

Learning Holacracy Fundamentals Through Play

by Egill Rúnar Viðarsson

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Abstract

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“Little Bookcase Publications” is a four-player co-operative board game attempting to offer an experiential hands-on understanding of Holacracy fundamentals via contextualized simulation. Players act as partners at a small-scale publishing company and learn by role-playing Holacracy-inspired game-mechanics. In the literature review and primary qualitative data gathered via rapid ethnographic fieldwork it became apparent that organizations wanting to implement Holacracy can expect a steep, initial learning curve due to the rule-based – sometimes counter-intuitive – decision-making methods instilled in the method. Insights were gained from the field of organizational development, studies of role performance and play theory along with a design process which started as design-oriented research and then transitioned to research-oriented design. The final aim was to explore what fundamental processes and elements of Holacracy might be extracted to fit an introductory game to ease the learning of Holacracy.

Keywords: Holacracy, Organizational Development, Integral-Teal, Role Theory, Play Theory, Research-Oriented Design, Co-Operative Board Games.

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I Introduction

In the spring of 2016, I was contemplating what might be an interesting thesis project fit for a Master of Design degree in *Digital Futures* at OCAD University. Up until that point, I had noticed a rather unsustainable behavior pattern of mine that kept resurfacing when partaking in collaborative projects. While tending to my own specific contributions I seem to simultaneously try to mediate and empower different people's inputs towards actionable outcomes in order to move the overarching project forwards. Often, colleagues have not asked for any intermediary methods of this kind so this inclination can sometimes become quite overbearing. I had likewise observed how peers who welcomed such actions became somewhat dependent and expectant for continued initiatives. In a conventional organizational context this propensity might be seen as a managers' trait but the trouble is that I have little interest in assuming a future role that commands subordinates. Equally, having been part of numerous topic-wide meetings run under the guise that every participant had an equal say I noticed how such consensus-driven meetings are prone to end in stalemates with few, unclear actionable outcomes. Wanting to research a decision-making approach that was neither built on traditional hierarchies nor on consensus-driven "flat" methods, I envisioned: with the speed and integrative peer-to-peer possibilities of today's post-industrial and networked organizations, there has got to be a better way to organize and collaborate.

In narrowing down of the scope of the project I observed how companies and corporations can be viewed as networked *organizations* formed of individuals enacting roles via various decision-making structures. This document will hone in on a particular organizational structure called Holacracy: a peer-to-peer, iterative organizational system initially developed in the realm of

software development in 2001 and formally launched in 2007 by HolacracyOne – an organization spearheading the method’s development and adoption (HolacracyOne, n.d.). Often referenced as a software update to conventional management practices, Holacracy powers hundreds of organizations worldwide that favor continuous, adaptive iterations to both operational *and* organizational structures. When bootstrapping the method, authority figures sign the Holacracy constitution (HolacracyOne, June 15, 2015) and cede to its explicitly documented processes and methods any authority they might have had. Thus, a fundamental shift occurs where the decision-making power dynamics move from a single individual delegating authority to a process expressed by individuals stewarding multiple emergent roles. The increased leverage for individuals to affect organizational change sensed from their own grounded experience resurfaces the reciprocal relationship between governance and operations. In mimicking evolutionary algorithms of fractal hierarchies apparent in software and biological systems, Holacracy-run organizations facilitate integrative decision-making with autonomous individuals stewarding and evolving multiple roles in service of a collective purpose.

Via the literature review and primary qualitative data gathering it became apparent that organizations wanting to implement Holacracy can expect a steep, initial learning curve and some growing pains due to the sometimes counter-intuitive decision-making methods instilled in Holacracy. Media headlines such as “Can Holacracy Work? How Medium Functions Without Managers” (FastCompany, May 15, 2014) and “Say goodbye to hierarchy, hello to [H]olacracy” (Tossell, August 28, 2014) illustrate the polarized views when it comes to comparing prevailing governance systems to Holacracy: if you are not using bosses and hierarchy, you must be flat. Individuals comfortable with top-down structures and boss-subordinate relationships will require some “unlearning” (HolacracyOne, November 7 – 11, 2016) – i.e. letting go of previously held mental models – as the redistributed authority inherent in Holacracy might take some getting used to. Likewise, authority figures who tend to personally work around the vertical decision-making structures

in attempt to empower and nurture employees will realize that their efforts are rendered unnecessary in a new context founded on transparent rules documented in the Holacracy constitution.

During initial explorations for the thesis project, I was primarily interested in the benefits and challenges related to the practice of Holacracy. It became apparent, however, that due to the extensive on-boarding required of new practitioners it was difficult to compare the effects of different decision-making methods. With this particular information in mind, I will constrain most of the explorations and analysis of this study to the following research question:

Given that organizations wanting to implement a peer-to-peer organizational method like Holacracy are likely to expect an initial learning curve, how might its fundamental rules and elements be extracted as a role-playing game structure for on-boarding?

Several approaches have been utilized in an attempt to address this question. In “2.1 Holacracy – A Peer-to-Peer Organizational Method” a condensed literature review of *Holacracy: The new management system for a rapidly changing world* (Robertson, 2015) offers an overview of the method’s fundamental processes and the potential inclusions for an introductory board game. Additional sources surrounding the overall practice provide further insights into its opportunities and limitations as it becomes apparent that the peer-to-peer method is not a one-size-fits-all solution but a tool meant for autonomous decision-making confined within particular rule sets. In “2.2 Organizational Development” a deeper theoretical understanding of Holacracy and opportunities for implementation is provided. A short study of business consultant Frederic Laloux’s *Reinventing Organizations* (2014) reveals how similar approaches found within Holacracy are referred to as the *Integral-Teal* paradigm seen in organizational development theory. These insights are gathered to review not only how such approaches might fit within the field of broader organizational development but also to hint at potential situations and audiences where

Holacracy – and an introductory game to its processes – might seem more likely to function. Supplementary observations are collected from systems scientist Peter Senge’s *The Fifth Discipline* (2006) on *learning organizations* and systems-thinking, along with complex theory business consultants David J. Snowden’s and Mary E. Boone’s (2007) *Cynefin framework*. By positioning Holacracy as a tool allowing for iterative solutions to emerge in complex situations the systems-thinking perspective informs the reciprocal relationships apparent in the game-mechanics of “Little Bookcase Publications” that are necessary to simulate a suitable environment where the method might be applied.

Particular sources have been collected in “2.3 Role-Play” to substantiate the application of a role-playing technique for “Little Bookcase Publications” as well as explore additional perspectives that hint at potential correlations to Holacracy practitioners’ observed approach of stewarding and evolving multiple roles. Play theorists’ Huizinga’s (1949) and Caillois’s (2001 [1961]) classifications of play and games are reviewed in order to validate certain design decisions made in the realization of the introductory game. Influential sociologist Erving Goffman provides interesting observations in *Encounters: Two studies in the sociology of interaction* (1961) of how individuals perform a multiplicity of social roles based on diverse contexts such as focused encounters. Lastly, additional insights regarding roles and play will be provided via Waskul’s and Lust’s (2004) observations of the permeable relationships between the players and their enacted fantasy roles evident in the focused encounter of *Dungeons & Dragons* v.3.5.

The design process leading up to “Little Bookcase Publications” v.3.0 is documented in “3. Methodology.” Initially, the above literature review initiated the project which then demanded further primary qualitative data to be collected via fieldwork. Due to the limited time available, two *rapid ethnographic* techniques were utilized: a semi-structured interview with a current Holacracy practitioner and a non-participant observation of a key meeting process at a Holacracy-run organization. Millen’s (2000) “Rapid ethnography: time

deepening strategies for HCI field research” and Wasson’s (2000) “Ethnography in the field of design” prove helpful in validating such implementations. As the project progressed, and due to issues that became clear via the literature review and primary qualitative data collected, explorations of producing new knowledge via design experimentations would give way for its inverse technique of using research to develop further designs. In Daniel Fallman’s (2009) words, what might have started as *design-oriented research* – “...which seeks to produce new knowledge by involving design activities in the research process” (p. 194) – would later transition to *research-oriented design* – where “...research is used to drive and propel design” (p. 194).

Thus, the realization of an introductory game as a final output engaged an iterative design process where each subsequent prototype was informed by play-testers’ feedback on previous ones. This approach of *participatory design* (Stein et al., n.d.) can be seen as paralleling certain Agile design principles (Beck et al., n.d.) in the fields of software development and game design. Key design decisions are highlighted as they surfaced at certain intervals: during November’s five-day attendance at HolacracyOne’s Holacracy Practitioners Training in San Francisco where I demoed v.1.0 of the game with attendees; during HolacracyOne’s partners play-testing of v.2.0 in January without my presence; and lastly during a February session where I participated in playing v.2.5 of the game with my cohort members at OCAD University.

In “4. Findings” the culmination of “Little Bookcase Publications” v.3.0 is revealed as a synthesis of key observations and findings gained via the methodology and context review. I will review previously covered insights into the opportunities and limitations of Holacracy and how such a rule-based peer-to-peer organizational method is a particular tool meant for particular contexts. Lastly, I will further summarize what Holacracy concepts and elements extracted via the previously covered methods seemed to work well and not so well when developing an introductory game to Holacracy fundamentals. In “5. Conclusion” I will recap and review earlier chapters as well as highlight

potential for future research and design opportunities. Post-graduation, I aim to reach out to certified Holacracy providers such as HolacracyOne to propose further co-development of a role-playing board game serving as an introduction to the practice of Holacracy.

2 Context Review

I will provide a common grounding of what Holacracy is and how it relates to the fields of organizational development and system design. Moreover, I will explore potential correlations the method might have to play theory and role performance as such proposed connections proved insightful for later design development documented in “3. Methodology.”

2.1 Holacracy – A Peer-to-Peer Organizational Method

2.1.1 *How It Came to Be*

HolacracyOne, the organization spearheading the development of Holacracy, was formally launched in 2007 by Brian Robertson and Tom Thomison (HolacracyOne, n.d.). Along with other certified Holacracy providers, such as *dwarfs and Giants* (Austria), *Energized.org* (Netherlands) and *iGi Partners* (France), HolacracyOne provides coaching and implementation services to post-industrial organizations wanting to become more agile and responsive. The initial development of Holacracy dates back to 2001 and Robertson’s experiments using a software company he founded as a laboratory in his “... personal quest to find better ways to work together” (Robertson, 2015, p. 12). Robertson and his colleagues sought inspiration from numerous sources including: Agile software development’s values and principles (e.g., “...the best architectures, requirements, and designs emerge from self-organizing teams” and welcoming “...changing requirements [while] delivering working software early and frequently via iterative approaches” (Beck et al, n.d.); David Allen’s *Getting Things Done* methodology (Allen, 2015 [2001]) for further operational inspirations regarding individual self-organization and project management.

While the experimentation that led to Holacracy proved to be quite taxing, a core conclusion surfaced as well: within a primarily top-down systemic structure the constant trials of diverse, iterative and *inclusive* behavioral approaches tend to result as short-term bolt-on solutions (Robertson, 2015, p. 10) – merely relieving the symptoms and not getting at the root cause in the long-term. According to systems scientist Peter Senge, this is called *compensating feedback*, or “...when well-intentioned interventions call forth responses from the system that offset the benefits of the intervention” (Senge, 13%, location 1107). Being impatient for results is not helped as compensating feedback “...usually involves a ‘delay’ – a time lag between the short-term benefit and the long-term disbenefit” (Senge, 13%, location 1138). Robertson – who rejected the approach of conventional educational institutions and learned to read via programming-books instead (Ceo, 2015) – was frustrated with how equally difficult it can be to operate creatively within similar corporate structures. Every time he conceived of ideas for improvements, Robertson (2015) was required to seek permission from a boss, a boss’s boss and/or buy-in from multiple sources via consensus (p. 9). Climbing the corporate ladder did not resolve these issues either which led to Robertson (July 28, 2014) to jump to the top of the authoritarian pyramid and found his own software company. However, Robertson (2015) soon realized that with the overwhelming complexity landing on his desk with everyone now looking to him for permissions and solutions, he was still in the same system he strived to get out of (p. 9). Trying his best to be the caring, parent-like leader who is constantly attempting to empower others, Robertson claims he learned how such well-meaning approaches paradoxically victimizes subordinates when situated in a top-down management system (2015, p. 22). Robertson (July 28, 2014) mused “[t]here’s got to be a better way,” and turned his software company, Ternary Software, into a laboratory from which Holacracy would eventually emerge.

2.1.2 *What It Is and What It Is Not*

The Holacracy name is derived from Arthur Koestler's *Ghost in the Machine* (1967) wherein he coined the term *holarchy*, or the connection between holons where each holon "...is a part of a larger whole" (Robertson, 2015, p. 38). In a Holacracy-run organization's governance structure, the fundamental holons or units are its various functions encapsulated as *roles* which individuals – as autonomous entities separate from the organization – choose to steward and maintain. Decision-making authority is therefore not distributed to individuals but to the roles they fill across the organization. What makes this approach different to a conventional organization chart – where individuals indeed steward roles and operations as project manager, designer or CEO – is how practitioners of Holacracy create, maintain and fill *multiple* roles instead of only one. Moreover, the roles and their descriptions are required to be documented transparently and explicitly in the organization's governance records. HolacracyOne provides existing – or prospective – Holacracy-run organizations access to a free online software platform, *GlassFrog*, to document their governance records and capture any changes made in governance meetings (HolacracyOne's GlassFrog Circle, n.d.).

Each role description is made up of a meaningful *purpose*, ongoing *accountabilities* expressing said purpose through operational work, among with any potential domains. As an example, according to the current state of *Washington Tech Solutions'* (WaTech) governance records accessible at their online GlassFrog account (Washington Tech Solutions, March 6, 2017) there is a role named "Printer Gods." This role's purpose is "...[m]aintaining and updating print servers" by "...[u]sing all tools including the printer web GUI to configure the printers and using Clear Print Tool to clear individual printer queues." To enact these role descriptions the roles' stewards self-organize in capturing operational *next-actions* and *projects* that require multiple next-actions. This approach is borrowed directly from the *Getting Things Done* methodology (Allen, 2015 [2001]) and is systemically documented in the Holacracy constitution (HolacracyOne, June 15, 2015).

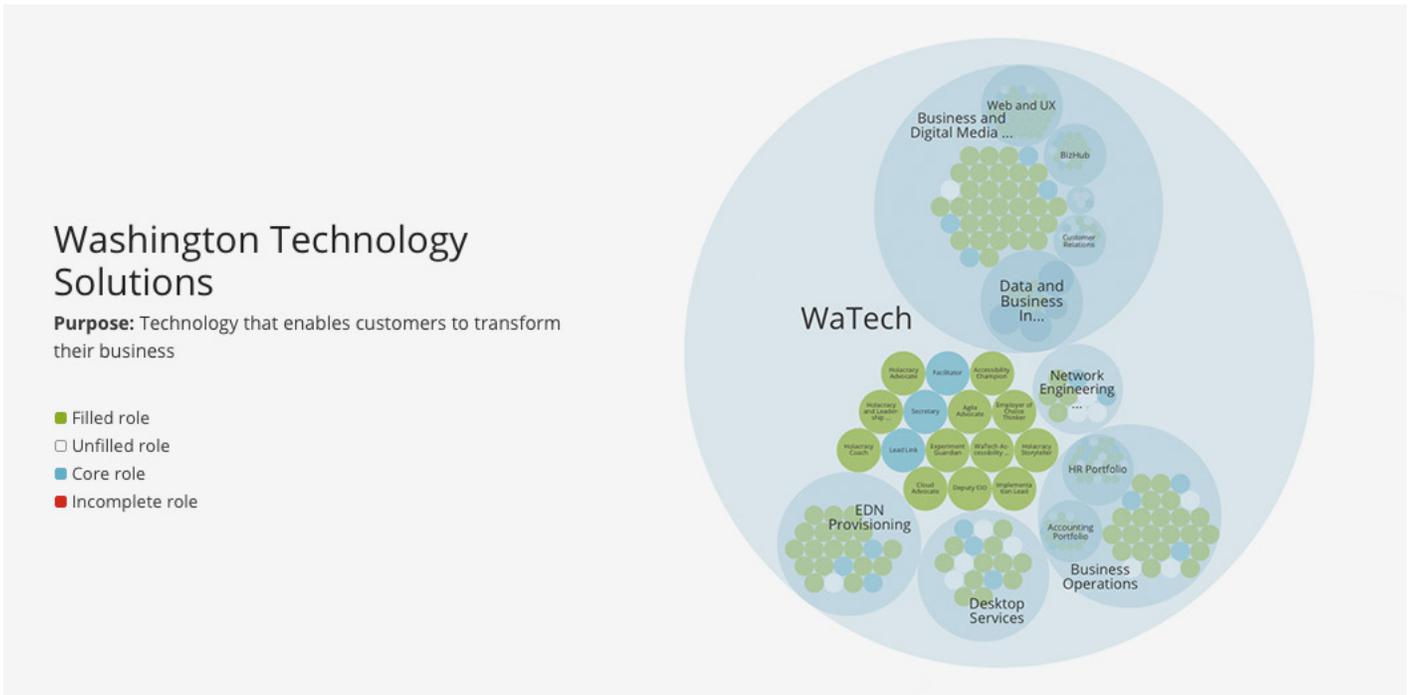


Figure 1 A screenshot of WaTech Holacracy governance records, documented at the organization’s GlassFrog account (Washington Tech Solutions, March 6, 2017).

It would seem that the increased leverage for individuals to affect organizational change sensed from their own grounded experience of doing operational work resurfaces the reciprocal relationship between governance and operations. Whenever the accountabilities “...attached to a role become too much for one individual to carry, that role may further need to break itself down into multiple sub-roles, becoming a ‘circle’” (Robertson, 2015, p. 39). Unless otherwise stated, roles within circles automatically adopt any of their parent accountabilities and domains. This multi-role approach tends to allow individuals to strive for more wholeness as they can offer more than one portion of themselves which leads them to “...act more like free agents [...] able to accept role assignments anywhere in the organizational structure” (Robertson, 2015, p. 39). Using WaTech’s governance records as a further example, a partner might simultaneously fill a “Billing Buster” role specific to a “Business and Digital Media Services” circle while also stewarding the role of “Holacracy Coach” residing within the organization’s outermost circle or *anchor circle*. For individuals like myself who tend to wear many hats when working on projects and lean towards being a jack of all trades, this multi-role structural feature of Holacracy seems particularly intriguing.



Roles

WaTech

- Agile Advocate
- Business and Digital Media Services
- Cloud Advocate
- Deputy CIO
- Employer of Choice Thinker
- Holacracy Advocate
- Holacracy and Leadership Coach
- Holacracy Coach
- Implementation Lead
- Lead Link
- Secretary

Business and Digital Media Services

- Billing Buster
- Business strategy
- Circle Champion
- Commercial product engineer
- Contract Captain
- Contract Liason
- Customer Relations
- Intern Coordinator
- Lead Link
- Pencil Whip
- People person
- Product development wizard
- Space Ace
- Standards Steward
- Wecords Wangler

BizHub

- BizHub Project Sponsor

Customer Relations

- CAM Coach
- Lead Link

Data and Business Intelligence

- FILLS NO ROLES

WWA

- FILLS NO ROLES

Integration Services

- FILLS NO ROLES

Accounting Portfolio

- FILLS NO ROLES

HR Portfolio

- FILLS NO ROLES

Data Management

- FILLS NO ROLES

Desktop Services

- FILLS NO ROLES

Business Operations

- FILLS NO ROLES

Network Engineering and Architecture

- FILLS NO ROLES

EDN Provisioning

- FILLS NO ROLES

Enterprise Reporting

- Circle Watcher

Figure 2 An individual's many roles at WaTech. A screenshot of the organization's GlassFrog account (Washington Tech Solutions, March 6, 2017).

The authority practitioners have in stewarding their roles is not tied to whatever implicit expectations the roles' names might espouse but is instead documented as explicit role descriptions. These are continually evolving and transparently archived in the organization's governance records via processes and rules set forth in the Holacracy constitution (HolacracyOne, June 15, 2015). Currently at version 4.1, the Holacracy constitution is an open-source document on *Github*, "...licensed under a Creative Commons Attribution-ShareAlike 4.0 International License" (HolacracyOne, June 15, 2015). When unsure of how to proceed with an idea in any of one's roles, the rule of thumb is that you can do whatever you deem appropriate in expressing the purpose of your role as long there is not an explicit rule against it documented either in the organization's governance records or the Holacracy constitution. As we will see in a later chapter, this newfound freedom can be either liberating or daunting depending on who you ask and their experience with Holacracy.

