

## I. What is Holacracy?

Holacracy is a system of organizational governance and management that aims to create a self-organizing and self-managing structure within a company or organization. It was developed by Brian Robertson in 2007 as an alternative to traditional hierarchical structures, and it has gained popularity as a model for organizations that value autonomy, transparency, and agility.

In a holacratic organization, authority and decision-making are distributed among self-organizing teams, rather than being concentrated in a traditional top-down hierarchy. The system is based on a set of principles and practices that promote transparency, accountability, and continuous improvement. Holacracy emphasizes clear roles and responsibilities, defined decision-making processes, and regular feedback loops to enable teams to adapt and evolve rapidly in response to changing circumstances.

One of the key features of holacracy is its use of circles, which are self-organizing teams that have specific purposes and accountabilities. Circles operate within a broader organizational structure and have the autonomy to make decisions and manage their own work. Circles are linked through a governance process that involves regular meetings to clarify roles, responsibilities, and decision-making authority, and to ensure alignment with the organization's purpose and strategy.

Another important aspect of holacracy is its emphasis on evolutionary change. The system encourages regular reviews and adaptations of roles, processes, and practices to promote continuous improvement and responsiveness to feedback. This dynamic approach allows organizations to be more agile and adaptive in a rapidly changing business environment.

Overall, holacracy is a system of organizational governance that aims to create a more agile, transparent, and empowered work environment by distributing authority and decision-making throughout the organization, and promoting continuous improvement and adaptability.

To learn more about holacracy, see the following resources:

- [A video introducing the basics of holacracy \(1h30\)](#)
- [The practitioner's guide](#)

## II. How are governance meetings run?

Governance meetings are a key aspect of Holacracy and are designed to facilitate the process of defining and evolving roles, accountabilities, and decision-making authority within a circle or team. Here's an overview of how governance meetings are typically held in Holacracy:

1. **Circle Governance Meetings:** Governance meetings are typically held by circles, which are self-organizing teams within an organisation that have specific purposes and accountabilities. Circle governance meetings are usually scheduled at regular intervals, such as weekly or monthly, and are facilitated by a circle member who serves as the facilitator or the "circle lead."

2. **Agenda Setting:** Prior to the governance meeting, circle members are encouraged to propose items for the agenda. This can include proposals for new roles, updates to existing roles, changes to accountabilities, clarifications of authority, and other governance-related matters. Proposals are typically submitted in advance and made available to all circle members.
3. **Circle Meeting Process:** During the governance meeting, the facilitator follows a structured process that typically includes the following steps:

a. **Check-in:** The meeting begins with a check-in round, where each circle member has an opportunity to share their current state of mind and any relevant updates or concerns.

b. **Agenda Review:** The facilitator reviews the agenda items and clarifies any questions or concerns about the proposals.

c. **Proposal Discussions:** Each proposal is then discussed and clarified, with the proposer presenting the proposal and other circle members providing feedback, questions, and insights. The focus is on understanding the purpose, accountabilities, and authority associated with the proposal.

d. **Integrative Decision-Making:** Once the proposal has been discussed, the circle uses a specific decision-making process called "integrative decision-making" to determine whether to adopt the proposal or not. This process aims to find objections that can be addressed and resolved to achieve broad agreement. Objections are based on specific concerns related to the proposal's impact on the circle's purpose, accountabilities, or authority.

e. **Resolution:** If no unresolved objections are raised, the proposal is considered adopted, and any necessary updates to roles, accountabilities, or authority are made. If objections are raised, they are addressed through further discussion and clarification, and the proposal may be modified or deferred for further refinement.

f. **Check-out:** The meeting concludes with a check-out round, where circle members can share their reflections on the meeting and any additional updates or concerns.

4. **Record-Keeping:** Meeting minutes or notes are typically taken during the governance meeting to capture the decisions made, roles defined, and other relevant information. These records are used for documentation, reference, and accountability.

It's important to note that the specific details and nuances of governance meetings in Holacracy can vary depending on the organisation's implementation and adaptations. However, the overall goal is to provide a structured and inclusive process for defining and evolving roles and accountabilities within a circle or team, and making decisions in a transparent and participatory manner.

### **III. How are tactical meetings organised in holacracy?**

A tactical meeting is a regular operational meeting that is typically held by a circle in Holacracy to discuss day-to-day operational issues, coordinate work, and resolve tactical tensions. Here's an overview of how a tactical meeting is organized in Holacracy:

1. **Frequency and Attendance:** Tactical meetings are typically scheduled at regular intervals, such as daily or weekly, depending on the needs of the circle. All circle members are expected to attend the tactical meeting, and it is usually facilitated by a circle member who serves as the facilitator or the "tactical lead."
2. **Agenda Setting:** Prior to the tactical meeting, circle members are encouraged to propose items for the agenda. This can include updates on ongoing work, new tasks, blockers, challenges, and other operational matters. Proposals are typically submitted in advance and made available to all circle members.
3. **Tactical Meeting Process:** During the tactical meeting, the facilitator follows a structured process that typically includes the following steps:

a. **Check-in:** The meeting begins with a check-in round, where each circle member has an opportunity to share their current state of mind, any updates on their work, and any relevant concerns or challenges.

