on external drives

Please adopt these practices now!



Models for Tracking Un/Learning Journeys

Change Models

Models are a powerful means of explaining ideas and concepts, and we have seen many of these in the Gaia U program so far.

In this case, we are thinking about our unlearning journeys, our action learning pathways, and, using self as subject, noticing how we change. This is a core topic for us as when we know more about our own change process we can authentically mentor other people

the world over who also want to change focus towards ecological regeneration and well being (buen vivir).

There are many change models in the literature of which the 'Unfreeze, Change and Freeze'[265] generated by Kurt Lewin in 1947 could be considered the "original." Lewin, by the way, is a constant source of reference for us in Gaia U so getting to know his work is worthwhile. You can see a Kurt Lewin appreciation and synopsis here.[266]

A most useful summary (and reconfiguration) of many change models, appears in this 2010 book *The Power of Sustainable Thinking: How to Create a Positive Future for the Climate, the Planet, Your Organization and Your Life*[267] Bob Doppelt (Author), Hunter Lovins (Foreword).

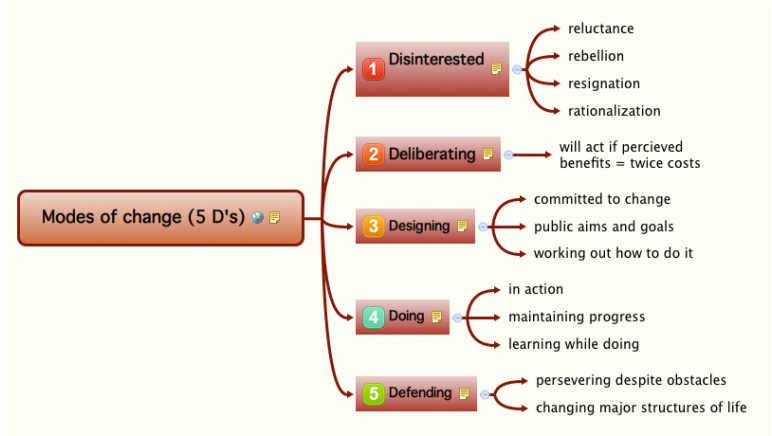
The XM*nd map below draws out the key concepts of the Doppelt model that sees change progress through five stages.

[265] https://www.mindtools.com/pages/article/newPPM_94.htm

[266] http://infed.org/mobi/kurt-lewin-groups-experiential-learning-and-action-research/

[267] http://www.me-to-we.org/the_power_of_sustainable_thinking__how_to_create_a_positive_future_for_the_clima_107233.htm

Doppelt's 5 D's



Derived from *The Power of Sustainable Thinking: How to Create a Positive Future for the Climate, the Planet, Your Organization and Your Life* Bob Doppelt (Author), Hunter Lovins (Foreword), 2010. Click here for original XM*ndmap[268]

The use of the word "sustainable" in the title is a little dated as, these days, we are much more inclined to think in terms of regeneration. "Sustainable" has been significantly co-opted by the mainstream where it is used to greenwash business-as-usual or to cheer for that oxymoron, "sustainable growth." The essence of Bob Doppelt's efforts is, however, much appreciated.

The purpose of the model is to illustrate the attitudes and behaviors of people who are at one of the five stages listed. An extrapolation might be that a society (or community) may also exhibit evidence of being "at a stage." The big question is how to advance a person-/society/community from one stage to the next.

For any of us, in any arena we might notice that we are at a particular place on the Doppelt model:

[268] http://www.xmind.net/m/bqAF/

(1) sometimes disinterested,

(2) sometimes only willing to act if we can see a big enough reward,

(3) sometimes already having decided to make significant changes and working out how to do those,

(4) now fully occupied making the changes and noticing how those are causing us to need to make yet more changes we had not predicted and

(5) needing to defend our decisions and newness against erosive efforts from our communities (who often would prefer that we didn't "rock the boat") or working now to change the cultural infrastructure so that it supports our changes and helps other people to do their own version of the shift.

Using this kind of model to track your own pathway and journey can be illuminating!

A Focus on Transition

Another useful pathway or journey construct is to imagine our lives as a series of transitions with periods of relative stability in-between. We might do the transitions with increasing consciousness as we get more practiced and get bolder, learning from the experience of each one. Thus they may change in character over time.

Andrew writes:

*My own transitions history seems to have moved through the following levels:

Early transitions – unconscious and unknowing – I had no idea transitions were a legitimate part of life, so they were always a confusing surprise. Transitions seemed to arise only because something about my life conditions, often (dramatically) brought on by other people or "accidents" forced me to make changes.

Second level is that I could tell that transitions were an essential element in moving forward, but I had no knowledge that I could be in charge of these and no theory about what the essential nature of transition might be. Indeed there was still a sense that transition was forbidden and that any dissonance I felt should be "sucked-up" or swallowed.

Next came a breakthrough period in which I discovered a simple theory of transition that also encouraged me to design 'the how' of transitions. I also acquired some substantial new processing skills and a conscious support network (I was in my late 30's at this stage). These allowed me to design and activate bolder and more thorough, self-directed transitions.