For organizations wishing to adopt Holacracy, the constitution fundamentally shifts the seat of power “...from the person at the top to a *process* [and] once formally adopted, the Holacracy constitution acts as the core rulebook for the organization” (Robertson, 2015, p. 21, emphasis in original). Indeed, the very first step CEOs are constitutionally required to take when implementing Holacracy is to sign the Holacracy constitution’s last page declaring that they “...cede his or her power into its rule system [thus paving] the way for an authentic distribution of power through every level of the organization” (Robertson, 2015, p. 22). The aim is to have power and processes for decision-making situated in a transparent process instead of individuals adhering to the whims of another. In *Facilitator’s Guide to Participatory Decision-Making* (Kaner, 2014) – which incidentally was used to develop the Holacracy meeting formats (Robertson, July 28, 2014) – Kaner explains how confusing it can be when group meetings have inconsistencies due to ambiguous *decision rules* which illustrates “...a need for a clarified procedure” (p. 348). An example of such a process is a Holacracy governance meeting (see *Appendix A*) which round-based structure is meant for individuals to propose governance changes on the fly based on conflicts they have experienced. Keeping things on track, an individual stewarding the role of Facilitator (see *Appendix A*) guards and guides the governance meeting process by assuming the stance of a neutral referee in combating a meeting format where the loudest, most stubborn individuals get their way through forceful ways. The somewhat counter-intuitive accountability of the Facilitator is not to personally make sure everyone has had their say but instead to regard the process as a sacred space which individuals are invited to partake in. The archival-esque role of the Secretary (see *Appendix A*) captures all proposed changes processed via the meeting’s necessary steps which then incrementally evolves the organization’s governance structure.

Similar to many games that might have a multi-page manual to explain their intricate rules, reading the Holacracy constitution can only do so much in learning how the actual practice works. Moreover, when learning a new system – be it Holacracy or a board game – you are likely to run into trouble if you

are willing to play only by some of the rules and ignore other parts. This is one of the primary reasons why initial periods of adoption are likely to cause dips in productivity and a potential rise in start-up costs due to coaching services. Therefore, the research question for this particular thesis revolves around attempts at easing these initial cognitive and economic costs via low-risk, contextualized gameplay of Holacracy fundamentals.

The Holacracy method is arguably quite a different management system compared to what many might conceive of how many organizations are run. One of HolacracyOne's partners, Olivier Compagne, demonstrates that there seems to be a "...widespread lack of clarity about where Holacracy stands with regard to traditional hierarchies AND flat organizations" (March 18, 2014, capitalization in original). What Compagne is referring to are misconceptions about Holacracy that likely stem from the method's rule-based, peer-to-peer dynamic structures and processes being reflected neither in top-down nor flat hierarchies. Kevin Joyce at ARCA, a Holacracy-run manufacturer of cash transaction devices, argues that he would "...not emphasize the idea that we are getting rid of bosses, because I think it sets people up for confusion or disappointment when a lot of managerial work is still happening" (Hansen, June 22, 2016). The difference is that this managerial work – which includes but is not limited to accountabilities such as budget allocation, priority setting and providing feedback – is not vested in a classical *person-as-manager* archetype, but is instead distributed through various relative roles of the organization.

Compagne remarks that in order to understand how Holacracy works, a differentiation between *hierarchy* and *structure* needs to be made, for "...absence of hierarchy does not necessarily mean no structure" (Compagne, March 18, 2014). In organizational context, these two terms are often interlinked and eliminating a formal structure does not necessarily eliminate hierarchy for it might replace "...the formal structure with an implicit, hidden one that's much harder to change" (Compagne, March 18, 2014). Senge (2006) observes that "...*structure* in complex living systems, such as the 'structure' of the multiple 'systems' in a human body [...] means the basic interrelationships that control

behavior” (10%, location 822, emphasis in original). As human organizational systems are fundamentally structured around decision-making, “...redesigning our own decision making redesigns the system structure” (12%, location 1072). Thus, to assume the stance of Holacracy practitioners when faced with a tension is not to react impulsively or criticize those who do but instead realize how their current governance structure “...produces behavior, and changing underlying structures can produce different patterns of behavior” (12%, location 1070).

Robertson offers a helpful comparison of decision-making structures when referring to organizational theorist Elliott Jaques’s three distinctions of *formal structure*, *extant structure* and *requisite structure*. The formal structure in conventional organizations – or the delegation of authority via top-down decision-making structures – is represented as the familiar pyramid-shaped organizational chart and static job descriptions. Inherent issues derived from the seemingly inflexible nature of this particular structure invites occurrences of miscommunication between different levels. Indeed, one of Jordan’s and Lambert’s (2009) findings in their ethnographic study of Intel’s branches in Malaysia and Costa Rica revealed “...there was a deep rift between the *upstairs* world of the engineers, planners and administrators and the *downstairs* world of the operators and technicians” (p. 17/35, emphasis mine). Likewise, business writer Gary Hamel writes how “...the most powerful managers are the ones furthest from frontline realities. All too often, decisions made on an Olympian peak prove to be unworkable on the ground” (Hamel, December, 2011). In cases where the formal structure offers little or outdated guidance, or imposes bottlenecks to information and decision-making flow, employees working around the formal structure form an extant structure, “...the often implicit reality of who’s making what decisions or who owns which projects” (Robertson, 2015, p. 36). Jordan and Lambert further discovered how employees were relying on “...personal networks, and the ‘favor economy’ to get things done” adding that within the observed decision-making structures such “... interpersonal relationships are of paramount importance for managing operational problems” (2009, p. 9/35).

Then, a requisite structure is the structure that “...wants to be [or] the structure that would be most natural and best suited to the work and purpose of the organization” (Robertson, 2015, p. 36). Defining creative tension as a sensed gap between what *is* and what potentially *could be*, Robertson compares this capacity to Jaques’s organizational structure context in “...we’re sensing a gap between the extant structure (what is) and the requisite structure (what could be)” (2015, p. 37). Unless one has a higher up position in the formal, top-down structure of a conventional hierarchical organization, influencing the underlying structure is arguably difficult. While removing the structure altogether and giving all an equal say via consensus might bring a temporary remedy to such a tension, an implicit power-struggle structure can form in its stead becoming a culturally unconscious “...way things are done” (Robertson, 2015, p. 36). To have a voice is one thing, but to be able to act in service of said voice is another. To those who wish to process their sensed tensions and evolve “...the formal [governance] structure to be more requisite” (Robertson, 2015, p. 37), Holacracy attempts to offer pathways and processes such as the governance meeting (see *Appendix A*). Another meeting process provided by the system is a tactical meeting (see *Appendix A*) which serves as a scheduled fallback to review operational work. This distinction between governance and operations is quite important as the system attempts to highlight their difference but yet also underline their reciprocal relationship. In other words, since the fundamental unit in the formal structures of Holacracy organizations are not individuals but the roles they fill, the changes and amendments to the organizations’ governance is an ongoing evolutionary process of continually creating, updating or removing elements in response to grounded tensions sensed in extant structures to service the organization’s overarching purpose.

Thus, Holacracy is not for organizing a group of people but for organizing roles around the work required, and these roles exist as parts of an organizational entity that people choose to energize and maintain. This critical distinction of considering practitioners as stewards of diverse roles at Holacracy-run organization is not dissimilar to how role-playing games depend on players

assuming roles in order for them to function. Comparing this stance to Erving Goffman's (1961) observations of how a "...social group may be defined as a special type of social organization" (p. 9) where basic elements are usually seen as individuals, in Holacracy it differs as it is individuals through their roles who "...perceive the organization as a distinct collective unit apart from the particular relationships the participants may have to one another" (Goffman, 1961, p. 9). Therefore, Holacracy is not of the people, by the people, for the people but "...of the Organization, through the People, for the Purpose" (HolacracyOne, November 7 – 11, 2016).

This shift from individuals to roles can prove quite jarring – particularly for many relationship-driven organizations that might have a longstanding intimate culture of compassion and warmth. This particular response was evident for David Allen and his staff when they were first implementing Holacracy at David Allen Company in 2011 (Sarder, July 31, 2015). However, as they gained experience with the structure of roles and the method's integrative processes – whose "...point is not to seek the personal consent of people [but] to ensure that the focus is only on what's needed for the organization to express its purpose, given the concrete needs of its roles" (Robertson, 2015, p. 199) – they realized their previous culture-building extant structure was in fact developed to work around the formal structure of top-down hierarchy. Allen shares that "...[i]n an operating system that's dysfunctional, you need to focus on things like values in order to make that somewhat tolerable" (Laloux, 2014, p. 229), adding that "... it is an inappropriate use of love and care to *use* love and care to get something done" (Robertson, 2015, p. 199, emphasis in original).

Debatably, this is also true for social relationships of many kinds, and brings to mind my own personal struggle with my reactive-disguised proactive initiatives of empowering peers that don't need or want to be individually empowered. For prospective Holacracy practitioners, these approaches require some letting go of, as "...behavior that is healthy in a pathological environment becomes pathological in a healthy environment" (HolacracyOne, November 7 – 11, 2016). After a few years of practicing Holacracy, partners at David Allen Company

have moved past using compassion and relationships as leverage for doing operational work which has resulted in a much more authentic, emergent culture and principles (Laloux, 2014, p. 229).

2.1.3 *Common Benefits and Difficulties of Adoption*

To date, according to HolacracyOne's GlassFrog website (GlassFrog, n.d.) there are hundreds of organizations of various sizes worldwide practicing Holacracy across numerous industries such as retail (*Zappos (US)*), health and fitness (*Precision Nutrition (CA)*), finance (*ARCA (US)*) and even state government IT division (*WaTech (US)*). Due to the Holacracy constitution being open-source – and considering not all organizations openly disclose how they operate and govern – the total number of organizations running on Holacracy is unclear. While each organization practicing Holacracy might approach the processes in significantly different ways, they all base their governance and operations on the same basic underpinnings laid out in the Holacracy constitution.

Surely, it might prove quite the cognitive leap to move away from a static job description and instead break down incrementally one's operational skills and functions into multiple dynamic roles. Many Holacracy practitioners taking their initial steps in thinking from the perspective of diverse roles see how this approach can help contextualize and clarify their sensed tensions and proposals to other individuals in their respective roles (Energized.org, July 7, 2016). Kristy Meade, a speaker and corporate trainer, argues how the Holacracy facilitation of integrative processes can work against unconscious gender bias by giving everyone wanting an opportunity to share *and* process their tensions for their continually evolving roles' accountabilities (Meade, September 11, 2014). Some note strong similarities between Holacracy and DevOps (i.e., "...a type of agile relationship between Development and IT Operations [...] advocating better communication and collaboration between the two business units" (Beal, V., n.d.)) as both models prefer roles over job titles where self-organizing teams

continually sense and iterate on workable solutions via distributed hierarchy and transparency of data (Beal, H., July 8, 2016).

For others, however, it can prove too difficult to not be empowered by a mentor-like leader or to self-organize their operational duties and multiple roles in alignment with relatively strict processes detailed in the Holacracy constitution. Bud Caddell, founder of NOBL consultancy, critiques retailer Zappos's implementation of Holacracy in 2013 and argues how the *Integral-Teal* approaches of Holacracy and other methods documented in Laloux's *Reinventing Organizations* (2014) are "...compelling ideas, [but] they are patently unsafe for existing businesses to adopt" (Caddell, January 18, 2016). He adds that for many employees "...Zappos had been this ideal workplace where employees were put first, and then suddenly that care and generosity had been withdrawn" (Caddell, January 18, 2016). Tony Hsieh, the currently unassuming CEO of Zappos, first experimented with Holacracy in piloting an implementation of the method in a small department before rolling it throughout Zappos (Robertson, 2015, p. 148). The manner of which the greater implementation was undertaken seems to be the main concern for Caddell's critiques. Bernstein et al. reveal in a *Harvard Business Review* article how Hsieh "...offered severance packages to all employees for whom self-management was not a good fit – or who wished to leave for any other reason. Although most decided to stay, 18% took the package, with 6% citing [H]olacracy" (Bernstein et al., July 2016). Caddell – along with other consultants such as Daniel Mezick – critique Hsieh's approach of issuing such a mandate with Mezick stating that "...[m]andating a process change is a recipe for disaster [for] [e]ngagement drives everything, and mandates kill engagement" (Mezick, March 4, 2014). Incidentally, Mezick's argument can be viewed as echoing play theorists Huizinga's and Caillois's classifications of play and how play needs to be voluntary. A system or a "...game which one would be forced to play would at once cease being play [for it] would become constraint, drudgery from which one would strive to be freed" (Huizinga, 1949, p. 7). Could it be that the value-driven culture at Zappos obscured to employees Tony Hsieh's underlying

structural accessibility to be able to make a top-down decision? So, when acting on said authority given to him via the formal structure, might it have thrown employees off similar to when a child suddenly becomes aware of their parents' apparent authority over them when they raise their voices or scold them?

In response, Matt Dunsmoor at Zappos describes his own experience of the Zappos's shift to Holacracy in a blog post titled "Thanks For All Your Concern, But..." (September 14, 2015). He notes how "...everyone on the outside saying what the facts are and very few people on the inside speaking up, finding the line between truth and mere conjecture is increasingly difficult." On the topic of how Zappos's staff is holding up practicing Holacracy, Dunsmoor provides the following comment:

(Dunsmoor, September 14, 2015)

80% of these issues are people-based, not system-based; that is to say that Holacracy is being blamed in many scenarios where there is a communication/trust/relationship breakdown at fault or someone is misusing the system (whether by intent or not). In any management system throughout history there have always been people who politick, side-step accountability and bend the rules in their favor. Since this shift, it just seems like this behavior is being forced out of the shadows at a higher rate than before.

It can prove quite an eye-opener for those individuals who are as equally used to and frustrated by the bottleneck limitations of delegated authority in conventional management hierarchies when they realize that unless there's an explicit rule against it either in the Holacracy constitution or in their own governance records they have full autonomy to do whatever they deem fit to express their Holacracy roles. They don't have to seek permission from a boss or buy-in from peers, and if their actions will surface any tensions for other roles their stewards can raise it in a governance meeting to update their governance records to represent a potential solution. In a *Forbes* article on Holacracy, author Drew Hansen interviews a few Holacracy practitioners where they illustrate

how critical it is for partners to be “...self-reliant, [able] to follow a self-directed work plan and negotiate with peers” (Hansen, June 22, 2016). Noted in a separate article, as the power dynamic shifts “...[f]ormer employees [...] often have a hard time acting with independence and embracing this new paradigm” (Energized.org, July 7, 2016). Habits are hard to break, and these employees-turned-partners might still look to management for directions. Likewise, individuals that are used to being a part of the decision-making provided in mid-level or top-level management will need to “...learn how to let go of things, to more often take an observer’s chair, to allow for emergence and evolution” (Energized.org, July 7, 2016). Joyce at ARCA observed in their Holacracy implementation that while some former managers tried to maintain any explicit or implicit control they had before, others embraced the system and now trust its processes and the distributed authority to get things done (Hansen, June 22, 2016).

The following chapter will be dedicated to situating Holacracy as a management system relevant for post-industrial organizations, and revealing potential causes for opportunities and difficulties when implementing the method. Moreover, this will further hint at potential target audiences that might be willing to utilize the design output’s introductory play elements to learn Holacracy fundamentals.

2.2 Organizational Development

In contextualizing what Holacracy is as a management system and how it compares to other models, I look to business consultant Frederic Laloux’s contribution, *Reinventing Organizations* (2014), to the field of organizational development theory. This particular inclusion assists in providing additional knowledge concerning potential reasons why Holacracy as an organizational practice tends to work better for some organizations and not so well for others. Moreover, it can highlight potential target audiences for the introductory game. I will also explore how Holacracy might be viewed as a method more

suitable for a *Complex* context defined in Snowden's and Boone's (2007) *Cynefin* framework. Likewise, Senge's (2006) observations of the complex interrelationships inherent in systems provide additional knowledge concerning both the concept of *learning organizations* and potential concepts to help realize game-mechanics serving as an introduction to Holacracy.

2.2.1 *Updating Organizations as Integral-Teal*

A particular field of study related to organizational development is derived from developmental psychology which entails that in the roughly 100,000-year history of humanity we have "...gone through a number of successive stages" (Laloux, 2014, p. 5), where a subsequent stage transcends and includes the one before it. With each stage there are significant improvements added in cognitive, moral and psychological abilities of humans when dealing with the world. An important contribution of Laloux's is the observation that "...every time humanity has shifted to a new stage, it has invented a new way to collaborate, a new organizational model" (2014, p. 5). Some might say that it is the other way around – i.e., new collaboration technology changes mindsets – but as systems scientist Peter Senge (2006) explains, both viewpoints might be equally true in being two halves of the same feedback-loop system:

(16%, location 1408)

The key to seeing reality systemically is seeing circles of influence rather than straight lines. This is the first step to breaking out of the reactive mindset that comes inevitably from "linear" thinking. [...] By tracing the flows of influence, you can see patterns that repeat themselves, time after time, making situations better or worse.

Realizing that the topic of developmental theory is truly a vast and complex one – with naming conventions not exactly uniform or standardized – I will work from Laloux's concepts of particular developmental stages to situate and compare how the practice of Holacracy differs or conforms to other approaches. Laloux has built these particular definitions on top of specific works of Ken

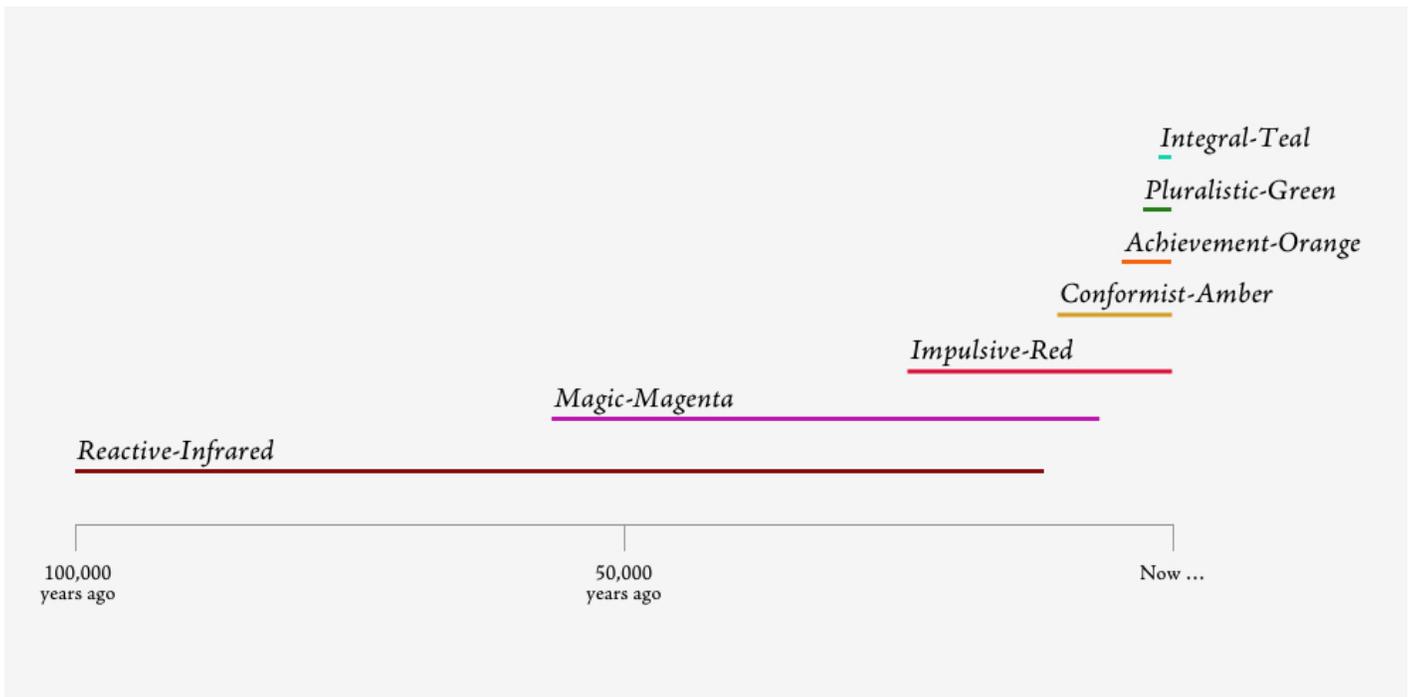


Figure 3 Timeline of organizational evolution adapted from Laloux's *Reinventing Organizations* (2004, p. 35).

Wilber, a philosopher and theoretical psychologist, and Jenny Wade, who specializes in developmental psychology. The labels of the seven organizational development stages covered by Laloux are based on Laloux combining Wilber's light spectrum color definitions with his own observation of the primary organizational function at each given time. Here, I will pay particular attention to *Integral-Teal* – the most recent and pertinent to the post-industrial practice of Holacracy. That being said, it is worth noting that the inclusion of this particular perspective has a potential bias in favoring particular approaches of the *Integral-Teal* paradigm. Indeed, due to Laloux's work being realized in a Western context there have been some critiques of when he writes of *Integral-Teal* being the next stage in the human consciousness (see 5.2 *Future Research*). Although, Laloux observes that "...[n]ever before in human history have we had people operating from so many different paradigms all living alongside each other" (2014, p. 35). This brings us to the important notion of refraining from referring to the successive stages as labels for declaring some people being somehow better than others. A more helpful approach might be to realize that some stages are "...'more complex' ways of dealing with the world" and that "...each stage is well adapted to certain contexts" (2014, p. 37). To complicate

matters further, an individual can operate from multiple stage-roles depending on context:

(Laloux, 2014, p. 38)

There are many dimensions of human development – cognitive, moral, psychological, social, spiritual, and so on – and we don't necessarily grow at the same pace in all of them. For example, we might have internalized Orange cognition and be running an innovative business, but on the spiritual side, we espouse an Amber Christian fundamentalist belief.