b. **Agenda Review:** The facilitator reviews the agenda items and clarifies any questions or concerns about the proposals.

c. **Proposal Discussions:** Each proposal is then discussed, with the proposer presenting the proposal and other circle members providing feedback, questions, and insights. The focus is on understanding the issue at hand and finding solutions or next steps to resolve it.

d. **Action Items and Accountabilities:** Based on the discussions, action items and accountabilities are defined, with clear assignments and deadlines. These are captured in meeting notes or minutes for accountability and follow-up.

e. **Updates on Ongoing Work:** Circle members also provide updates on their ongoing work, including progress, challenges, and dependencies, to ensure coordination and alignment within the circle.

f. **Check-out:** The meeting concludes with a check-out round, where circle members can share their reflections on the meeting, any additional updates or concerns, and express their commitments to the action items and accountabilities.

4. **Record-Keeping:** Meeting notes or minutes are typically taken during the tactical meeting to capture the decisions made, action items defined, and other relevant information. These records are used for documentation, reference, and accountability.

It's important to note that the specific details and nuances of tactical meetings in Holacracy can vary depending on the organisation's implementation and adaptations. However, the overall goal is to provide a structured and efficient process for addressing operational issues, coordinating work, and resolving tensions in a collaborative and transparent manner.

#### **IV. How are brainstorming sessions run in holacracy?**

In Holacracy, meetings focused on brainstorming and conversations can be structured using specific practices and processes. Here's a suggested approach to applying Holacracy principles in such meetings:

1. Start with a clear meeting purpose: Clearly define the purpose of the meeting to ensure everyone understands the desired outcome.
2. Facilitate a check-in round: Begin the meeting with a check-in round where each participant briefly shares their current state or any relevant updates. This helps create a shared context.
3. Use integrative decision-making: If there are decisions to be made during the brainstorming or conversation, use an integrative decision-making process. This involves offering proposals, seeking objections, and iteratively refining proposals until there are no remaining objections.
4. Use rounds for brainstorming: To ensure everyone's ideas are heard, use a round-robin approach for brainstorming. Each participant takes turns sharing their ideas or thoughts without interruption. This helps foster an inclusive and collaborative environment.
5. Practice role-based discussions: If specific roles within the organisation are relevant to the brainstorming or conversation, encourage participants to speak from the perspective of their roles. This allows for more focused and role-specific contributions.
6. Record outcomes and action steps: As ideas and decisions emerge, record them in a shared document or project management tool. Clearly document action steps, responsibilities, and deadlines to ensure accountability.
7. End with a check-out round: Close the meeting with a check-out round where participants briefly share their reflections or takeaways from the session. This promotes reflection and provides closure to the meeting.

Remember, these suggestions are aligned with the principles of Holacracy, but they can be adapted to suit the specific needs and culture of your organisation.

## **V. How are roles determined in holacracy?**

In Holacracy, roles are defined through a process called "role definition" or "role creation." This process involves several steps that typically occur during specific meetings called "circle meetings" or "circle governance meetings." Here's an overview of the role definition process in Holacracy:

1. Identify a Purpose: The first step in defining a role is to clarify its purpose. The person or team responsible for the role identifies the specific outcomes, goals, or objectives that the role is intended to achieve. This purpose statement helps to define the scope and focus of the role.
2. Define Accountabilities: Next, the person or team responsible for the role identifies the specific areas of responsibility or "accountabilities" associated with the role. These are the key areas where the role is expected to deliver results or make decisions. Accountabilities are typically defined in clear, measurable terms to provide clarity about what is expected of the role.
3. Set Authority: The role creator then determines the decision-making authority associated with the role. This includes specifying the types of decisions that the role is authorized to make, and any limits or constraints on that authority. This helps to define the boundaries and autonomy of the role.
4. Clarify Domains: Domains are the specific areas, contexts, or aspects of the organisation in which the role has authority. The role creator clarifies the domains associated with the role, which can include specific functions, teams, projects, or other areas where the role has responsibility.

5. **Role Review:** Once the role has been defined, it is typically reviewed by other circle members in a circle governance meeting. This review process provides an opportunity for feedback, questions, and clarification to ensure that the role is well-defined and aligned with the overall purpose and strategy of the organisation.
6. **Role Evolution:** Roles in Holacracy are not fixed, but are considered to be continuously evolving. As the organisation changes and new insights emerge, roles may be updated, refined, or even dissolved. The role review process provides a mechanism for ongoing refinement and improvement of roles over time.

It's important to note that in Holacracy, roles are not tied to specific individuals, but rather to functions or accountabilities within the organisation. This allows for flexibility and adaptability, as roles can be reassigned or adjusted as needed based on the organisation's needs and changing circumstances.