Currently, I am confident that transition is a positive (nay, essential) process for me and that thus I can look out for, with relish and a sense of adventure, emerging opportunities to make significant changes.

Thus, for me, much of my **storytelling** around my life's un/learning experiences is to do with:

Describing the essential characteristics of the periods of stability that came before the transitions – that is, describing the contexts.

What critical incidents and situations arose that created enough dissonance in my life to cause the transitions (and how oblivious or sensitive I was to noticing and acting on the dissonance – my internal context)?

How the endings of the old took place (of especial importance according to Bridges – see reference below)?

What happened in the periods of semi-chaos between the ending of the old and the emergence of a new beginning?

How did I know that a new beginning had emerged enough for me to fully engage with it?

This simple framework is very juicy for me and uses the Bridges

theory of transition that was my "breakthrough" mentioned earlier.*

Bridge's Transition Model

See *Transitions, Making Sense of Life's Changes (1980 edition) by William Bridges[269]

At its most simple, the theory proposes that a transition consists of three acts in the following sequence:

- Start with an **ending** in which we find ways to complete the old
- Continues with a period of **semi-chaos** during which survival and experimentation are key activities (during this period it is important to resist other people's exhortations to "know what you are doing" or "to settle down") following which…
- A **new beginning** emerges

The power of the model, for me, Andrew, is at least threefold:

In the first place, it is a simple theory that I can remember and thus test by seeing how it works in my own life (this is another use of the idea that "there is nothing quite so practical as a good theory" a quote from Kurt Lewin) and, so far, it works very well.

Secondly, the theory makes it clear that **designing and doing endings**[270]comes before a) chaos, so I don't need to be surprised by the chaos and b) new beginnings emerge and so I can safely start a transition process without knowing where it will lead (it's an adventure!) whilst being prepared (ha,ha!) for all the bumps.

[269]https://books.google.com.ua/books?id=tXdKDgAAQBAJ&lpg=PP1&dq=Transitions%2C%20Making%20Sense%20of%20Life's%20Changes%20(1980%20edition)%C2%A0by%20William%20Bridges&hl=en&pg=PP1#v=onepage&q&f=false

[270]This is still a novel idea. Most of us continue to think about transitions (if we think about them at all) as if finding the new beginning is the first step. This is understandable in that then we'd not be leaping (terrified) into the unknown. Bridge's would say that this is missing a great opportunity to allow (extra) elements of randomness to enter our lives and to practice working through fear. If we make sure we have good support networks on board (places to shake, tremble, perspire and otherwise acknowledge how scared we get) then passing through these challenging chaos episodes builds (sensitive) resilience and, even, a capacity to thrive in chaotic situations.

Thirdly, I have a clear, rich and enjoyable framework to use to figure out which stories to tell and how to think about the context.

Activities: Tracking Your Un/Learning Journey

Deconstruct/Reconstruct the Content

Make XM*ndmaps covering the content of this lesson and share as appropriate.

Your Documentation Intentions

Describe how you intend to organize your essential documentation using resilient methods. For example, you can use screenshots to show the file structures you have set up to receive notes and images, describe your backup strategy, detail what software you'll be using including any web-based networks and otherwise indicate that you have given the matter constructive thought.

Map of Transition Stories

Use XMind to make a timeline.

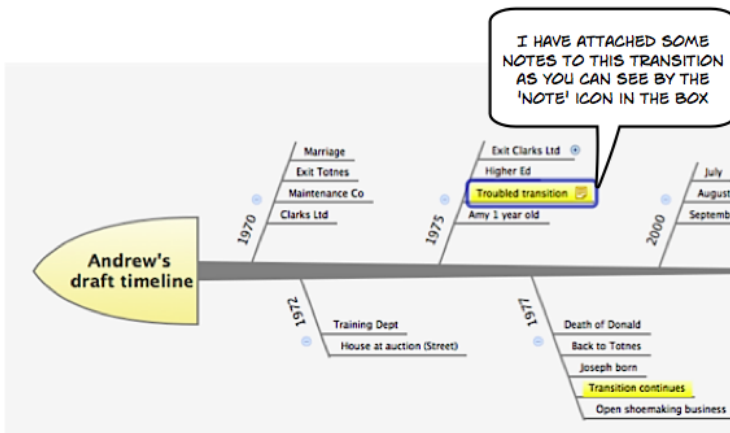
When XMind opens or when you select "New" in the menu, it offers you a choice of templates – find the "timeline template" – it looks like the image below.



Timeline

Open that up and add your content to the boxes, so they say what you want them to say. This will produce an outline of the transition stories you'd like to tell at some stage (a Life and Career Review is a great place to tell these).

Here is an example:



When you have time, you can come back and add in more details to fill it out, and you can also add notes to any of the nodes. You will see there is one such transition node with a note icon.

It is easy to add elements to a timeline like this and, as it is also easy to move elements about. You do not have to get them in the right place to start with, you can adjust later.

Credits

Images

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Tools for managing time mindmap, page 184
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Dog-ear-Ethan, page 213
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Know-how, page 262
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Who-knows, page 267
What-for, page 270
Kolb-learning, page 301 (needs attention!)
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