Being mindful of this notion might help to better understand possible reasons and opportunities when individuals and organizations have trouble moving to or operating from peer-to-peer *Integral-Teal* paradigms. As the number of people per societal groups grows within each paradigm, more ways to address complexity are introduced along the way. In *Impulsive-Red*, the self starts to distinguish from others which in turn creates initial role-division of labor and proto-empires. In *Conformist-Amber*, the understanding of long-term linear causality contributes to more granular role-division and surplus of resources via the invention of agriculture. The Age of Enlightenment ushers in *Achievement-Orange* and scientific investigation, innovation and further questioning of religious figures in power. As innovation and striving for growth for growth's sake via strictly scientific methods can often come with substantial environmental and ethical costs, the *Pluralistic-Green* further criticizes the previous paradigm's devaluing of moral and art spheres and instead emphasizes relationships over outcomes. Moreover, due to the previous paradigm's fixation on structures and rules affiliations to these notions are vague and conflicted with many taking a nihilist approach of discarding them altogether choosing to operate instead from a flat structure and consensus. As Laloux observes, within each paradigm a prevailing organizational structure seems directly related to these concepts. Indeed, when any group of people comes together to collaborate regardless of the overarching structure – or lack thereof – there are persistent questions and considerations that are difficult to avoid. For even if "...we don't

discuss them, we make assumptions about the answers [...] In many situations, implicit governance works just fine – until, for some reason, it doesn't anymore" (Robertson, 2015, p. 29).

The next stage of organizational development, *Integral-Teal*, critiques its predecessor's absence of alternatives offered to the dominator hierarchies, and "...involves taming our ego and searching for more authentic, more wholesome ways of being" (Laloux, 2014, p. 6). The three breakthroughs for organizations operating this way, Laloux observes (2014, p. 56), are: autonomous *self-management* distributed via transparent, systemic structures based on peer-to-peer relationships transcending and including both boss-subordinate and consensus systems; striving for *wholeness* by arriving to work with more than just one narrow, professional self; 3) viewing the organization as having a life of its own by inviting members of the organization to sense on its behalf and dynamically steer and rapidly iterate towards an *evolutionary purpose*. It's interesting to contemplate how current technological advances such as peer-to-peer networked complexities and communicative speed of the Internet might have potentially contributed to this increased awareness of others and the demand for accessible information. In iterative fashion, individuals operating from this paradigm prefer to consider a journey-of-unfolding worldview where "...if something unexpected happens or if we make mistakes, things will turn out all right, and when they don't, life will have given us an opportunity to learn and grow" (Laloux, 2014, p. 44). These viewpoints seem to resonate with Holacracy as an overall practice, but also with certain Eastern and indigenous wisdom traditions where the goals leading to a good life are not through wealth, success and belonging, but to instead "...pursue a life well-lived, and the consequence might just be recognition, success, wealth, and love" (Laloux, 2014, p. 45). John Mackey, co-CEO of Whole Foods, remarks that an organization "...has to make money just like my body has to make red blood cells if I'm going to live. But the purpose of my life is not to produce red blood cells. My purpose is more transcendent than that" (Green, n.d.). Echoing this statement in an interview, Robertson explains that "...Holacracy is ruthlessly purpose-driven

and all the rest is an interesting outcome of that. The financial performance [is a] useful tool, but it's not the purpose of a business," adding, "...when you focus on that you actually hinder – ironically – the very thing you're seeking" (CEO, May 27, 2015).

Thus, an employee-turned-partner at a company running on Holacracy ultimately strives to fulfill the organization's higher purpose. She does this not only by self-organizing her operational work in expressing the purpose and accountabilities of her various roles, but also by evolving said roles incrementally by sensing and resolving on their behalf any conflicts that can be used as learning opportunities. Compared to the industrial, often machinist-like standpoint apparent in the *Achievement-Orange* paradigm – where a master designer maps out every part in their quest of a complicated deviant-free system – Holacracy practitioners and those who operate primarily from *Integral-Teal* perspectives seem to accept that many of today's forward-thinking organizations have moved past *complicated* systems and have become *complex* systems. Laloux elaborates on how additive, constructivist methods outmaneuver subtractive, deconstructivist ones in such contexts:

(Laloux, 2014, p. 211, emphasis in original)

In such systems, it becomes meaningless to predict the future, and then analyze our way into the best decision. When we do, out of habit, we only waste energy and time producing an illusion of control and perfection. Teal Organizations make peace with a complex world in which perfection eludes us. They shoot explicitly not for the best possible decision, but for a workable solution that can be implemented quickly. Based on new information, the decision can be revisited and improved at any point.

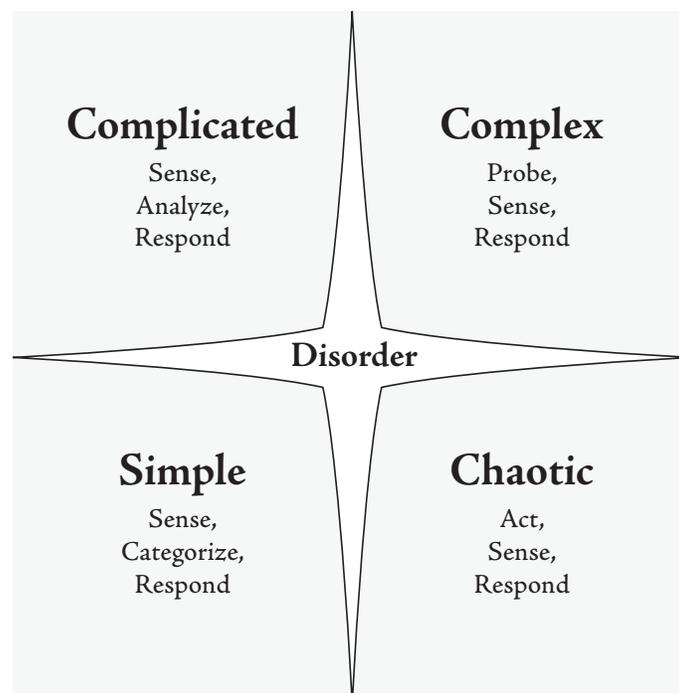
Hence, the *Integral-Teal* practice specific to Holacracy tends to resonate with certain creative individuals operating in complex environments with multiple inputs of required transparent information that can be realized as potential outputs. Not as outcome-oriented as practitioners of *Achievement-Orange* nor as fixated on *Green-Pluralistic* values and relationships, individuals operating

from an *Integral-Teal* context don't mind failing as long as they have an actionable path or process to integrate the learning garnered from previous experiences in iterating further ideas. To practice such a mindset requires discipline and mastering a discipline requires continued practice and patience. In the next section, I will uncover certain methods and frameworks that might help individuals orient themselves when operating within today's complex post-industrial organizations.

2.2.2 *The Cynefin Framework's Complex Context*

Regarding Laloux's claims on how some stages of consciousness and methods of collaboration are more suitable depending on particular contexts, David J. Snowden's and Mary E. Boone's (2007) *Cynefin* situational framework provides an interesting perspective. The authors argue how conventional management concepts are often "...grounded in Newtonian science [which] encourages simplifications that are useful in ordered circumstances" (p. 69). With the increasing complexity in today's interconnected world, however, oversimplifications are prone to failure. What seems to be needed for leaders today is a "...deep understanding of context, the ability to embrace complexity

Figure 4 Cynefin framework adapted from Snowden & Boone's "A Leader's Framework for Decision Making" (2007, p. 71).



and paradox, and a willingness to flexibly change leadership style” (p. 76). Thus, the aim of the *Cynefin* framework is to sort “...issues facing leaders into five contexts defined by the nature of the relationship between cause and effect” (Snowden and Boone, 2007, p. 69) with the context of *Disorder* meaning not knowing in which of the other four one is situated. Here, I will focus on the framework’s *Complex* context as I note interesting similarities to the previously covered *Integral-Teal* organizational paradigm which parallels many methods in Holacracy.

When decisions are often being made based on incomplete or fluctuating data variables, it is likely the subjects are situated in the *Complex* context. It is the area of unknown unknowns where “...large numbers of interacting elements” (p. 70) depict cyclical cause-and-effect relationships which can only be understood in retrospect. To let instructive patterns *emerge* dynamically in a system which whole is greater than its parts, the preferred method is an iterative “...probe first, then sense, and then respond” (p. 72). To organize and operate this way requires patience and solutions cannot be imposed. Moreover, as dissent and debates are considered valuable assets to “...encourage the emergence of well-forged patterns and ideas” (p. 73) this context also requires tolerance, acceptance and methods for harnessing conflict resolutions in evolving the elements and surrounding environments. Individuals who are uncomfortable with confrontations and the experimental nature required of *Complex* contexts are likely to tread around the issue or becoming impatient and demand fail-safe business plans and predictive outcomes. Thus, “...[l]eaders who try to impose order in a [*Complex*] context will fail, but those who set the stage, step back a bit, allow patterns to emerge, and determine which ones are desirable will succeed” (p. 72, emphasis mine). This argument seems to mirror the previously covered approaches necessary for successful Holacracy implementations.

In reviewing Snowden’ and Boone’s writings, I note a motivating comparison to my design output’s aim of simulating a fictional game context to introduce Holacracy. The authors share how a metaphorical game they created “...based on the culture of a real client organization [...] increases managers’ willingness

to experiment, [allowing] them to resolve issues or problems more easily and creatively” (p. 71). In order to figure out ways to set a play stage fit for such a purpose the following section will further explore interrelationships inherent in organizational systems. Their study provides useful perceptions that feeds into the realization of potential game-mechanics covered in a later chapter.

2.2.3 *Reciprocal Relationships in Systems-Thinking*

Peter Senge, a systems scientist and senior lecturer at MIT, published in 1990 the first edition of his book *The Fifth Discipline* wherein the term *learning organizations* was popularized. In fact, due to Senge’s influential contributions a second version, *The Fifth Discipline: The Art and Practice of the Learning Organization* (2006) was published to which I will be referring here. Being fascinated by the “...connections between personal learning and organizational learning, in the reciprocal commitments between individual and organization” (2%, location 253), Senge echoes Laloux’s and others’ viewpoints shared earlier that the conventional top-down management approach tends to restrain people in today’s dynamic, complex and interconnected world. In other words, as organizations “...are becoming more networked [they are] weakening traditional management hierarchies and potentially opening up new capacity for continual learning, innovation, and adaption” (1%, location 120). Mirroring the additive principles of Agile software development of preferring frequent *workable* solutions as opposed to masterfully arranging a *perfect* one, Senge explains how a learning organization strives for “...continually expanding its capacity to create its future” (4%, location 375). Moreover, for a learning organization, survival learning or *adaptive learning* must be joined by “...‘generative learning’, learning that enhances our capacity to create” (4%, location 377). This particular remark would seem to correspond to Holacracy practitioners’ use of the method’s processes to continually evolve their organization’s governance records in direct response to creative tensions they sense while doing operational work in their roles.

According to Senge, organizations wanting to become more agile and responsive to change need to be mindful of four basic disciplines with the fifth – *systems thinking* – tying them all together. First, practitioners need to notice how there are *mental models*, or “...deeply ingrained assumptions [...] that influence how we understand the world and how we take actions” (3%, location 254). Mental models are often implicit, cultural artifacts which can require great deal of introspection to unearth and such activity often induces cognitive dissonance that can prove hard for some to deal with. Second, is *team learning*, and seeing how “...teams, not individuals, are the fundamental learning unit in modern organizations” (3%, location 300). The key to maintain this particular practice is to systematically increase the team members’ capacity to acknowledge their mental models, suspend assumptions and start a dialogue. Holacracy practitioners aim to reveal their mental models by surfacing any tensions due to implicit assumptions and then make them explicit by documenting proposed role changes via the dialogue-esque process of integrative governance meetings. Third, working as a team necessitates *building a shared vision* that – unlike many leaders’ individual vision statements that seldom get translated into shared vision – galvanizes the organization’s individuals and fosters “...genuine commitment and enrollment rather than compliance” (3%, location 285). As noted earlier, the roles and surrounding circles of roles making up the structures of Holacracy-run organizations are all purpose-driven which every later-created accountability, domain, next-action, project or policy relates back to. Fourth, *personal mastery*, seems to directly relate to the overarching worldview apparent in the *Integral-Teal* paradigm of depicting the journey as the destination. This practice, Senge explains, is “...the discipline of continually clarifying and deepening our personal vision, of focusing our energies, of developing patience, and of seeing reality objectively” (2%, location 240). To this end, Robertson (2015) argues that by regarding conflicts or tensions not as uncomfortable social situations but as “...among the organization’s greatest resources” (p. 8), Holacracy practitioners seize the opportunity to harness tensions as fuel for systemically driving meaningful adaptive change. Senge (2006) describes a creative tension as follows:

The juxtaposition of vision (what we want) and a clear picture of current reality (where we are relative to what we want) generates what we call “creative tension”: a force to bring them together, caused by the natural tendency of tension to seek resolution. The essence of personal mastery is learning how to generate and sustain creative tension in our lives.

Regarding this particular definition around the personal mastery of creating and sustaining creative tension, there is an interesting correlation to how play theorist Huizinga (1949) describes play itself as being “tense” (p. 10) – where the player strives to “...decide the issue and so end it [and it] is this element of tension and solution that governs all solitary games of skill” (p. 11). This association of how the underlying character of play is to create and resolve tension might be of further guidance when realizing its potential and applicability not only in games but also in surrounding fields of study concerning continual adaptations apparent in *learning organizations*.

The fifth discipline, *systems thinking*, integrates the aforementioned four disciplines and advocates that “...[b]usiness and other human endeavors are [...] systems” (2%, location 228) of cyclical causality where “...every influence is both *cause* and *effect*” (16%, location 1405, emphasis mine). Therefore, seeing how mental models can *both* influence *and* be effected by team learning, shared vision and personal mastery is vital to organizations striving to be *learning organizations*, or *Integral-Teal*. Admittedly, it is much harder to integrate different disciplines as an ensemble than learning each one separately. Offering words of encouragement, Senge explains how such a practice is similar to when one is learning a new language and how difficult it can be at first, but when “...you start to master the basics, it gets easier. [...] It appears that we have latent skills as systems thinkers that are undeveloped, even repressed by formal education in linear thinking” (16%, location 1380).

Senge’s descriptions of systems-thinking prove particularly insightful when realizing potential systemic game-mechanics of cyclical causality derived from Holacracy elements and methods covered in “3. Methodology” section. Before,

however, the fundamental element to be explored further is the Holacracy role, and how *playing a role* in a game and in greater contexts might be viewed as the performance of implicit or explicit descriptions related to that role and its surrounding environments.

2.3 Role-Play

There are a few primary reasons why a role-playing game might aid in introducing fundamentals of Holacracy. First, is the notion of practitioners' continual honoring of the method's processes explicitly documented in an accessible rulebook (i.e., the Holacracy constitution). To offer play-specific parallels to this impression I will explore play-theorist Huizinga's (1949) observations of how clearly documented rules of games create order required within the *magic circle* of play. Caillois (2001 [1961]), another leading play-theorist, provides further detailed classifications of play and games which inform particular design decisions potentially fit for an introductory game context. Second, is Holacracy practitioners' observed approach of stewarding and evolving multiple roles in favor of a single job position. On the topic of roles, two particular sources are drawn on to provide comparative perspectives. Erving Goffman, an influential sociologist, offers interesting observations in *Encounters: Two studies in the sociology of interaction* (1961) concerning how individuals perform a multiplicity of social roles based on diverse contexts. Lastly, Waskul & Lust (2004) echo similar interpretations but specifically within the improvisational play space of *Dungeons & Dragons* where they observe permeable relationships between players and their enacted fantasy roles.

2.3.1 *Classification of Play and Games*

In order to realize a shared lens of the formal characteristics of play, I look to observations provided in the writings of play theorists Huizinga and Caillois. In *Homo Ludens. A Study of the Play-element in Culture* (1949), Huizinga writes

that play is a voluntary “...free activity standing quite consciously outside ‘ordinary’ life as being ‘not serious,’ but at the same time absorbing the player intensely and utterly” (p. 13). On elaborating what he means by ordinary, Huizinga defines this term as real life, for play is “...a stepping out of ‘real’ life into a temporary sphere of activity with a disposition all of its own” (p. 8). Specific spatial and temporal boundaries along with action rules define this temporary sphere, “...the sphere of festival and ritual – the sacred sphere” or the *magic circle* (p. 9). Within it an absolute order reigns for without its rules, there would be no play. In other words, play “...creates order, is order” (p. 10, emphasis in original). Indeed, a common critique of Holacracy from early practitioners is the system’s intricate rules. Many individuals’ familiarity to conventional boss-subordinate relationships can be traced to their years long experiences of parent-child/teacher-student dynamics found in their own upbringing and in many facets thereafter. It is therefore not all that surprising that when introduced to the explicit rules set forth in the Holacracy constitution – most of which are in sharp contrast to traditional authority structures and the consensus-driven workarounds found struggling within such structures – people used to the top-down patriarchal setup are somewhat taken aback.

On how and why the activity of play might help in learning a new organizational method like Holacracy, I believe Huizinga makes a compelling argument for the advocacy and importance of play in a wider cultural context which can also be applied for this particular project. Huizinga argues that culture has in its earliest phases the “...play-character, that it proceeds in the shape and the mood of play [and in] the twin union of play and culture, play is primary (p. 46). Then, the “...play-element gradually recedes into the background, being absorbed for the most part in the sacred sphere. The remainder crystallizes as knowledge” (p. 46). Thus, bringing back to the foreground the play-element can be seen as a method to not only create new understanding but also to highlight and possibly examine previous elements that faded to the backdrop and became hidden assumptions and mental models.

In *Man, Play and Games* (2001 [1961]), Caillois builds on Huizinga's work and adds his own theoretical contributions. He argues that for play to properly function it needs to fulfill the following criteria:

- ✦ *free* (i.e., matching Huizinga's depiction of how play needs to be voluntary)
- ✦ *separate* (i.e., Huizinga's magic circle or sacred sphere)
- ✦ *uncertain* (i.e., results or means to achieve them are not predetermined)
- ✦ *unproductive* (i.e., no goods are produced)
- ✦ *governed by rules* (i.e., during play there is "...for the moment [...] new legislation, which alone counts" (p. 10))
- ✦ *make-believe* (i.e., as compared to ordinary or "real" life)

During the development of the "Little Bookcase Publications" introductory game to Holacracy, the realization of the game's elements and game-mechanics was a continual process of fitting these within Huizinga's and Caillois' criteria of play. For example – and covered in more detail in "3. Methodology" – the design process explored ways to invite people to *voluntary* play a *rule-governed* game via enactment of roles in a *make-believe* organizational context. Then, this attempts to facilitate a *separate* environment where die rolls and drawing cards surface a sense of *uncertainty*. Moreover, Caillois offers an additional framework which allows one to categorize games based on their main features. By locating the design output as a system somewhere within Caillois' classification of games it helps in realizing how might certain elements of the "Little Bookcase Publications" be categorized. According to Caillois (2001 [1961], p. 36), games can be seen as competitive (*agôn*), chance-based (*alea*), simulative (*mimicry*) and vertigo-based (*ilinx*). Incidentally, any game can incorporate elements from more than one of these labels – such as the game of poker which blends skill, luck and bluff all into one. Further explored in "3. Methodology," the introductory game is driven via co-operative play – i.e., where players work together against the challenges put forth by the game itself – so it could be said that the game is therefore *agôn*-based with players competing against the game. However, this seems imprecise and does not tell the whole story. It might

be more accurate to state that the game attempts to fuse multiple distinctions through its game-mechanics with the exclusion of *ilinx*. In other words, as players roll a die (*alea*) in relation to particular action-statistics displayed on their randomly dealt role cards (*mimicry*) they attempt to beat the game (*agôn*) by publishing authors' works and maintaining their overall reputation.

In realizing the varying degree of rules structuring different games, Caillois introduces a spectrum to which games can be situated and realized as "...ways of playing" (p. 53) rather than categories of play. At one end, there is *paidia* – "...an almost indivisible principle, common to diversion, turbulence, free improvisation, and carefree gaiety is dominant" (p. 13) – and at the opposite end is *ludus* – where "...[*paidia*'s] impulsive exuberance is almost entirely absorbed or disciplined by a complementary, and in some respects inverse, tendency to

Figure 5 Caillois classification of games, table derived from *Man, Play and Games* (2001 [1961], p. 36).