## **VI. What are some examples of roles in holacracy?**

In Holacracy, roles are defined based on the work that needs to be done within an organisation, rather than being tied to traditional job titles or positions. Here are some examples of roles that may exist in a Holacracy organisation:

1. **Circle Lead:** The Circle Lead is responsible for the overall leadership and stewardship of a circle, which is a self-organized team or unit within the organisation. They ensure that the circle's purpose is clear, that the circle is operating effectively, and that it is aligned with the organisation's overall purpose and strategy.
2. **Facilitator:** The Facilitator is responsible for facilitating meetings and ensuring that the Holacracy process is followed effectively. They guide the circle through the meeting process, facilitate discussions, and help to ensure that decisions are made using consent-based decision-making.
3. **Secretary:** The Secretary is responsible for documenting and maintaining the records of the circle's meetings, decisions, and governance documents. They ensure that meeting notes are taken, decisions are captured, and relevant information is properly documented for reference and accountability.
4. **Domain Lead:** A Domain Lead is responsible for a specific domain or area of expertise within a circle. They are accountable for the outcomes and performance of their respective domain, and they coordinate with other roles and circle members to ensure that work is effectively executed within that domain.
5. **Project Lead:** A Project Lead is responsible for leading a specific project or initiative within a circle. They define project scope, set objectives, coordinate resources, and ensure that the project is executed according to plan.
6. **Specialist Roles:** Specialist roles are roles with specific expertise or skills that are required within the organisation. Examples could include roles such as a Marketing Specialist, Finance

Specialist, IT Specialist, or HR Specialist, depending on the needs of the organisation.

7. **General Roles:** General roles are roles that are responsible for executing specific operational tasks or functions within a circle. These roles are typically defined to address specific work requirements and can include roles such as a Designer, Developer, Customer Service Representative, or Sales Representative.
8. **Circle Rep:** In Holacracy, Circle Reps play an essential role in facilitating communication and collaboration within and between circles. Here's how Circle Reps work together in Holacracy:
  - ❖ **Circle Representation:** Each circle typically designates a Circle Rep, also known as a Delegate, to represent their circle's interests and decisions in higher-level circles. The Circle Rep attends governance and tactical meetings of the higher-level circle to provide updates, present proposals, and participate in decision-making on behalf of their circle.
  - ❖ **Circle Governance:** Circle Reps are responsible for bringing governance proposals from their circle to the higher-level circle's governance meetings. They ensure that the proposals are aligned with the circle's purpose and are presented in a clear and actionable manner. Circle Reps also provide feedback and input on governance matters discussed in the higher-level circle.
  - ❖ **Circle Alignment:** Circle Reps help foster alignment and coordination between circles. They communicate decisions, updates, and relevant information from the higher-level circle back to their own circle. Circle Reps may also collaborate with other Circle Reps to resolve tensions and dependencies that arise between circles, ensuring smooth inter-circle dynamics.
  - ❖ **Circle Integration:** Circle Reps participate in the broader organisational governance processes to integrate their circle's needs and perspectives. They contribute to organisational-wide discussions, identify cross-circle dependencies, and collaborate on initiatives that require coordination across multiple circles.

By serving as a liaison between circles, Circle Reps help maintain a coherent and interconnected organisational structure in Holacracy. Their role is crucial for effective communication, decision-making, and alignment throughout the organisation's circles.

It's important to note that roles in Holacracy are dynamic and can evolve over time based on the organisation's needs, and circle members can hold multiple roles or rotate roles based on their skills, capacity, and interests. Roles are defined with clear accountabilities and authorities, allowing circle members to operate with autonomy and agility in their work.

## **VII. How is it decided who adopts which role in holacracy?**

When onboarding a new circle in Holacracy, the allocation of roles is typically done through a process called Role Selection. Here's an overview of how role allocation is decided in Holacracy:

1. **Role Identification:** The circle identifies the specific roles needed to fulfill its purpose and responsibilities. These roles should be clear, well-defined, and capture the necessary accountabilities within the circle.

2. Role Proposal: Anyone in the circle can propose themselves or others for a specific role. This proposal is typically made during a governance meeting where role assignments are discussed.
3. Role Qualifications: The circle engages in a discussion to evaluate the qualifications, skills, experience, and fit of potential candidates for each role. This discussion focuses on determining who is most capable and suitable for the role's accountabilities.
4. Role Election: The circle engages in a decision-making process to select the person who will fill each role. This decision-making process may involve consent-based methods, such as Integrative Decision-Making, where objections are raised and addressed to ensure broad agreement on the role assignments.
5. Role Assignment: Once the decision is made, the selected person becomes the Role Filler for the assigned role. They assume the accountabilities and responsibilities associated with that role and take on the role's authority to make decisions within its domain.

It's important to note that in Holacracy, roles are not assigned based on hierarchy or seniority but rather on the fit and capabilities of individuals for specific accountabilities. This allows for a more flexible and dynamic distribution of roles based on the organization's needs and the skills and interests of its members.