	Agôn (Competition)	Alea (Chance)	Mimicry (Simulation)	Ilinx (Vertigo)
Paidia (Open-ended, improv)	Non-regulated wrestling, racing Athletics	Counting out rhymes Heads or tails Betting Roulette	Children's initiations Games of illusion Tag Disguises	Horseback riding Swinging Waltzing Traveling carnivals Skiing Mountain climbing Tightrope walking
Ludus (Rule-based, structured)	Contests (sports in general)	Simple and complex lotteries	Theater Spectacles in general	

its anarchic and capricious nature” (p. 13, emphasis mine). To further illustrate the difference, while a rule-based game of chess would favour *ludus* application, an ad-hoc improvisational child’s play seemingly devoid of rules leans towards *paidia*.

As mentioned earlier, the fundamental unit in a Holacracy-run organization is a role where practitioners favor multiple, evolving roles created by themselves and peers via Holacracy meeting processes. Individuals steward a multiplicity of roles where they enact or *mimic* each of the roles’ purpose, accountabilities and domains archived transparently in the organization’s governance records. While the actual addition, amendment or removal of such descriptions must happen through a highly structured *ludus*-based governance meeting, the individuals’ ideation of proposed roles or changes can be quite creative and *paidia*-esque. Below, Caillois illustrates how the rule/rule-less relationship of *ludus* and *paidia* might not be as polarized as it first seems, and this realization influenced further the development of the introductory game:

(Caillois, 2001 [1961], p. 27)

Rules are inseparable from play as soon as the latter becomes institutionalized. [...] But a basic freedom is central to play in order to stimulate distraction and fantasy. [...] This liberty is its indispensable motive power and is basic to the most complex and carefully organized forms of play..

Another interesting concept is Caillois’ notion of the corruption of games. He argues, “...the principles of play [*agôn*, *alea*, *paidia*, *ilinx*] in effect correspond to powerful instincts” (p. 55, emphasis mine) and if left to themselves can lead to disastrous consequences. The corruption of *agôn* happens when beating the competition is valued even over playing fair, with *alea* you can find its corruption in superstition, and in *ilinx* it is vertigo-inducing overconsumption of alcohol and drugs. Of particular interest for a role-based Holacracy context, the corruption of *mimicry* occurs when an actor – situated either on an actual

theatrical stage or on a more theoretical one stewarding a societal role – “... believes that his role, travesty, or mask is real. He no longer *plays another*. Persuaded that he is the other, he behaves as if he were, forgetting his own self” (p. 49, emphasis in original). In explaining one of his proposed organizational learning disabilities, Senge (2006) illustrates how individuals with singular job descriptions are often at risk fusing their identity with the decision-making role they are enacting (5%, location 449). Might it be that Holacracy’s favoring of individuals energizing a multiplicity of roles and surfacing of mental models can help minimize this risk of *mimicry* corruption?

Lastly, Caillois writes that one “...characteristic of play [...] is that it creates no wealth or goods, thus differing from work or art. At the end of the game, all can and must start over again at the same point” (p. 5). Caillois argues, therefore, that play is “...an occasion of pure waste: waste of time, energy, ingenuity, skill, and often of money” (p. 6). But is all play necessarily wasteful? As a counter argument, the particular aim for “Little Bookcase Publications” is to utilize people’s willingness to learn through emergent play by providing a role-playing board game that introduces and contextualizes fundamental methods and processes of Holacracy. In fact, researcher James Paul Gee (2005) argues that the field of education might benefit from concepts derived from good game design. Not only does he advocate learning-by-doing approaches as being effective ways of knowledge building, but he further reveals correlations between disciplines and rule-based systems of play:

(p. 4, emphasis in original)

A science like biology is not a set of facts. [...] it is a “game” certain types of people “play”. These people engage in characteristic sorts of activities, use characteristic sorts of tools and language, and hold certain values; that is, they play by a certain set of “rules”. They do biology.

Therefore, the introductory game of “Little Bookcase Publications” ultimately aims to on-board new practitioners through role rehearsals using particular game-mechanics related to a particular context. Those who are unfamiliar to

Holacracy but having played the game can then hopefully walk away from the play session's separate *magic circle* with newly produced knowledge of an alternative organizational method that they might themselves apply in their "ordinary" lives.

2.3.2 *Role Performance in Focused Encounters*

As covered earlier, an organization in Holacracy terms is considered as a stand-alone entity with roles as its fundamental unit which individuals choose to steward, maintain and evolve acting as the organization's sensors in its exchange with the outside world. Roles, in a broader social context, are likely something many readers might be familiar with in their daily lives. Speaking for myself, I am simultaneously a student, husband, designer, citizen, brother, son, friend – not to mention other short-term roles I might assume when playing or spectating a sporting event, attending a wedding or a funeral. To offer a more extensive theoretical basis for analyzing and understanding what Robertson (2015, p. 200) calls *role-ationships* in Holacracy-run organizations, influential sociologist Erving Goffman provides perceptive observations of this phenomenon in his paper *Role Distance* – the latter part of *Encounters: Two Studies in the Sociology of Interaction* (1961). Goffman makes a distinction between a role – "...the activity the incumbent would engage in were he to act solely in terms of the normative demands upon someone in his position" (p. 85) – and a role performance – "...the actual conduct of a particular individual while on duty in his position" (p. 85). Echoing earlier statements where many Holacracy practitioners praise how the method's governance records and process can provide clarity on who-is-doing-what, Goffman argues that terms such as *normative demands* can prove insufficient due to "...the amount [of detail] sometimes being tacitly determined unsystematically" (p. 85) often due to the individual's own interpretation of a given role. The parallel to Holacracy is while the former definition is realized as a Holacracy role created in a governance meeting – with its purpose, accountabilities and potential domains documented explicitly in the organization's governance records – the latter is

when an individual actually stewards and enacts a particular role by engaging in whatever was documented. Moreover, as seen in the method's practice where individuals enact and express their roles' explicit purpose through enacting accountabilities, Goffman explains that the fundamental unit in role analysis is:

(Goffman, 1961, p. 86, emphasis mine) *[...] not the individual but the individual enacting his bundle of obligatory activity. The system [...] borrows only a part of the individual, and what he does or is at other times and places is not the first concern. [...] Presumably his contribution and their contribution, differentiated and interdependent, fit together into a single assemblage of activity, this system [...] being the real concern of role analysis.*

In fact, due to individuals being involved in several diverse societal systems often simultaneously, each "...individual will [...] have several selves" (Goffman, 1961, p. 89). This function can often lead to individuals struggling with sustaining such multiplicity of active and dormant roles, resulting in *role conflict*. To avoid unexpected introductions of other roles or actions in a given setting individuals might resort to calendar scheduling and careful selection of relative audiences which can aid in *role-segregation* (Goffman, 1961, p. 91). HolacracyOne's *GlassFrog*, an online web platform primarily created for Holacracy-run organizations to maintain their governance records and Holacracy practice, strives to "...[e]nable and accelerate self-organization through software" (HolacracyOne's *GlassFrog Circle*, n.d.) by providing practitioners online tools to manage their diverse roles in a more systematic and granular approach. Not unlike when Holacracy practitioners embrace tensions and role-conflicts as learning opportunities to be reflected in continual governance records amendments, Goffman (1961) encourages a similar viewpoint when stating that role conflicts are "...not a limitation of role analysis but one of its main values, for we are led to consider mechanisms for avoiding such conflict or dealing with unavoidable conflict" (p. 91).

Referencing the rule-based method of Holacracy and how its practitioners aim to generate further explicit emergent rules surfaced from implicit expectations in role-conflicts, I note interesting parallels to Goffman's (1961) definitions of *unfocused interactions*, *focused encounters* along with *rules of irrelevance*. In focused encounters, "...people effectively agree to sustain for a time a single focus of cognitive and visual attention, as in a conversation, a board game, or a joint task sustained by a close face-to-face circle of contributors" (p. 7). An unfocused interaction, on the other hand, "...consists of those interpersonal communications that result solely by virtue of persons being in one another's presence" (p. 7). While these definitions might be viewed as two extremes on an attention span spectrum, Goffman concedes that more often than not the cognitive separation between an unfocused interaction and focused encounter is permeable, for "...a few externally based matters [...] seep through into the encounter" (p. 30). Thus, not only does a focused encounter exhibit "...sanctioned orderliness arising from obligations fulfilled and expectations realized" (p. 19), but also "...upon rulings as to properties of the situation that should be considered irrelevant, out of frame" (p. 25). When covering these definitions, the various processes and structures of a Holacracy governance meeting spring to mind. In particular, I note similarities of how each meeting round entertains actions and artifacts particular to it which requires the full attention of participants along with an individual stewarding a Facilitator role who declares a process breakdown (i.e., rules of irrelevance) when a "...pattern of behavior [...] conflicts with the rules of [the] Constitution" (HolacracyOne, June 15, 2015).

Incidentally, I observe how the role of Facilitator seems comparable to the one of *game master* inherent in the fantasy role-playing game of *Dungeons & Dragons* v.3.5 (Cook et al., 2003). In their paper, *Role-Playing and Playing Roles: The Person, Player, and Persona* (2004), Waskul and Lust explore the blurring of borders between entities mentioned in the paper's title when one is engaged in the fantasy role-playing game of *Dungeons & Dragons* (D&D). Theoretically, Waskul and Lust rely heavily on the works of Gary Allen Fine

– specifically *Shared Fantasy: Role-Playing Games as Social Worlds* (1983) – and Erving Goffman’s *Frame Analysis* (1974). However, the study is further ethnographically grounded with “...approximately ninety hours of participant observation and forty interviews with thirty role-players” (Waskul and Lust, 2004, p. 333). Waskul and Lust leave room for newcomers and set the stage early on when referring to Mackay’s (2001) definition of fantasy role-playing games ...

(pp. 4 – 5)

[Dungeons & Dragons] is an episodic and participatory story-creation system that includes a set of quantified rules that assist a group of players and a game master in determining how their fictional characters’ spontaneous interactions are resolved. These performed interactions between the players’ and the game master’s characters take place during individual sessions that, together, form episodes or adventures in the lives of the fictional characters. [...] [T]he episodes become part of a single grand story that I call the role-playing game narrative.

The definition above bears similarities to Holacracy and its affiliation of the *Integral-Teal* paradigm. In Holacracy, there are specific *round-based* governance and tactical meetings, both require *participatory* input from attending individuals in *roles* where a Facilitator guides the process using *rules* set and agreed upon by all in the Holacracy constitution. As with the game of *Dungeons & Dragons* and Holacracy, the game master and Facilitator might initially be the most knowledgeable participant in regards to the game’s rules, but “...[a]s a player, each participant must know and understand the rules of the game that function as organizational guidelines for action and interaction” (Waskul and Lust, 2004, p. 337). Indeed, when I attended HolacracyOne’s five-day workshop in November (see *Appendix D.3*) their approach of running role-playing simulations proved to be a perceptive method to understand the counter-intuitive, neutral stance required to guard the meeting process over guarding people’s feelings.

For a fantasy role-playing game to work, Waskul and Lust witnessed in their participant observation and in interviews what Fine (1983) describes as the willingness "...to 'bracket' their 'natural' selves and enact a fantasy self. They must lose themselves to the game" (p. 4). This important ability is echoed in Holacracy-run organizations where people are encouraged to *differentiate role from soul* (Robertson, 2015, p. 42). Practitioners have the autonomy to steward multiple roles all the while reminding themselves that a single role is not a defining, finite description of themselves as individuals. On the topic of role-playing being applied in further contexts, Elisabeth de Kleer's (October 27, 2016) article on inmates joining "...forces against imaginary foes in a cooperative game of Dungeons and Dragons" proves inspirational as it advocates that such role-playing games seem to be "...effective tools for rehabilitating inmates."

Arguably, any linguistics and other intangible cultural inventions can be viewed as artificial products by humans wishing to make sense of the world around them. Thus, Waskul and Lust offer the following proposition: "[s]ince all people necessarily juggle a multiplicity of roles – sometimes shifting from one to the next with remarkable fluidity – are we not all players of *fantasy* role-playing games?" (2004, p. 337, emphasis mine). Tying in Goffman's (1961) argument of how it is "...through roles that tasks in society are allocated and arrangements made to enforce their performance" (p. 87), it can be argued that roles are cultural artifacts with their explicit or implicit expectations granted by systems of contributing factors such as attire, objects, environment and *appropriate* actions documented by repeated practice via tradition. It seems that the practice of Holacracy attempts to utilize these role-multiplicity capabilities by making explicit the often tacit operational and governance knowledge that limits organizations. Clearly, to be willing to bracket oneself in various and explicitly documented transparent roles requires a great deal of self-discipline, confidence and trust that other individuals will do the same. In an interesting association to the focus and frameworks used for this particular thesis paper, Bud Caddell goes on in his critique of Holacracy and argues that asking the already overworked and undertrained employee of existing organizations

wanting to implement Holacracy “...to learn the management equivalent of Dungeons and Dragons on top of their workload is foolish, if not inhumane” (Caddell, January 18, 2016). This adds further arguments that while Holacracy is indeed a complex system not all would agree that it is suitable for complex situations – at least not without proper guidance or tools which incidentally is an area I tend to contribute to with the introductory board game of “Little Bookcase Publications.”

3 Methodology

Having observed how Holacracy practitioners seem to faster understand the method's rules and processes when learning-by-doing as opposed to only reading or theorizing about the practice, I recognized similar limitations early on in my own research. Applying *rapid ethnographic* techniques including a semi-structured interview and non-participant observation, I collected primary qualitative data gathered during my visit to an anonymous Holacracy-run organization. As with many design projects, the realization of "Little Bookcase Publications" as an introductory game to Holacracy fundamentals was not a linear process. Where initial explorations were particularly concerned with the opportunities and limitations of Holacracy as an organizational practice, the literature review and aforementioned primary qualitative data revealed that the method's extensive on-boarding might benefit from additional tools. Thus, the project might have started as a *design-oriented research* but later transitioned to its inverse counterpart *research-oriented design*. Utilizing an online repository wherein the interdisciplinary team of Stein et al. (n.d.) have gathered a series of participatory design techniques that "...help evolve a project lifecycle through participation of multiple stakeholders including potential users or audiences," I highlight key insights and iterations gathered via play-testing throughout the game's development with further details referenced in *Appendix D*.

3.1 Rapid Ethnography – Interview and Non-Participant Observation at a Holacracy-run Organization

After extensive readings during the summer of 2016, I realized that I might need to gather primary data to better understand the practice of Holacracy. Due to Holacracy being an organizational method facilitating integrative decision-making and collaboration of people, the goal was then to carry out primary data collection via fieldwork, or what Tony L. Whitehead (2005) remarks as the “...essential attribute of ethnography” (p. 3). However, there is a particular limitation when doing ethnographic fieldwork, for “...[s]pending long periods of time in the field is considered the crucial aspect of the classical ethnographer’s ability to comprehensively describe components of a cultural system” (Whitehead, 2005, p. 5). In an attempt to address this restraint, I looked to *rapid ethnography*, or what research scientist David R. Millen (2000) describes as “...a collection of field methods intended to provide a reasonable understanding of users and their activities given significant time pressures and limited time in the field” (p. 280). Furthermore, Rea-Holloway et al. (2006) explain how rapid ethnography – sometimes labeled as *short-term ethnography* – “...has been characterized as relying on ethnographic techniques, with the distinct possibility of missing some of the fundamentals of deep ethnographic research.”

Stressing further the importance of including ethnographic research in the field of design, Millen (2000) illustrates how it can provide “...a richer understanding of the work settings and ‘context’ of use for the artifacts [to be designed]” (p. 280). With this in mind, I visited a Holacracy-run organization to run a one-hour interview with an active practitioner on their experience with Holacracy (see *Appendix B*) and observe a 30-minute tactical meeting with a number of other practitioners (see *Appendix C*). In the following section, I will cover some key highlights from my observations and for the sake of maintaining anonymity

– and adhering to an approved Research Ethics Board proposal (see *Appendix G*) – I will refer to the organization I visited as *Company A* and my main interviewee as *Practitioner A*.

On my arrival, *Practitioner A* welcomed me to *Company A* by leading me to a small meeting room which walls were plastered with various visual management artifacts such as client contract timelines, checklists, projects' statuses with practitioners' profile pictures attached to each. The same environment would serve the following tactical meeting as these data points were referenced at one time or another throughout that specific process. This setup corresponds to Robertson's (2015) emphasis on how the creation of a "...shared space where current projects, checklists, and relevant metrics can be easily displayed and reviewed" (p. 96) is vital to effective Holacracy operations. Indeed, one of the key conclusions of Jordan's and Lambert's (2009) study revealed how "...making new knowledge available to people in the company who can use it should be a high priority" (p. 10/35). Later in November, I would recall how such a transparent layout of information parallels similar necessities required by default in co-operative board games. Moreover, as such games can arguably be viewed as ongoing tactical meetings where all necessary information is within reach, the game's development would later drop tactical meetings as they were rendered redundant with this particular viewpoint in mind.

There appear to be similarities between multiple reciprocal relationships observed in earlier chapters concerning complex contexts as systems, and Wasson's (2000) description of *activity systems* – "...the interrelationships among learners, teachers, objects, and any other relevant aspects of the environment" (p. 381). While observing experienced practitioners partaking in the 30-minute tactical meeting was indeed a thrilling experience, I must admit that I had trouble keeping up with their pace due to my initial lack of knowledge concerning both the specific meeting process and their in-house operational data. Wasson (2000) observes how an ethnographer needs to "...emphasize microlevel examination of interactions [and] the roles played by

artifacts and the environment in which an engagement takes place” (Wasson, 2000, p. 381). To achieve such observational detail proved difficult due to my limited knowledge of the practice at that time. Nonetheless, it was encouraging to see that with continued practice – as with most disciplines – novel practitioners can become skilled in the process granted they are given time and helpful tools.

During the interview, the interviewee explained how their 16-person digital agency had practiced Holacracy since adopting the method in 2013. The interviewee – having researched numerous post-industrial management methods for scaling their organization – attended a Holacracy Taster Workshop and pitched for its adoption at the organization. The interviewee explains that prior to implementing Holacracy, the organization was already practicing Agile principles where they realized the necessity of having transparent and accessible data when it came to enabling autonomous staff members. Apparently, that this culture was in place beforehand helped the adoption of Holacracy immensely. Since the signing of the Holacracy constitution in 2013, one of the major improvements for the organization has been the increase in organizational clarity provided by the method’s pathways and governance records which makes explicit the numerous implicit expectations that might surface from day-to-day operational work. When individuals have learned to trust this new system, and become disciplined in sensing tensions and processing them instead of waiting for someone else to fix their problems, the political power struggle and dependence on relationships is lessened for such approaches are rendered near meaningless in a transparent, rule-based Holacracy context. In covering what have been some tough challenges when practicing Holacracy, the interviewee reveals that the unlearning of parent-child dynamics can be a common obstacle. Furthermore, as the current Holacracy constitution does not cover hiring/firing and compensation, it has been a bit of challenge figuring out ways to deal with such issues. Although, they believe things seem to be progressing in such a way that relative teams closest to certain operations are now handling interviews instead

of individuals filling roles that might not have the most accurate picture of what is needed of new recruits. *Practitioner A* remarks that while Holacracy has been transformative for the organization up until this point it is unnecessary to define everything in their day to day activities in Holacracy terms. If something just works, it works. The final question of the interview concerned where the interviewee could see their organization in the next five years. The interviewee remarks how difficult it is to answer such a question when dealing with today's rapidly changing environments and when operating within a system that encourages you to change direction often and incrementally based on surfaced data. The organization's preferred approach is to base themselves in reality at certain intervals and steer dynamically towards or away from this or any other previously made projection. *Practitioner A* reminds me that Holacracy is developed from methods such as Agile software development so it is inherently not a waterfall, predict-and-control strategy system.

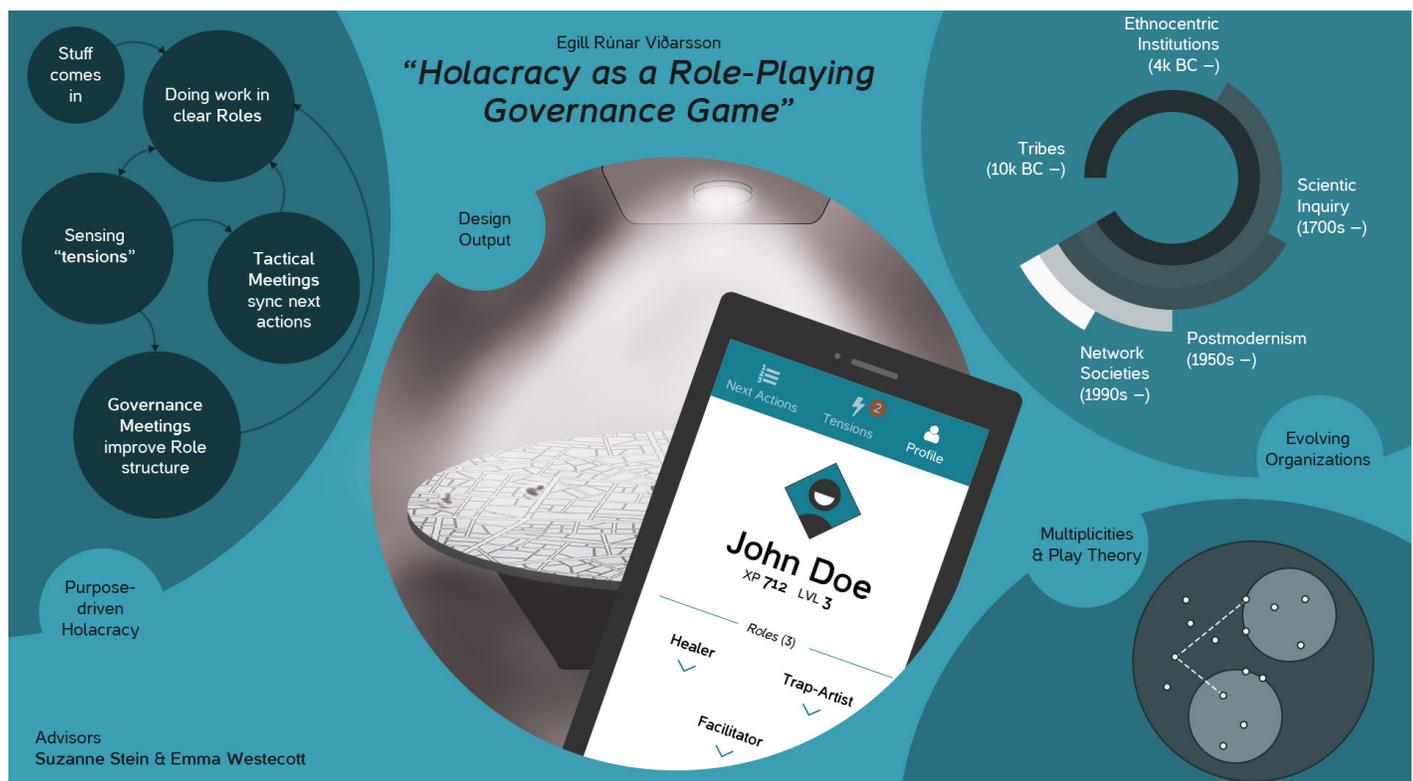
3.2 Research-oriented Design

The initial focus of the thesis project was to explore opportunities and limitations of Holacracy as an organizational system. Starting with what might have been *design-oriented research* (i.e. producing research via design) later shifted to *research-oriented design* (i.e., producing design via research). In his paper, "Why Research-oriented Design Isn't Design-oriented Research" (2009), Daniel Fallman recognizes these methods' close relationship but to avoid too broad a definition where "...[e]verything becomes design and everything becomes research too" (p. 195) he advocates that it is essential to continue regarding them as separate variables. This suggestion would prove particularly helpful in later stages of the project when re-realizing how the focus of the research shifted following the literature review, fieldwork and initial experiments.

3.2.1 Initial Explorations

During my initial explorations for the game in August 2016, I found that developing a participatory exercise mainly from literary data to experiment with non-practitioners' understanding of the method was limiting due to my own lack of hands-on Holacracy knowledge at that time (see *Appendix D.1*). An initial exercise revealed how difficult it can be for non-practitioners to comprehend and trust a new, different system by only reading a rulebook or a manual. At the *Digital Futures* program's colloquium in late September, I illustrated the collaborative peer-to-peer method of Holacracy and how it relates to similar *Integral-Teal* approaches evident in organizational development theory. Seeing similarities between these notions and the ones evident in many co-operative board games – where "...[p]layers work together toward a common goal [and] all players win or lose together" (Boardgamegeek, n.d.) – I proposed that I might potentially realize the design output as a multi-user web platform that introduces Holacracy through a co-operative, role-playing game experience (see *Appendix D.2*). However, as I scoped the concept and reframed the

Figure 6 OCAD University colloquium poster from September 28, 2016.



potential target users from being temporary exhibition visitors to individuals in organizations contemplating the implementation of more *Integral-Teal* concepts, I moved into other directions.

Seeing how the practice of Holacracy advocates role-filling individuals to collaborate via its processes towards a common purpose, I looked for similar notions evident in co-operative board games. On the topic of winning and losing, the Boardgamegeek wiki notes "...[e]ither the players win the game by reaching a pre-determined objective, or all players lose the game, often by not reaching the objective before a certain event happens" (Boardgamegeek, n.d.). A further justification for applying a co-operative method is a referral to DeCoster's et al. (2012) conclusions that suggest "...cooperative play in video games – whether violent or not – has the potential to improve cooperation in different circumstances" (p. 279). On a grander scale, Huizinga (1949) observed how "...[s]olitary play is productive of culture only in a limited degree" (p. 47). With this in mind, there often is the presence of a linear process tracker which constrains the potential lengthy periods of time sometimes needed for co-operative play-sessions. Such a device tends to help guide players' individual and collaborative decisions throughout the game. To then add richer complexity to the required decision-making, these games often break down further into contextualized sessions, missions or objectives with specific set-up instructions and goals. Depending on the various nature of these criteria each session can take anywhere between 30 minutes, three hours or even days. Likewise, as Holacracy can be seen as a method to continually help organizations striving to be *learning organizations*, an introductory board game needs similar ludic temporal limits to condense playing sessions into digestible periods. Among sources of inspiration – that all share the utility of emergent play, active role-playing and multiple play-sessions in one way or another – are *Pandemic: Legacy* (Leacock and Daviau, 2015), *Zombicide* (Guiton, R. et al., 2014) and Blast Theory's et al. *Day of the Figurines* (2006) along with aforementioned *Dungeons & Dragons* v.3.5. As an example of co-operative play seen in *Pandemic: Legacy*, players battle outbreaks of diseases by choosing and combining a limited set

of actions granted from a larger pool of options. This game-mechanism is sometimes called *worker-placement* which “...requires players to draft individual actions from a set that is available to all players” (Boardgamegeek Wiki, January 13, 2017). When all players have taken their turns they reveal cards from decks and spread disease tokens on account of the game itself. Likewise, in *Zombicide* players collaborate in ridding a post-apocalyptic world of hordes of zombies. When all players have used up their allocated actions they not only reveal specific cards to see how many zombie tokens are spawned to the game’s board space but they also make moves for the zombies on account of the game itself.

Having played both games with great pleasure, I observe how it seems a necessity for co-operative games to realize an external *other* that players can work together against. I prefer *Pandemic’s* more abstract approach as compared to the one of *Zombicide* or *Dungeons & Dragons* which methods, arguably, are inherently racist towards specific races that are often deemed hastily as monstrous. Having analyzed the game-mechanics and artifacts of these existing games, I initially attempted to frame these within Holacracy roles and circles structures. While effective in learning more about the necessary processes and approaches of Holacracy, this approach and potential further iterations thereof felt forced. Moreover, I theorized that in an organizational Holacracy context, the *other* might simply be day-to-day operational obstacles and events practitioners might face in realizing their own and collective purpose. Thus, drawing on previous knowledge from working with clients at an advertising agency I envisioned the context of a simple print publication firm where players would publish authors’ works by filling multiple roles such as Editor, Proofreader, Designer, Promotion and Finance – along with the Holacracy roles of Facilitator and Secretary – while revealing potential event cards on the account of the game which depicts any obstacles thrown the players’ way.

3.2.2 Key Iterations Evident in “Little Bookcase Publications”

Version History

v.1.0 In October, particular specifics regarding game-mechanics of how players collectively win or lose and how to work with each other to publish authors’ works were still vague. Having found a post titled “Gamifying Glassfrog” (Wong, August 28, 2015) on the *Holacracy Community of Practice* forum I joined the conversation and shared my process and concepts until that point. During a discussion with Alexia Bowers – one of Holacracy’s longtime developers – she mentioned HolacracyOne’s Holacracy Practitioner Training workshops. She explained how they run simulations and role-playing elicitation using a fictional context where operational “..‘work’ of sorts” (Bowers, October 9, 2016) is worked in to surface tensions that are then processed via simulative meeting processes. This conversation led Brian Robertson to reach out and ask if I was interested in attending such a workshop in San Francisco in November the following month. This was a great opportunity to gather more primary qualitative data and feedback on the game’s current development so I decided to attend.

Due to how soon the workshop was being run, for the game’s initial v.1.0 (see *Appendix D.2*) I left out any specific operational game mechanics as of how to collectively win or lose. Instead, I focused on grounding potential elements using the context of a fictional publication firm running on Holacracy. Filling the roles of Editor, Proofreader, Designer, Promotion and Finance – along with Holacracy Facilitator and Secretary roles – the game would potentially be played by four individuals stewarding two roles each. I created relatively empty role descriptions gathered in a governance folder along with a Facilitator’s guide and information papers reminiscent of *Dungeons & Dragons’* character sheets. For the latter I had envisioned potential incorporations of whatever operational work would later drive the game (e.g., projects, next-actions, checklists, level-up functions for role-development). Referring to Robertson’s (2015) claims that “...a leading cause of failed Holacracy implementations is simply not scheduling or holding the key required meetings” (p. 157) I realized a sense of time was

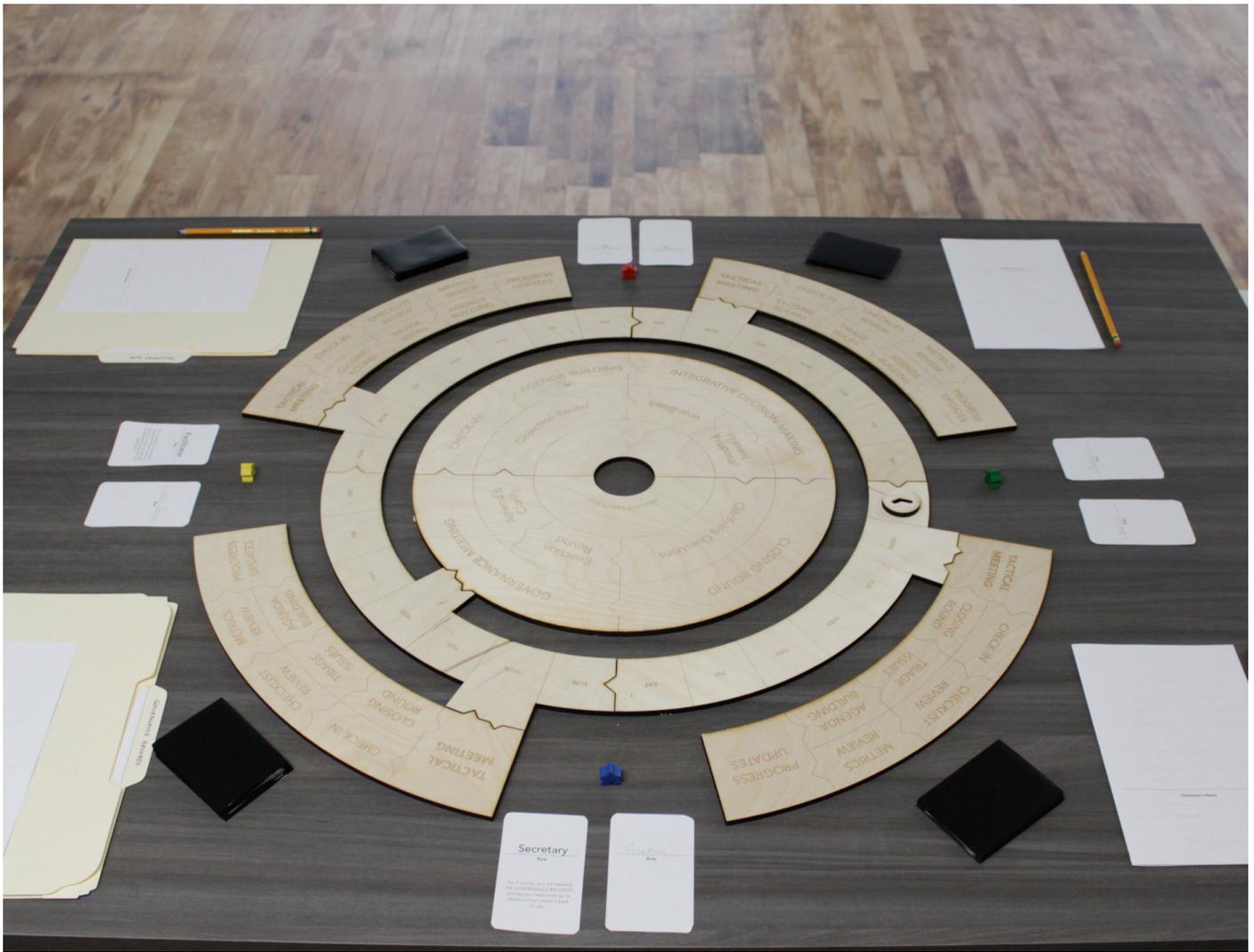


Figure 7 An overview of the v.1.0 of Holacracy role-playing game setup.

needed to visualize not only this scheduling requirement but also the meeting processes themselves. The initial board designs were realized as four seven-day weeks with one tactical meeting board attached to each Monday and a single governance meeting attached to one of the Wednesdays. Lastly, to imbue the game with some potential autonomy against which players could collaborate, I included ideas for a few event cards which were to be revealed at the start of each day and would affect gameplay and possibly operational work in one way or another (e.g., “Power Outage – The power is out and you need to make due with non-electrical equipment for two days”).

v.1.5 In November I attended HolacracyOne’s Holacracy Practitioner Training bringing along the v.1.0 of the game. The intensive five-day workshop provided extensive hands-on knowledge of the method’s processes along with participants’

feedback on the game's then-current development. In grounding the game and making it less *paidia*-esque – or open-ended – the insights gathered at the workshop would form the initial *ludic*-structured game mechanics first appearing in v.1.5 (see *Appendix D.3*). These early designs included ideas for artifacts such as cards, resources and tokens that had interdependent cyclical relationships to one another to mimic the complex context in which Holacracy seems to work well as an organizational tool. Specifically, the workshop in San Francisco explored how operational projects are defined within Holacracy as series of next-actions (e.g., “Cleaned out garage” is a project which might include concrete next-actions such as “Sort recyclable materials” and “Look up the nearest recycling center”). I observed parallels of this to one of the core game-mechanics in another board game called *7 Wonders Duel* where players develop landmark cards by deploying specific smaller resource cards (Bauza and Cathala, 2015). Thus, I developed project cards in a similar manner which completion would require particular next-action cards of “meet with author,” “read,” “fix,” “purchase” and “produce.” The next-actions would need to be generic enough to work across various projects while still relate to the game's roles. Taking further cues from board games that primarily operate from similar worker placement mechanics, each player's turn is made up of three moves to enact these next-actions. To add to the game an *alea*-based “...will it come off?” sense of uncertainty (Huizinga, 1949, p. 47), I took a cue from *Zombicide* and *Dungeons & Dragons* where players would need to roll a die for next-actions to check for their success or failure for relevant projects.

I recalled HolacracyOne's workshop role-playing simulations where there was a finite amount of currency included to act as gameplay resources, as well as potentially surface role-conflicts to process via the governance meetings. Taking a cue from this implementation, I added money cards which were to link to “purchase” next-actions of specific project cards. When signing on author cards these grant players with initial funds where each author requires a minimum of six completed projects to have their work published within a certain period of days. The survivors' experience-point (XP) tracking system in *Zombicide* was

applied to updated role cards to potentially add further *agôn*-specific mechanics as co-operative play “...sometimes coexists in tension with competitive scoring” (Boardgamegeek (n.d.)). This would later be abandoned, but the aim was for role-specific skills to become available when certain levels of experience points were collected by the players. The skills derived from rolling high numbers on next-action cards and successfully completing projects would then hopefully hint at potential proposals for the players to create during the game’s governance meetings.

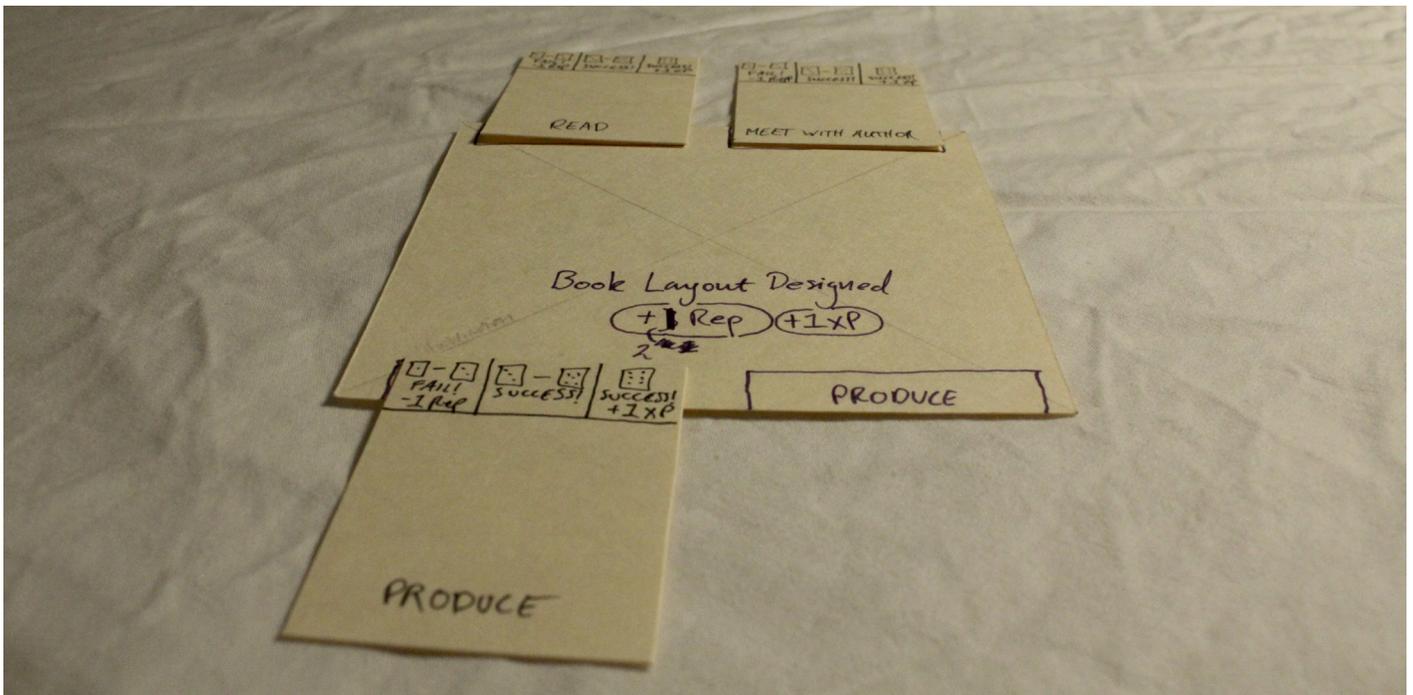


Figure 8 v.1.5 project card and related next-action cards marked as completed by placement.

Due to the lack of game-mechanics addressing a win and lose states, I analyzed how such notions are addressed in co-operative board games like *Pandemic: Legacy*, *Zombicide* and *Dead of Winter* (Gilmour and Vega, 2014). Inspired by these design decisions, I introduced a reputation tracker for the publication company. The reputation tracker is affected positively by players completing projects and publishing authors, and then negatively by failed next-action attempts and missed author deadlines. Depending on the tracker’s position it might make die rolls easier or harder, and add or take away additional authors. Were the tracker to move past the reputation markers in the negative zone the game would be immediately lost as the publication company’s reputation

had suffered beyond repair. The same would be true if the organization went bankrupt or if players lost all authors. Were things reversed, however, and the tracker had no more space to move in the positive direction, then the game would immediately be won. Wanting to condense the play session of the game – and remembering that co-operative games often break down their potential game sessions into particular missions or objectives – I included in the game’s rulebook a list of potential objectives or *strategies* that players would choose from (e.g., a tutorial strategy might be “Publish one Author within their deadline”).

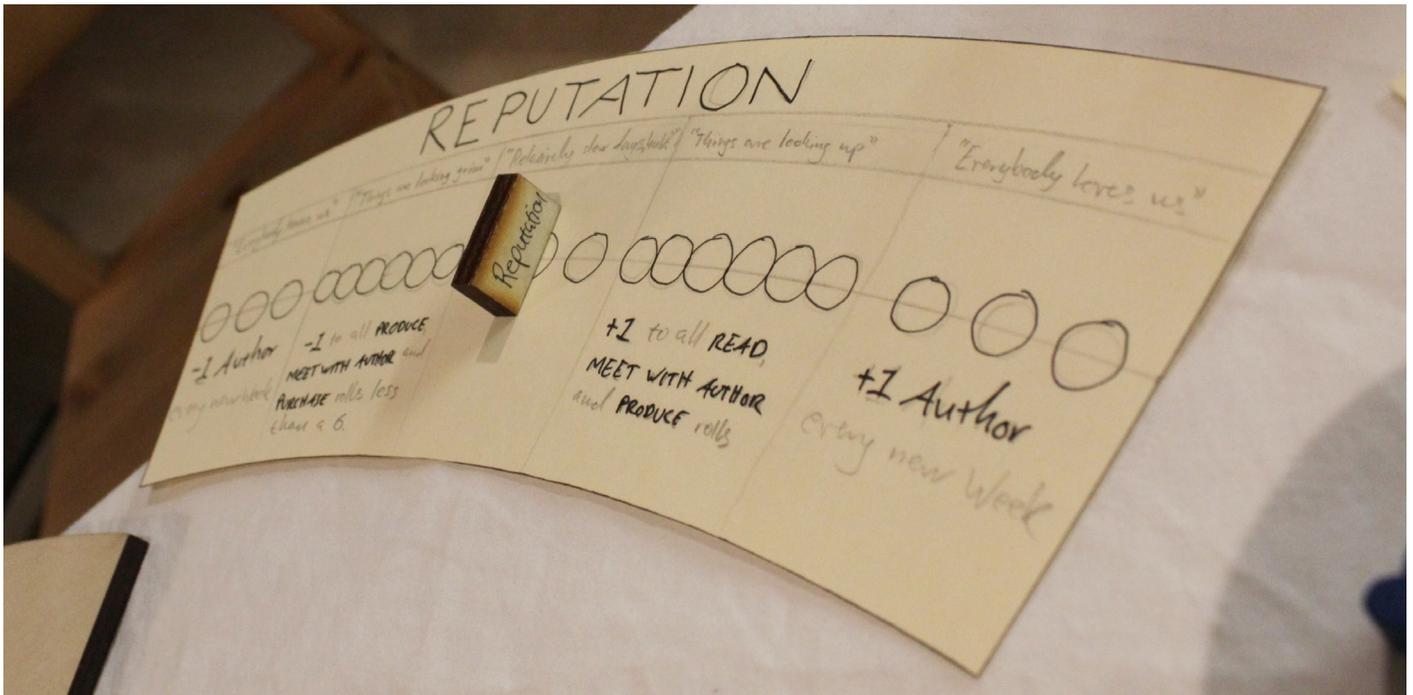


Figure 9 Early reputation tracker in v.1.5.

Lastly, I updated the event cards to have a few of them penalizing less or not at all if players’ roles had explicit accountabilities set in the governance records created via the monthly governance meeting. This was to enforce players to see that with Holacracy processes they have added leverage to change the governance records in response to events that come up. In turn, this then increases the organization’s capacity of dealing with such things were they to happen again. All of these elements were starting to weave together *ludic*-based game mechanics forming a system of reciprocal relationships where every element has a potential to be both an influence and a result.

v.2.0 Having play-tested version 1.5 by playing it with myself at one point – and then with my partner at another – small iterations were then reworked for v.2.0 (see *Appendix D.4*). I recognized the potential risk of including such insights as they might be affected by previously held relationships and thus it was important to have outsiders try these changes in a subsequent version. To this end, Brian Robertson and Alexia Bowers of HolacracyOne agreed late December to play-test and review the latest version of the game coming January. This was a great opportunity to have experienced Holacracy practitioners validate certain exclusions and inclusions of the method’s elements fit for an introductory game. This particular iteration included double-sided boards in order to maximize the available space with the addition of a Holacracy Lead Link role (see *Appendix A*). On one side of the boards were the particular tactical and governance meeting processes while on the other was an operational overview of the organization’s authors, their projects and the organization’s finances. I sourced random gender-ambiguous names for the author cards using a website called BehindTheName.com (Campbell, 1996). When players would sign on new authors they would have a chance to name the author’s potential work. This feature seems to work well and engaging in *Pandemic: Legacy* where players get to name the diseases they eradicate. Lastly, financial currencies were realized as euros (€) as I was hesitant and bias against using the too-familiar dollar (\$).

I sent Robertson and Bowers a copy of a paper-based execution of the v.2.0 game with laser cut tokens and a rulebook on January 19, 2017. I designed and illustrated temporary placeholders for the cards’ designs as to form initial sense of consistency around the overall design. My colleague Sara Gazzaz’s designs of next-action cards and proposed color palette would later influence the trajectory of the art design as well as the fictional company’s branding. Since I could not be present for this particular play-testing session, my specific concerns at that time was to evaluate whether unknowing players could figure out the game mechanics and context leaning only on its rulebook for guidance.

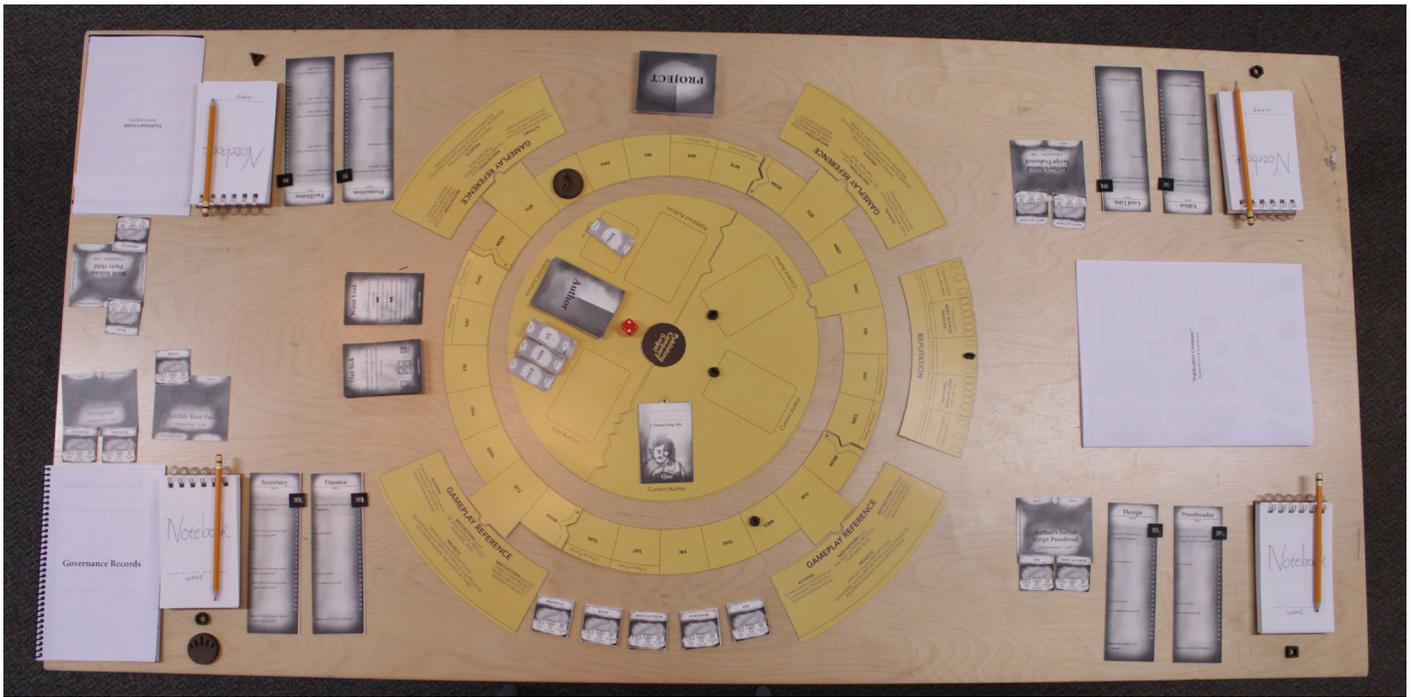


Figure 10 v.2.0 setup that was sent to HolacracyOne partners on January 19, 2017, to play-test and review.

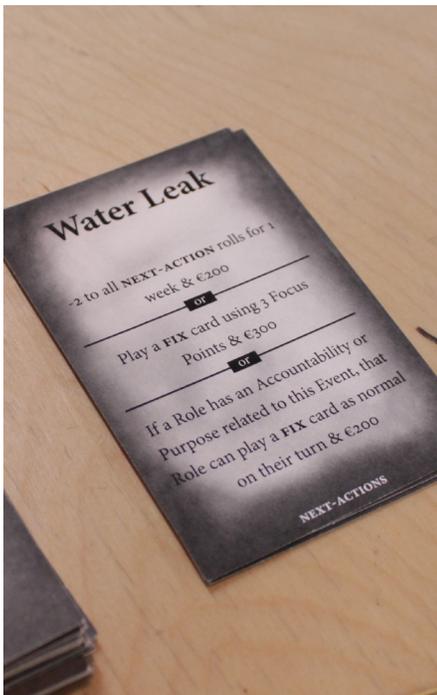


Figure 11 Close-up of a multi-option event card.



Figure 12 Close-up of v.2.0 operations side of center board with author cards, funds, time token and an authors' deadline token.

v.2.5 Receiving back Robertson's and Bower's feedback a few weeks later, their primary observations were that I needed to greatly simplify the mechanics as a number of the contextualized terminologies tended to add further cognitive difficulties to an already complicated learning process of Holacracy. Moreover, the double-sided board feature did not help in this matter. They further suggested I remove the role of Lead Link due to the small scale of the fictional organization and focus instead on Holacracy roles, accountabilities and governance meeting. Bowers further offered that it was very engaging and rewarding to roll for next-actions on projects in order to raise the reputation status of the publication company. I admit that their large number of suggestions for cutting out carefully planned mechanics was a bit of a blow for my self esteem but it was also a maturing point to regard such outside feedback as valuable integrations for further iterations. It also confirmed for me the Agile principles of favoring small, frequent iterations over working for extensive amounts of time on a master version usually from one's own assumptions.

In February, I gathered many of Robertson's and Bowers' suggestions to realize a v.2.5 of the game (see *Appendix D.5*). This version I then play-tested with three members from my cohort while participating myself filling the roles of Facilitator and Secretary. It was an interesting challenge to act as a player in the game while simultaneously being aware of potential over-attachment as the game's developer. At this point, I gave the hitherto nameless publication company the identity of "Little Bookcase Publications" and further created a few logo ideas tying in Gazzaz's color palette. These combined efforts started to give the game's context a more tangible form.

The default time required to play the game was aimed for one hour, and to this end many of the previous version's elements were either eliminated or shortened. For example, as a co-operative board game with all related data being within reach at all times the fallback necessity of tactical meetings was made redundant and main focus was given to the governance meeting happening twice during the game's default timespan of one week. The approximately one-hour long play-testing session revealed several important notions. First of all,



Figure 13 Overview of play-testing setup for v.2.5 in February, 2017.

figuring out a comprehensive order for the explanation of the game mechanics is important as their complex interdependent relationships can be quite confusing. Moreover, having a critical cohort as play-testers – who might spend more time analyzing various elements and possible issues than actually playing – tended to lengthen the assumed time I had suggested for play. Since I was stewarding the role of Facilitator and Secretary in order to save time – particularly during the governance meetings – it became apparent that a player who is randomly dealt these governance-based roles cannot work on operational projects. Likewise, as the game needs to be developed further as a stand-alone game a relatively simple rulebook and a few accompanying demonstration videos showcasing core game mechanics and governance meeting process would help for a subsequent version. While extracting the roles' accountabilities and placing them on the back of the relative role card, the double-sided feature limiting the previous version resurfaced. I recalled Robertson's suggestions that perhaps roles might have separate, predetermined accountability cards assigned to them via governance meeting which would lessen the open-endedness of the current version. Moreover, I thought this might concretely emphasize the underlying relationships of events, projects, roles and their relative accountabilities without players having to resort to writing and documenting observations themselves.

I suggested this idea to the present group and they saw good potential that such an iteration might better gamify the governance meeting and tie it to the operational side of the game.

During the single governance meeting we ran – for which I had devised a set timer of 10 minutes – I facilitated the process where players suggested changes to their own or others roles’ accountabilities. The process went relatively smoothly which might have confirmed previous observations of how helpful it can be to have an experienced Facilitator. After having played through a few additional game-days, players responded that they had gotten the hang of the game mechanics and that the same might also be true if we had run another governance meeting. To be fair, as there was only a single play-testing session of v.2.5 it might be premature to state such notions. Likewise, it is too early to

Figure 14 Next-action cubes in v.2.5, painted by Sara Gazzaz, along with updated project card’s temporary wireframe design.



tell whether the game-mechanics are balanced enough to allow for engaging play. Nonetheless, repeated play with the applied mechanics seems therefore to correspond to how Holacracy practitioners need continued involvement with the method and its processes in order to start trusting it and become confident in its ways. Of course, to validate such claims there needs to be further and repeated play-testing with a subsequent versions of the game. Lastly, while

Figure 15 A player's meeting pawn, the rotating "Starts-the-Day" token along with two roles and their next-action capabilities.



Figure 16 Same as earlier figure, but with flipped role cards showing their initial accountabilities on their backside.



admittedly helpful for a 60-minute play-testing session – especially during the governance meetings – the fact that I stewarded the governance-based Facilitator and Secretary roles highlighted potential limitations of the game since it still might need a knowledgeable player to guide the process as opposed to novel players relying solely on a rulebook for guidance.

Taking a note of these observations, I decided to create a four-minute subtitled motion-graphic video (see *Appendix F*) that would showcase core game-mechanics for visitors and prospective players of the subsequent v.3.0 game displayed at the *Digital Futures* graduation exhibition in April 2017. During the exhibition, a condensed rulebook (see *Appendix E*) was also offered as guidance along with a sign-up sheet where visitors could sign up to play for predetermined periods of time. Before the exhibition, I contemplated that I would likely need to emphasize to newcomers that the game attempts to introduce Holacracy fundamentals via contextualized gameplay and repeated play seems to aid in this endeavour. Thus, for people who might not be able to play a full 45-minute tutorial I would implement a 15-minute teaser game session of sorts that can potentially explain the core ideas behind the game. To be absolutely sure, I decided I would have to be within reach of the game's setup for the entirety of the exhibition.

In the next section I will offer an overview of v.3.0 of “Little Bookcase Publications,” insights and observations gathered from visitors trying out the game during the *Digital Futures* graduate exhibition, as well as other understandings that surfaced via the previously covered methodologies. Similar to how difficult it can be to explain the systemic nature of Holacracy via linear writing, it is worth noting that similar limitations are likely to surface when attempting to illustrate the cyclical interrelationships inherent in v.3.0's game-mechanics in the following pages. Thus, it might be helpful at times to refer to the rulebook in *Appendix E* as well as the four-minute overview video in *Appendix F*.



Figure 18 v.3.0 setup, completed with an enclosed rulebook and laminated “Secretary Notes” to capture data in governance meetings.

game’s primary board layout forms an interlocking cyclical shape to highlight the interconnected relationship of the game’s governance mechanics (e.g., role and accountability cards) and operations (e.g., authors, projects, next-actions, events, funds).

To give an overview of the interrelationships inherent in this version’s game-mechanics, I will demonstrate a few interactions where four fictional players are playing according to the following 45-minute tutorial objective: “Starting on a Monday with neutral Reputation, publish 1 Author who requires 4 completed projects within 7 days.” To set things up for this session at “Little Bookcase Publications,” the players of Bob, Aki, Fiona and Carrie randomly deal themselves two role cards along with one project. For each role card there follows an initial accountability card which is specified in the rulebook (e.g., a “Design” role card always starts with a “Preparing and sending our Authors’ book designs to print” accountability card). Referring to the objective card for this session, the players place the time-token on Monday, reset the reputation

tracker and reveal author cards until they find one that matches the one stated on the objective card. The players decide to name the particular author's work "The Fleeting Butterfly" by writing the title on the author card. The author is then placed on the first author space shown on the operational side of the two boards with the relative author token placed on a day corresponding to the author's deadline ranging from the current Monday.

Figure 19 v.3.0 author card, with two project cards placed underneath marked as completed.



Figure 20 A player's setup: project card of "Author's Script Proofread," two role cards with an initial accountability card each and a meeting pawn.

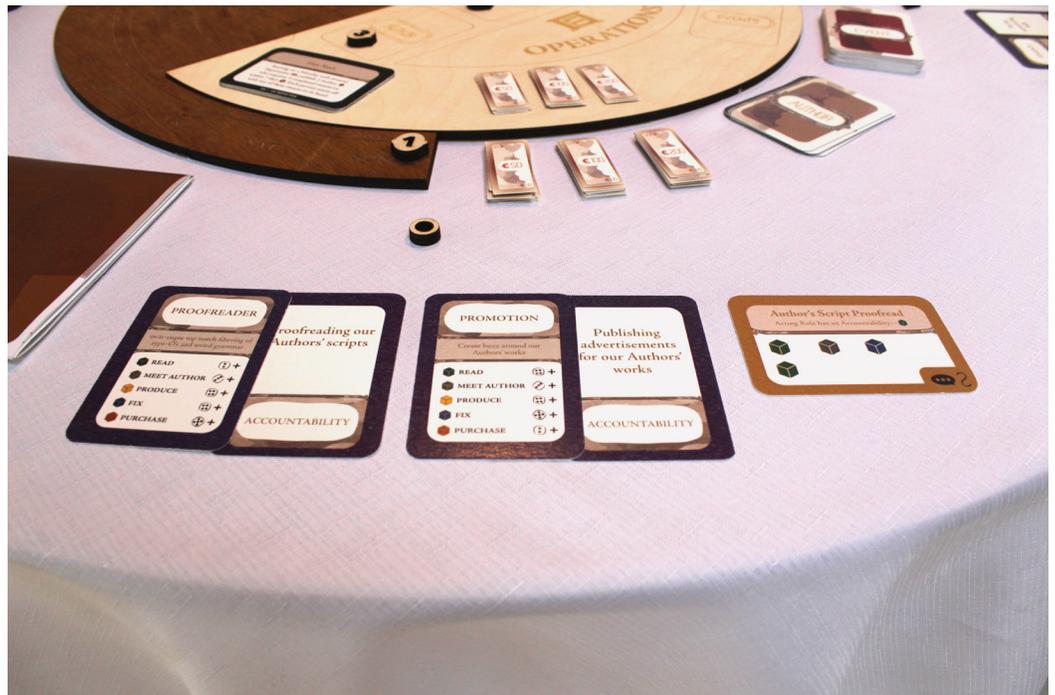


Figure 21 Close-up of v.3.o's time tracker and token. Each day of the time tracker depicts what game-mechanics take place and in what order.



Figure 22 Close-up of v.3.o's reputation tracker and token.



Figure 23 Close-up of one of v.3.o's multi-option event cards.



With this initial setup done, the players observe on the author card what four projects need to be completed to publish “The Fleeing Butterfly.” They check with each other whether any of these projects happened to be dealt out during the game’s setup, and sure enough, Aki got “Author’s Script Proofread” and Bob got “Book Printed & Bound.” Aki notices that his project card states that if the acting role has a related accountability card then that particular requires less next-actions to be successfully rolled for. Aki exclaims that one of his two roles – the “Proofreader” – has indeed an accountability card which states “Proofreading our Authors’ works.” Because of this, Aki suggests to the other players that he start the game by using the first turn of Monday. The others agree, Aki gets the “Starts-the-Day” token and reveals Monday’s event card and enacts his three moves for the day. For further details concerning players’ turn game-mechanics, please refer to the v.3.0’s rulebook in *Appendix E* and overview video in *Appendix F*.

As players hopefully start to recognize while playing the game that accountability cards make certain interactions with projects and events easier to deal with, they are likely to wish for additional accountabilities. On Tuesdays and Thursdays, players first run a governance meeting before revealing event cards and enacting their turns. The individual filling the role of Facilitator uses the game’s rulebook to guide the players through the meeting. During the “Agenda Building” round, each player draws an additional accountability card which then leads to the “Integrative Decision-Making” round wherein players take turns by creating proposals for their drawn accountability cards concerning which of the existing roles these should be attached to. While each player makes their proposals, the others use their meeting pawns to traverse through the surrounding sub-rounds in enacting the governance meeting’s integrative process. As there is a limit of four accountability cards per role, the aim is not for players to compete amongst themselves in collecting accountability cards but to refer to the existing roles and their relative accountabilities and create a dialogue where it makes sense to clarify additional functions.

It is worth noting again the inherent limitations of explaining in linear writing the reciprocal relationships in a game system. As mentioned above, it is my hope that the combined efforts of this text, the included rulebook and overview video in the appendices might aid in minimizing this constraint.

4.2 Holacracy as a Peer-to-Peer Organizational Method

As a governance and management system, it would seem that Holacracy might not be a suitable practice for everybody. Individuals who are used to having control of subordinates – either as a commander-in-chief or as an empowering leader – are likely to face difficulties within a system which distributes authority and decision-making in the peer-to-peer manner of Holacracy. Likewise, individuals who want to rely on solutions, time management and directives coming from a leader as opposed to individually organizing their own operations and decisions are expected to face similar challenges in early adoptions. Depending on the size of implementing organizations and their acceptance of peer-to-peer approaches, Holacracy – with its rules and explicit processes clearly differentiated from more conventional management methods – promises a steep learning curve for early practitioners. The method has some criticizing it as being overly complex and bureaucratic – “...to learn the management equivalent of Dungeons and Dragons on top of their workload is foolish, if not inhumane” (Caddell, January 18, 2016) – while others embrace the explicit rules, the multiplicity of roles and how their combined efforts allow for operational clarity and emergence of additional rules created by practitioners themselves. Not unlike a person learning a new discipline or a sport, individuals wanting to implement Holacracy at their organization can expect up-front costs such as time and energy due to their inexperience and initial clumsiness with Holacracy. For a novice baseball player who might be having a hard time hitting balls it is quite understandable that they would curse the bat, the sun hitting their eyes or anything else for their own initial lack of experience. For them to

want to keep practicing despite hiccups and awkward mistakes, they require continued motivation and perseverance through coaching along with further on-boarding resources.

It is relatively unclear how the size of organizations affects implementations, although it appears that with a greater number of individuals there is potential for greater resistance to such an unfamiliar organizational method. Thus, practitioners should not expect that Holacracy will “...get rid of your problems; Holacracy is a tool that allows you to solve your own problems” (Robertson, 2015, p. 194). To accept this expectation of Holacracy means developing courage to face role conflicts not as uncomfortable situations to avoid or dismiss but as resourceful, grounded tensions that can be processed to help individuals better steward their roles in expressing and evolving the overarching purpose of the organization.

4.3 Holacracy Fundamentals Applied in a Role-Playing Board Game

Regarding the thesis’ research question – *how might [Holacracy and its] fundamental rules and methods be extracted as a role-playing game structure for learning and on-boarding* – the v.2.5 of “Little Bookcase Publications” seemed to provide insightful learning opportunities for non-practitioners provided the game does not include too many elements and rules from Holacracy to serve as an introductory format. This was further ensured via play-testing where participants offered insights that fueled subsequent iterations emerging in v.3.0. As there was only one play-testing session conducted with v.2.0, and one with v.2.5, it might be too soon to tell whether this is accurate.

However, during the four-day *Digital Futures* graduate exhibition in April a number of interesting observations and insights were collected when visitors engaged in short, open demo-sessions of the displayed “Little Bookcase Publications” v.3.0. During the crowded opening night, there were five or six



Figure 24 Picture of participants and spectators from the opening night of *Digital Futures* graduate exhibition in April. Credit: Hammadullah Syed, 2017.

sessions where participants tried a few rounds using the “Easy Start” objective card. These initial sessions drew in surrounding spectators with many wanting to become participants themselves. Despite the fact that I had made a sign-up sheet with 20-minute slots and 10-minute reset intervals, the fast turnaround rendered the sign-up sheet rather invisible. Indeed, this was fortunate and exciting as it allowed for more people to experience the game, but it was simultaneously rather disrupting as active players felt potential pressures from onlookers to give up their seats after roughly 10 – 15 minutes. Admittedly, the participants who had time to play were all newcomers to the game and thus rather dependent on me explaining the game. This lengthened the estimated time needed to play the tutorial objective considerably. Therefore, sessions usually ended after playing through one or two days of the seven-day objective

so the tutorial was actually never completed during the exhibit. However, many of those who played stated that they felt they had become less dependent on me having to explain potential moves and rules. This seems to reaffirm similar observations from v.2.5 where playing a few rounds is necessary for participants to become confident in regards to the game-mechanics and underlying Holacracy processes.

While I was humbled by the visitors' praise of the aesthetics and craftsmanship behind the making of the game, I noticed I was more interested in whether the game achieves its introductory function of Holacracy. During the demonstrations of v.3.0, I was looking for similar behaviors and observations of participants that had surfaced during the previous play-testing of v.2.5. Primarily, I wanted to observe whether players unaware of Holacracy would start to understand the reciprocal relationships underlying how governance roles and linked accountabilities affect operational projects and events and vice versa. Secondly, I wished to monitor whether the game-mechanics were relatively easy to comprehend and if they were balanced and engaging enough to allow for a fun but also challenging game. For all but one session, I participated as a player filling the Facilitator role to better illustrate the accountabilities and

Figure 25 Close-up of a participant playing v.3.0 from the opening night of *Digital Futures* graduate exhibition in April. Credit: Hammadullah Syed, 2017.



Figure 26 Picture of participants and spectators from the opening night of *Digital Futures* graduate exhibition in April. Credit: Hammadullah Syed, 2017.

function of that particular role. As with the play-testing session of the previous iterations, the purpose was also to streamline each session considering the context where most players were new to the game. I explained that the role of Facilitator acts as a referee of sorts for the governance meeting, and the partner filling this role attempts to keep that process sacred. Thus, during governance meetings, I set the expectation early on that if participants wanted to ask a particular question regarding the process or the game itself, they could ask for a time-out which would help me temporarily remove myself from the Facilitator role and explain as its implementer. With this in mind, I did not have the chance to test whether new players could effectively play the game relying either only on the updated v.3.0 rulebook for guidance, or the projected four-minute tutorial video.



Concerning other observations of participants interacting with the game's elements, I noticed in early sessions how they sometimes divorced the accountability cards from their parent role cards in such a way that they would arrange their accountability cards in one area in front of them and their role cards in another. Perhaps future design iterations might somehow better highlight these cards' interlinked relationships, or the explanation of these specific game-mechanics need to become more clear at the offset. Players seemed to enjoy the sense of ownership they gained when they created titles for authors' potential titles derived from the cards' illustrations. Examples of titles were "Pig Diner," "The Problem with Chess," "Flowah" and "Butt Chess." This activity also seemed to ease the atmosphere in making the game session feel more light-hearted at the offset. Then, when participants started to sincerely play the game by combining the game-mechanics using the sometimes silly publication titles as direct context for their actions, it reminded me of Huizinga's (1949) claims of how games can simultaneously be both playful and serious (p. 8).

A few other observations revealed that on more than one occasion, I forgot to first explain how the starting partner of each day first reveals an event card before spending their moves. Future iterations might need to make more clear the steps of each day so as to not forget the day's starting event. Another minor consideration was when a player was situated near the organization's funds, and they decided to spend some of it, they instinctively moved money cards from *outside* of the Operations board to its *inside*. This interaction is the direct inverse of the rules' intended one as cards laid on top of the Operations board signal what resources partners have at their disposal. I believe this might be because when one spends money they move it away from themselves. As this inverse interaction did not occur with players situated elsewhere around the board, I'm unsure whether future iterations need to address this. Lastly, I was curious whether the current reputation mechanics of affecting die rolls negatively or positively depending on "Little Bookcase Publications" reputation might be either too punishing or rewarding. It is quite hard to say as one group

was making very successful die rolls while another was having quite miserable rolls. The reputation tracker rewarded the lucky rollers while punishing the unlucky ones. A future iteration might need to take closer look at the distribution of the tracker's segments, or inverse the effects so as to make the game more challenging if the reputation is high and easier if the reputation is low. Subsequent versions might also take a hint from an older v.2.0 and make die rolls of six always result in one positive reputation point to combat the reputation tracker's penalizing effect to die rolls.

Participants that had the opportunity to try out Tuesday's governance meeting responded well for the most part to its structured process and its potential of keeping things on track. As v.3.0 of the game condenses Holacracy tensions as simplified proposals where additional accountability cards are assigned by players during governance meetings, there are certain limitations of this predetermined approach. For example, when players were making proposals for the drawn "Tidying shared workspaces" accountability card, on more than one occasion they would propose a shared accountability in favor of the game's intention of assigning it to a single role. In other words, the proposer might say "Each and one of us should clean up after themselves" in contrast to "I propose that 'Tidying shared workspaces' should be attached to the role of *Maintenance*." In Holacracy terms, such shared accountabilities would be termed as policies defined for domains shared by roles in the same circle. As "Little Bookcase Publications" v.3.0 excludes multiple circles, domains and policies in favor of fundamentals that I saw more useful for introductory means this inclination of players wanting to reach for more shared features was interesting. Some players even made proposals including explicit *role-relationships* where a role's new accountability would be interdependent or tied to another role. In this case, the accountabilities added thusly would in fact be made more explicit and clear. Therefore, the current v.3.0 iteration of the game faces limitations due to predetermined accountability cards as opposed to being created in a more freeform *paidia*-like manner by players themselves arising from their felt tensions. These observations highlight further potential for future iterations



Figure 27 Picture of participants and spectators from the opening night of *Digital Futures* graduate exhibition in April. Credit: Sunna Skúladóttir, 2017.

regarding shared spaces by including Holacracy domains and policies in one way or another. Moreover, this also hints at a potential inclusion of more *paidia*-esque elements which might allow for increased open-ended play that, arguably, might simulate more closely to how Holacracy functions in current organizations.

On two occasions, where I had tested and revealed participants' objections as being invalid during the Objection Round in governance meetings, the current game-mechanics do not allow said participants to add additional agenda items to address their potential tensions surfaced from this specific round. Moreover, two participants asked about the Objection validation process and what would stop them or others trying to *game the system* by knowing how to have their objections deemed as valid. In fact, a similar concern was raised during HolacracyOne's workshop in November which created an interesting discussion. From my perspective, as "Little Bookcase Publications" and Holacracy are co-operative systems where everyone wins or loses together, what is to be accomplished by such actions? Even in adversarial circumstances, Huizinga (1949) states that "...[t]o our way of thinking, cheating as a means of winning a game robs the action of its play-character and spoils it altogether,

because for us the essence of play is that the rules be kept – that it be fair play” (p. 52). In essence, there might not be anything that necessarily hinders an individual wanting to be clever and outsmart the system, other than the system’s transparent processes and rules which tend to shine a light on such endeavors making it quite accessible for peers to question or critique them.

In reference to Caillois’s classification of games, the design output’s v.1.0 initial *paidia* open-ended mechanics allowed for too much interpretation and there was a need for introducing more *ludus*-based structure for the game to serve its introductory function. Caillois’s notion of how improvisational *paidia*-esque options are still necessary in *ludus*-based games proved imperative but also quite difficult when figuring out a balance between a structured game fit for introductory means while still allowing for sense of creativity and multiple options for individual decision-making in a collaborative context. Indeed, further and repeated play-testing of the latest version might offer more precise data which might reveal whether the current version’s game-mechanics are balanced enough for engaging play (e.g., is the game too difficult or easy? Do the conceptual connections between the game context and Holacracy methods make sense? Is the game limiting or enhancing potential for emergent elements?). Similar to how Holacracy takes repeated practice for new practitioners to start to understand its processes and rules, the same seems to apply for “Little Bookcase Publications” as it could take players more than one game session to understand the fundamentals, and how the underlying game mechanics are meant to facilitate easier learning of Holacracy.

Despite some Holacracy elements being left out for later versions – such as the tactical meetings and the role of Lead Link – it is interesting to note how consistent the inclusion of roles was with every iteration. As roles are the core units of a Holacracy structure, it seemed vital to extract these for the game-mechanics in building a foundation for players to understand the method’s inner workings. Relating to reciprocal relationships evident in *complex* contexts and systems-thinking to “Little Bookcase Publications,” the game mechanics and elements developed must incorporate some potential for cyclical causality

without disorienting new players who are trying to grasp the underlying method. Surely, as Holacracy seems to be an organizational system for complex environments with multiple interplaying elements there is a tricky balance of condensing the rule-based quality of Holacracy while still creating a simple enough on-boarding game that is engaging and fun to play. The game at this point might be able to fulfill its purpose of introducing some of Holacracy fundamentals via contextualized gameplay, but as v.3.0 might need to be further play-tested with participants for more than 10 – 15 minutes at a time, such claims need further validation.

In the following chapter I will summarize conclusions and highlight options for future iterations, research and development of “Little Bookcase Publications” as an introduction to Holacracy through play.

5 Conclusion

5.1 Review of Previous Sections

In “1. Introduction” I put forth the following research question to grant a shared view for the thesis document: *Given that organizations wanting to implement a peer-to-peer organizational method like Holacracy are likely to expect an initial learning curve, how might its fundamental rules and elements be extracted as a role-playing game structure for on-boarding?* To start exploring this research, in “2. Context Review” I first provided an overview of both the practice of Holacracy and its relatively short history, along with potential benefits and implications as observed by practitioners and non-practitioners. Then, I offered how the method might be viewed as being part of a larger, emerging organizational paradigm called *Integral-Teal* as is observed in other similar approaches within organizational development theory. Further insights and details were analyzed in regards to how the system appears to thrive in more complex contexts. I observed that Holacracy is a rule-based system fit for post-industrial *learning organizations* that wish to continually increase their capacity and responsiveness in a fast-paced, interconnected world. Then, to analyze potential deeper theoretical and practical connections to the applied role-multiplicity and explicit rulesets found in Holacracy I offered additional studies of role performance and play theory which in turn informed the development of an introductory board game to Holacracy fundamentals.

In “3. Methodology” the particular design process and iterations were highlighted as the techniques applied shifted due to insights gained through the context review along with the primary qualitative data collected via rapid ethnographic fieldwork. I explored how the applied research-oriented

design approach had subsequent versions of “Little Bookcase Publications” be informed by previous versions via particular play-testing sessions where Holacracy practitioners as well as non-practitioners offered insights via hands-on experience of the game. This particular iterative design approach not only helped in validating or invalidating assumptions, but it also mimicked the overall practice of Holacracy where practitioners in their roles surface grounded tensions to incrementally adapt their governance and operations.

In “4. Findings” I provided a summary of the latest v.3.0 of “Little Bookcase Publications” along with a number of observations that surfaced from the game’s open play-testing sessions during *Digital Futures* graduate exhibition in April, 2017. Further insights were revealed regarding extractions of certain Holacracy fundamentals fit for an introductory game as well as how there seems to be a tricky balance to strike when attempting to create rule-based game-mechanics that still allow for a sense of open-endedness to underline the creative and emergent qualities found in the iterative approaches of Holacracy. I reveal that the game’s v.2.5 showed promising signs of play-testers becoming familiar with the selected fundamentals of the practice via repeated gameplay, and that the latest version seemed to confirm similar notions. As the conditions and relative participants in the play-testing of v.3.0 were quite time-constrained, however, it might still be premature to tell whether this is accurate. To this end, further and repeated play-testing of the latest version might offer more precise data which also might reveal whether the game-mechanics are balanced enough for fun and engaging play.

5.2 Future Research

In April of 2016, I observed the striking hypocrisy of certain Icelandic political figures – such as the then-acting Prime Minister, Minister of Finance and Minister of Justice – whose names were revealed in the *Panama Papers*, a “...giant leak of more than 11.5 million financial and legal records [which] exposes a system that enables crime, corruption and wrongdoing, hidden by

secretive offshore companies” (The International Consortium of Investigative Journalists, April 2016). The overwhelming and obvious conflict of interests of these individuals in their elected roles led to one of the largest public demonstrations held in Iceland. In today’s post-industrial networked societies, where individuals are able to self-organize and seek out all kinds of knowledge and rapidly build movements, do we still need representative democracy in its current form? Might a peer-to-peer organizational method like Holacracy – with its transparent rules and integrative processes – have potential for upgrading not only organizations’ structures but also today’s democracies in addressing representatives’ role-conflicts of interests? Maybe and maybe not, but the method seems to me a potential step in an interesting and encouraging direction. When Olivier Compagne of HolacracyOne asks Robertson in a webinar if Holacracy might be influential in a greater societal context, Robertson responds:

(HolacracyOne, June 13, 2014)

If we want to have a world with purpose-driven companies that are engaging only in voluntary transactions that don’t externalize costs or harm others, we need more than just Holacracy. Holacracy can help – internally – one company, it can make it a lot more conscious [...] but in our broader world we need more than just that: we need a system in play that limits the ability of companies to dodge evolution to get to the easier means of using violence – directly or indirectly. [...] We want companies only being able to amplify their affect in the world if they’re truly generating value without harming others.

On a similar topic, during the project’s thesis defense a wonderful dialogue emerged regarding Holacracy elements extracted for the creation of a co-operative board game as well as the method’s potential broader impact within organizations and in even broader societal and political contexts. While the method of Holacracy aims to maintain neutrality by assuming the stance of an organizational tool, it is ultimately through the individuals themselves who are filling the organization’s roles that operational and organizational change

occurs. Arguably, individuals with their diverse value systems and mental models are seldom neutral in and of themselves, so how can the parent system of which they are energizing remain neutral? What is to stop a person wanting to, say, subvert the system for their own personal gain or use the system as designed but for a purpose that might not be viewed as ethical or fair? But, in a co-operative context where everyone wins or loses together, what exactly is to be gained by doing so? This line of thinking tends to remind me of how a hammer might be designed as a tool for hitting nails, but it can just as well be used to inflict bodily harm on to others. In the latter occurrence, who is to blame? As an organizational tool, Holacracy is meant to be practiced by human beings stewarding artificial roles with emergent rule-sets surfacing as decision-making aid from adaptive iterations in service of a higher purpose. In doing so, it can be argued that even though the method's role-focused processes and elements are not political in a direct sense, they become so – for better or for worse – the moment people start to steward, maintain and evolve such entities and actions. To espouse the iterative *Integral-Teal* perspective would seem to require the facing of such realities with *both* an open-mind *as well* as a critical eye as opposed to *either* fearfully reject the tool *or* embrace it blindly.

Moreover – on the topic of paradoxical reasoning – it can be argued that Holacracy with its service-focused application through collaborative stewardship has potential of reproducing both capitalist and socialist values. This appears to strike a difficult cord with particular proponents of each extreme of such a political spectrum as they seem inclined to look for how the method might be (mis)used by the opposing view and is therefore doomed to fail. For example, a writer for *The Socialist – The Official Publication of the Socialist Party USA*, Travis Dicken, observes that “...Holacracy will likely become a privilege of certain, more elite, workers and will be used as the carrot to keep lower classes of workers moving forward through the profit machines of capitalism” (Dicken, July 9, 2015). A contrasting view is offered by Gary Isabell at *The American Society for the Defense of Tradition, Family and Property* who ponders the “...impossibility of the socialist dream in general and self-

management in particular” and claims that Holacracy is a “...mix of Marxist errors [and] is nothing more than a repetition of failed French self-managing socialism” (Isabell, January 1, 2016). For a person like me who individually tends to search for ways to integrate multiple views towards an actionable outcome, it strikes me as a particularly intriguing observation that both of these writers would view Holacracy as either something potentially sinister or naïve created by or for the seemingly opposing other. It will be quite interesting and perhaps promising to observe how the complex, systemic and integrative approaches of *Integral-Teal* paradigms – like the ones found in Holacracy – might aid in moving such polarized viewpoints to a meta space allowing for them to coexist.

With these broad ideas in mind – along with the encouragement of my advisors – I would like to expand my future research to include further feminist writing and non-Western literature. There appears to be acknowledged limitation of Laloux’s work which seems to privilege Western colonized efforts and progress while indigenous societies seem to have known and practiced for a long time the cyclical, systems thinking Senge makes an example of above. Senge (2006) himself writes that “...frontiers of Western science, the underpinning of our modern worldview, are revealing a living world of flux and interdependency *strangely familiar to aboriginal and native cultures*” (1%, location 107, emphasis mine). Kaner (2014) voices similar observations, stating “...we’re starting to come full circle – from the circle of the tribe around the fire, to the pyramidal structures of the last 3,000 years [...] to the ecology of the circle, flat pyramids, and networks of today’s organizations” (p. xvii). Likewise, Holacracy practitioner Jessica Prentice cautions readers against regarding the post-industrial paradigm of *Integral-Teal* as a new discovery:

(Prentice, May 25, 2016)

At the end of Reinventing Organizations, Laloux speculates about what an “Evolutionary-Teal” society might look like. He consults “futurists and mystics” without consulting the work of Native spokespeople, anthropologists, and others who have documented “Teal” societies which functioned successfully for millennia. While we don’t know what the future

will look like, these traditional societies give us the greatest actual evidence of the functionality, sustainability, and ultimate promise of these so-called “new” approaches. If we don’t learn from our successes as species, in the course of reinventing organizations we will spend a lot of time reinventing the wheel.

For the co-operative game of “Little Bookcase Publications,” a great scenario would be if players of the game would indulge in introspective self-reflection and take away inspiration and ideas regarding alternative organizational behavior to lead in their own lives. Indeed, during the *Digital Futures* graduate exhibition many of the follow-up talks I had with participants and spectators concerning the latest version of the game were very interested in learning more about Holacracy. Moreover, I aim to continue working on further versions preferably alongside a certified Holacracy provider such as HolacracyOne to better validate certain inclusions and exclusions of the method’s processes and artifacts. Additionally, further play-testing sessions will also help realize whether the inherent game-mechanics are balanced enough to allow for engaging play while learning about Holacracy. While the game in its current format contextualizes learning Holacracy specifically via a publication company, there is potential to extract particular elements in such a way that the game can offer expansion packs based on diverse industries. For example, during the project’s thesis defense, there was intriguing ideas about whether a version of the game might be influenced around social movement building – not unlike the co-operative board game *Rise Up* (Peters, October 11, 2016) which revolves around “...building people power and taking on oppressive systems to create change.”

Furthermore, since the current game is focused on teaching Holacracy fundamentals there is room for additional development which can result in a more open-ended game for more seasoned Holacracy-practitioners. After having attended HolacracyOne’s five-day Holacracy Practitioner Training workshop in November– where I demoed v.i.o of the game – this event

put me in direct contact with Brian Robertson, Alexia Bowers and other partners at HolacracyOne who then later play-tested and reviewed the game's subsequent v.2.0 in January, 2017. The aim post-graduation is then to reach out to HolacracyOne or other certified Holacracy providers, and see if they would like to collaborate on a more formal basis in further developing the game. There is potential for the game to be used in workshops and possibly be distributed to Holacracy-run organizations that might need low-risk, experiential tools for new hires who are traversing the complex landscape of Holacracy.

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Appendices

Appendix A Glossary of Holacracy Terms

A full coverage of all Holacracy processes and elements is arguably out of scope for this particular format. Nevertheless, a number of basic distinctions are stated to offer a broad overview and validate some of the actions taken when developing the Holacracy role-playing game accompanying this essay.

Role

Robertson (2015) states, the “...whole point of Holacracy is to allow an organization to better express its purpose” (p. 34) and “...purpose becomes the anchor for decision making at every level and in every sphere of activity” (p. 34). This is as true for an organization’s higher purpose as it is for individuals’ roles. To express a purpose in actionable terms, a role needs accountabilities – explicit, ongoing activities captured in transparent governance records that peers can count on relevant roles to own. All too often, people have different ideas and expectations of what they ought to be doing and “...this lack of clarity leads to all sorts of interpersonal friction and politics” (Robertson, 2015, p. 40). For example, the *Proofreader* role at “Little Bookcase Publications” has the following purpose of “OCD-esque top notch filtering of type-O’s and weird grammar.” This particular role starts with a single accountability card of “Proofreading our Authors’ scripts.” Lastly, roles can also have domains (e.g., website’s server, organization’s social media accounts) which are similar to property laws in that you probably should ask a neighbor first for permission before borrowing their

car. Domains are considered quite a *hammer* (HolacracyOne, November 7 – 11, 2016), and should be used sparingly when first adopting Holacracy so as to not create too many restrictions at the get-go. Domains nor related policies are included for v.3.0 of the game.

In diffusing the ego from a singular job title for the sake of many, this key distinction of roles versus individuals seems to aid in minimizing what Caillois refers to earlier in play theory terms as the *corruption of mimicry*, and Senge's (2006) organizational learning disability of "I Am My Position" (5%, location 449). Robertson (2015) explains that the "...organization's governance records describe its overall structure in detail and can be used to identify the expectations and authorities held by each role" (p. 78). Moreover, people that practice Holacracy consciously refer to these records regularly, often multiple times a day. While organizations operating from more traditional top-down hierarchical structures seem likely to have a traditional tree-like organizational chart it arguably seems just as unlikely that conscious attention is given on a daily basis to this kind of governance when it comes to looking up expectations, defined authorities and responsibilities. In helping adaptors and practitioners realize their governance records, HolacracyOne provides and maintains a web-based software platform called *GlassFrog* (HolacracyOne (n.d.)).

Circle

A functionary collection of roles and not a department nor a team. As circles are created when the functions of a single role prove to much for one individual to handle this is unlikely to occur in "Little Bookcase Publications" so the concept of circles will not be introduced in the game.

Lead Link

The role of Lead Link is not unlike a cell membrane allocating resources to roles within the circle. A lot of managerial skills can be seen in these roles so

project managers of previous paradigms gravitate towards these roles in early adoptions. An individual's stewarding a Lead Link role is reminded that it is just another role and it has no more decision-making power over other roles. In Robertson's (2015) words, "...[a]s lead link, rather than directing the action, you hold the space within which the purpose of the circle can be fulfilled, and you keep out issues and concerns that are not within the scope of that circle" (p. 51). During the game's development, the role of Lead Link was removed for v.2.5 and onwards.

Facilitator

The purpose of a Holacracy Facilitator is to "...[c]ircle governance and operational practices that are aligned with the [Holacracy] constitution" (Robertson, 2015, p. 66). This role has the accountabilities of "...[f]acilitating the circle's constitutionally required meetings" and "...initiating the restorative process defined in the constitution upon discovering a process breakdown" (Robertson, 2015, p. 66). In other words, the role is the walking-talking version of the Holacracy constitution, and therefore resembles a referee during governance and tactical meetings as they protect the particular sphere of the meeting process by stopping out-of-turn interactions and guide participants back into process. Kaner (2014) reveals parallels in their observations of how a "...content-neutral" facilitator "...enables [...] organizations to work more effectively (p. xx).

Secretary

The Secretary role's purpose is to "...[s]teward and stabilize the circle's formal records and record-keeping process" with one of their accountability being "... [c]apturing the outputs of the circle's required meetings" (Robertson, 2015, p. 67). This role resembles the one of an archivist or scribe that documents and stewards outputs from governance and tactical meetings which then every

individual in roles look up to align their operations. It is preferable to have separate individuals stewarding the role of Facilitator and Secretary to ensure increased focus during Holacracy meetings.

Governance Meeting

Whenever an individual in a role senses a tension regarding expectations and ongoing accountabilities or purpose set in the organization's governance records, they bring these to governance meetings for processing. Thus, the only accepted outputs are amendments, creations or removal of roles and their respective accountabilities and domains. New practitioners traversing these new grounds express how "...[a]t the beginning, the old way of conducting meetings seems faster, but the moment one starts playing by the rules of the process, the meetings actually become faster and more productive" (Energized.org, July 7, 2016). These specific acknowledgements were echoed in August 2016 by students who participated in a Holacracy governance meeting simulation I ran as part of my final project for *CFC Prototyping Lab* (see *Appendix D.1*)

Compared to Holacracy tactical meetings, the governance meeting is more rigorously structured and follows the following five rounds:

1 *Check-in Round*

"One at a time, each participant has space to call out distractions and orient to the meeting" (Robertson, 2015, p. 69). Kaner (2014) illustrates how a check-in "...provides a transition from 'outside the meeting,' to 'inside the meeting'" (p. 207). It would seem that participants are "...mutually withdrawing from the rest of the world and rejecting the usual norms" (Huizinga, 1949, p. 12) in retaining the *magic circle* or sacred sphere of the governance meeting.

2 *Administrative Concerns*

"Quickly address any logistical matters, such as time allotted for the meeting and any planned breaks" (Robertson, 2015, p. 69). For v.2.5 of "Little Bookcase Publications" players set a timer of 10 – 20 minutes for the duration of the governance meeting depending on their experience with the process.

3 *Agenda Building*

“Participants add agenda items, using just one or two words per item. Each agenda item represents one tension to process” (Robertson, 2015, p. 69). The individual filling the role of Facilitator captures participants’ exact wording for each agenda onto a shared space. Kaner (2014) explains how such documentation not only validates the participants’ contribution but also can increase the participation of quieter individuals, for “...when people’s ideas are written on flipcharts that everyone can see” (p. 66) it allows *group memory* to emerge.

4 *Integrative Decision-Making*

“Each agenda item is addressed, one at a time, using the Integrative Decision-Making process” (Robertson, 2015, p. 70). See continued, below.

4a *Present Proposal*

An agenda item owner is granted space to describe the underlying tension and make a proposal to solve it. The proposer is the only one who speaks this round and there is no discussion. Robertson (2015) explains how “...the proposer can optionally request discussion just to help craft a proposal, but not to build consensus or integrate concerns” (p. 72). As with the previous documented agenda items, Kaner (2014, p. 353) stresses the importance of capturing the proposal in writing as this gives tangibility and shared reality which might otherwise be misinterpreted.

4b *Clarifying Questions*

“Anyone can ask clarifying question to seek information or understanding. The proposer can respond or say ‘not specified.’ No reactions or dialogue allowed” (Robertson, 2015, p. 72). Here, and in the Amend & Clarify round, Kaner (2014, p. 352) reveals similar approaches from other participatory methods where clarifying questions can help bring the group on to the same page.

4c *Reaction Round*

“Each person [except proposer] is given space to react to the proposal as they see fit” (Robertson, 2015, p. 72).

4d *Amend & Clarify*

“The proposer can optionally clarify the intent of the proposal further or amend the proposal based on the reactions, or just move on. No discussion allowed” (Robertson, 2015, p. 72). The proposer is urged to be selfish for their tension and not feel peer-pressured into amending their proposal having heard the previous reactions.

4e *Objection Round*

The Facilitator asks each participant, one at a time, the following question: “Do you see any reasons why adopting this proposal would cause harm or move us backwards?” (Robertson, 2015, p. 72). The objections are then tested by the Facilitator who uses a series of particular either-or criteria questions aimed to filter out unhelpful objections (see v.3.0’s rulebook in *Appendix E*).

4f *Integration*

The objections passing the validation test in the previous rounds are captured and focused on, one at a time. Robertson (2015) explains how the goal “...is to craft an amended proposal that would not cause the objection, but that would still address the proposer’s tension” (p. 72). Once all objections have been integrated this way for this particular agenda item, the previous 4e. *Objection* round is repeated.

5 *Closing Round*

“Once the agenda is complete or the meeting is nearing its scheduled end, the Facilitator gives each person space to share a closing reflection about the meeting” (Robertson, 2015, p. 70).

Tactical Meeting

Robertson (2015) illustrates how tactical meetings are “...fast-paced forums to synchronize team members for the week and triage any [operational] issues that are limiting forward progress” (p. 94). These meetings resemble governance meetings insofar as they are structured and organized, but they are

not as strict. As of v.2.5 of “Little Bookcase Publications,” tactical meetings are dropped entirely as co-operative board games can arguably be seen as on-going operational tactical meetings in and of themselves. For illustrative purposes to this point, and to offer an overview to compare with the non-participant observation run at *Company A* during rapid ethnographic fieldwork (see *Appendix c*), I include the below meeting process and how it resembles the transparent access of information needed for a co-operative game setup.

1 *Check-in Round*

See governance meeting, above.

2 *Checklist Review*

To bring “...transparency to recurring actions [...] [f]acilitator reads a checklist of recurring actions by role; participants respond ‘check’ or ‘no check’ to each” (Robertson, 2015, p. 95)

3 *Metrics Review*

To “...[b]uild a picture of current reality [...] [e]ach role assigned a metric reports on it briefly, highlighting the latest data” (Robertson, 2015, p. 95).

4 *Progress Updates*

To “...[r]eport updates to key projects of the circle [...] [t]he Facilitator reads each project on the circle’s project board and asks: ‘Any updates?’ The project’s owner either responds ‘no updates’ or shares what has changed since the last meeting” (Robertson, 2015, p. 95).

5 *Agenda Building*

See governance meeting, above.

6 *Triage Issues*

To “...resolve each agenda item [...] Facilitator asks ‘What do you need?’” (Robertson, 2015, p. 97). The agenda item owner can engage other participants as needed to ultimately capture potential next-actions or projects to solve the operational tension. To keep things on track, Facilitator then asks “...[d]id you get what you need?” (Robertson, 2015, p. 96).

7 Closing Round

See governance meeting, above.

Appendix B Interview at a Holacracy-run Organization

The documented semi-structured interview includes six predetermined questions with responses transcribed from audio files, and additional analysis and connotations to previously covered theory added in later. Adhering to a Research Ethics Board confirmation (see *Appendix G*), anonymity will be maintained.

1 *For how long has [Company A] been practicing Holacracy?*

During the interview, *Practitioner A* told me how their 16-person digital agency had been practicing Holacracy since 2013. The implementation came about when they were researching methods of how their rapidly growing organization might scale in the coming months and years. The general feeling within the organization was that they did not want to resort to departments as a scalability mechanism. In 2013, *Practitioner A* attended a Holacracy Taster Workshop and brought back the lessons they had learned. Deciding that they wanted to give Holacracy a go, the organization's members all read the Holacracy constitution and then their now-former CEO formally signed the Holacracy constitution, thus ceding into the shared rulebook whatever explicit *and* implicit authority they might have had before.

2 *What have been the major pros of introducing Holacracy at [Company A]?*

The major improvements of running on Holacracy, the interviewee explains, is the increase in organizational clarity provided by the method's pathways of making explicit the numerous implicit expectations that might surface from day-to-day operational work. *Practitioner A* explains that for them the processes are not intrusive and with practice have gradually faded into the background and become second nature. Moreover, Holacracy has granted a common language revolving around conflicts and tensions seen not as crises

but opportunities. For example, if someone is frustrated about something and states that “I have a tension about ...,” then others instinctively know it is nothing personal and is instead valued as an opportunity for clarification and improvement to the organization’s capacity of fulfilling its purpose. The governance and tactical meetings have set certain fundamental rhythms for other meetings where the former replaces big reorganizations with micro reorganizations based in grounded reality checks, and the latter are laser-focused operational status meetings without lengthy, off-topic agendas. *Practitioner A* remarks that while Holacracy has been transformative for the organization up until this point it is unnecessary to define everything in their day to day activities in Holacracy terms. If something just works, it works. For example, there is no need to over-engineer everything in HolacracyOne’s GlassFrog, which is *Company A*’s tool of choice for managing their governance records.

3 *What has been the toughest learning-curve at [Company A] when adopting Holacracy?*

The unlearning of parent-child dynamics is a common obstacle. When people are used to boss-subordinate relationships, Holacracy can at first feel very complex and overwhelming. People can falter and lose a bit of faith in Holacracy as a practice, and among possible reasons is that in a Holacracy context people can no longer rely on office politics to get things done when working around the formal, top-down structure. Individuals need to learn to trust this new system and become disciplined in self-managing operations, sensing tensions and – most importantly – processing them instead of waiting for someone else to fix their problems. When this happens the political power struggle and dependence on relationships is lessened for such approaches are rendered near meaningless in a transparent, rule-based Holacracy context. As of Holacracy constitution version 4.1, traditional compensation and hiring/firing is not specifically dealt with and instead numerous practitioners have devised various applications and methods that they share with each other – for example,

via the *Holacracy Community of Practice* (HolacracyOne, n.d.). While *Company A* had looked into badge systems as a way of determining compensation, they are currently using a approach which entails that a member can make a case to a committee which then contacts the member's closest team members for confirmation and guidance. The interviewee explains that the absence of specifics in regards to hiring in this new context has sometimes been difficult to deal with. Although, they believe things seem to be progressing in such a way that relative teams closest to the certain operations are now handling interviews instead of individuals filling roles that might not have the most accurate picture of what is needed of a new recruit in that specific context.

- 4 *When implementing the transparency of data needed for Holacracy (salary, financial statistics, projects, more?), how has that worked out when times are good and then when times are hard?*

Concerning the apparent necessity of accessibility and transparency of data to all active practitioners at a Holacracy-run organization, the interviewee explains how *Company A* already realized the necessity of such a reality when it came to enabling autonomous staff members prior to adopting Holacracy. Apparently, that this culture was in place beforehand helped adoption of Holacracy immensely.

- 5 *In regards to Holacracy governance meetings, can you think of any similarities of that process to other fields, f. ex. role-playing games?*

While no immediate games came to *Practitioner A's* mind, they responded that "...life is a game" where we have all these implicit and explicit rules governing our lives.

- 6 *Where do you see [Company A] headed in the next five years with Holacracy?*

The interviewee remarks how difficult it is to answer this question when dealing with today's rapidly changing environments and operating within a system that encourages you to change direction often and incrementally based on surfaced data. For now, to offer something, *Practitioner A* reveals that they project that *Company A* might call for 50 additional partners within five years.

Their preferred approach, however, is to base themselves in reality at certain intervals and steer dynamically towards or away from this or any previously made projection. *Practitioner A* reminds me that Holacracy is developed from methods such as Agile software development so it is inherently not a waterfall, predict-and-control strategy system. Since 2008, *Company A* has been developing their own emergent operational system which gathers numerous approaches – one of which is Holacracy, added in 2013 – and thus *Practitioner A* projects that with more Holacracy *apps* becoming available it is likely that more practitioners will take up Holacracy as their main operating system of not only getting operations done but also evolving their governance via the peer-to-peer system.

Appendix c Non-Participant Observation of a Tactical Meeting

Following the interview at *Company A*, and using the same small meeting room with relevant data, the five practitioners present explained that the roles they would be stewarding for this specific 30-minute tactical meeting were located within the organization's "Outreach" circle. While the allowed outputs of a governance meeting are changes captured in the organization's governance records, the specific operational outputs of tactical meetings are *next-actions* and *projects*. The partner stewarding the role of Facilitator started off the meeting with its "Check-in" round by throwing a soft ball as a form of talking-stick to another practitioner who shared what was on their mind in order to get present. Such a round, according to Kaner (2014), "...builds group cohesion [...] and lets everyone participate in a common activity right from the first moments of a meeting" (p. 207). This particular Holacracy-run organization lists a set of emotions to help get people going in forming their check-in's: happy, sad, excited, and afraid. A sample of slightly paraphrased responses already includes a wide gamut: ranging from operational issues such as "I'm excited and afraid that I've got a lot on my plate right now" and "I'm happy how much focus I mustered before noon on my projects" to *role-ationship* issues such as "I'm happy

that a colleague of mine and I are improving our communication with each other in our roles.” Further responses were more family-based: one practitioner expressed surprise of how they were feeling a bit emotional when dropping kids at their first day of school that morning, and another was a bit preoccupied with planning work around maternity/paternity leave. When each practitioner was done, they ended on a quick “check” and then passed the ball to another random practitioner who repeated the process. Interestingly, the Facilitator decided to offer me to participate and share my own “Check-in” for this round before they dove into more operational matters. I appreciated the opportunity to get present and shared with the space my relevant feelings on being there at that time.

Now that everybody had had a chance of sharing their “Check-in,” I resumed my role as a non-participant and the Facilitator moved, in order, to the subsequent rounds of “Checklist Review,” “Metrics Review,” “Project Updates,” “Agenda Building,” and “Triage Issues.” At this point, the meeting really picked up pace with practitioners referring to the visual management artifacts on the walls and using individuals’ names and roles in a way that, for an outsider like me, was increasingly hard to keep up with. At times, when I felt the process was breaking down into more topical discussions – for example in “Triage Issues” where practitioners’ captured tensions during the previous “Agenda Building” were being processed – the Facilitator did a fairly good job guiding practitioners back to focusing on one tension at a time and reminding the tension’s owner by asking them the trigger questions “what do you need?” and “did you get what you need?” The appropriate outputs of next-actions and projects to each tension were captured for all to see and by the relative tensions’ owners. It was unclear whether the Secretary captured each one as well, as the Holacracy constitution states that if “...any Next-Actions or Projects are accepted during this discussion, the Secretary is responsible for capturing them and distributing these outputs to all participants” (HolacracyOne, June 15, 2015).

For the “Closing” round, each practitioner – including me – shared their experience of the meeting in a similar fashion to how the “Check-in” was

conducted. In contrast to my own experience, I offered my perspective of how the whirlwind-like pace of the meeting did not seem to phase the practitioners' efficiency or focus when it came to surfacing information and processing tensions. While seeming to empathize with my viewpoint for a moment, the practitioners neither boasted nor bragged about what I had just witnessed and sincerely viewed the process as just another operational tactical meeting. I left *Company A* that day inspired to one day feel myself and share with others the members' confidence and experience in Holacracy processes.

Appendix D Chronological Version History of “Little Bookcase Publications”

D.I *v.0.1, Initial Explorations (Summer, 2016)*

During a 2016 summer course at OCAD called *CFC Prototyping Lab*, we were encouraged to dig deep in our search for a core reason that could drive our thesis projects. Being born in Iceland in 1988, I witnessed the inherent egalitarian cultural psyche be entwined and reformed with the rise of personal computers and increased access to the Internet. In more recent years, I had discovered an unsustainable habit of where I am constantly wanting to mediate different people's opinions towards an actionable outcome while trying to tend to my own projects. As Senge (2006) explains, this managerial group work method combined with the proactiveness of wanting to “...stop waiting for someone else to do something, and solve problems before they grow into crises” (1%, location 489) is all too often reactivity in disguise. The opportunity was then to turn the mirror inwards and reveal how I, myself, contribute to my own problems.

Having discovered Holacracy as something that might have great potential in regarding possible improvements to the issues mentioned, I developed a participatory elicitation exercise where four participants role-played roles

at a fictional tech-innovation agency while running a governance meeting (Viðarsson, August 29, 2016). The talk the participants and I had afterwards – along with the results from the open questionnaire I had them fill out – confirmed a few important notions:

- ✦ An individual stewarding the role of the Facilitator needs to be somewhat familiar with the process beforehand. Without proper guidance or support materials, it can make things difficult if the Facilitator is learning the governance meeting process at the same time as other newcomers. Moreover, this can lead to consensus forming around interpretation of the rules which skews and distorts the entire experience.
- ✦ If using the term *tension* – i.e. a creative opportunity often surfacing from implicit assumptions and role-conflicts – a prior understanding of this specific definition would be helpful as the word itself clearly means different things to different people.
- ✦ Participants felt that the governance meeting process was slow, but offered that more gradual learning with a more experienced Facilitator might speed up participants' efficiency in the long-term.

Due to the sequential structure of a Holacracy governance meeting, I was curious to see how might such a process be visualized as a board game layout. I created a quick visual representation of the meeting process with the addition of roughly the same fictional roles depicted in one of HolacracyOne's governance meeting webinar introductions (HolacracyOne, February 21, 2012). For this idea, there was no actual operational work for players to surface tensions on their own so predetermined tensions were included on the role cards. This initial idea would serve as a catalyst for further iterations and explorations.

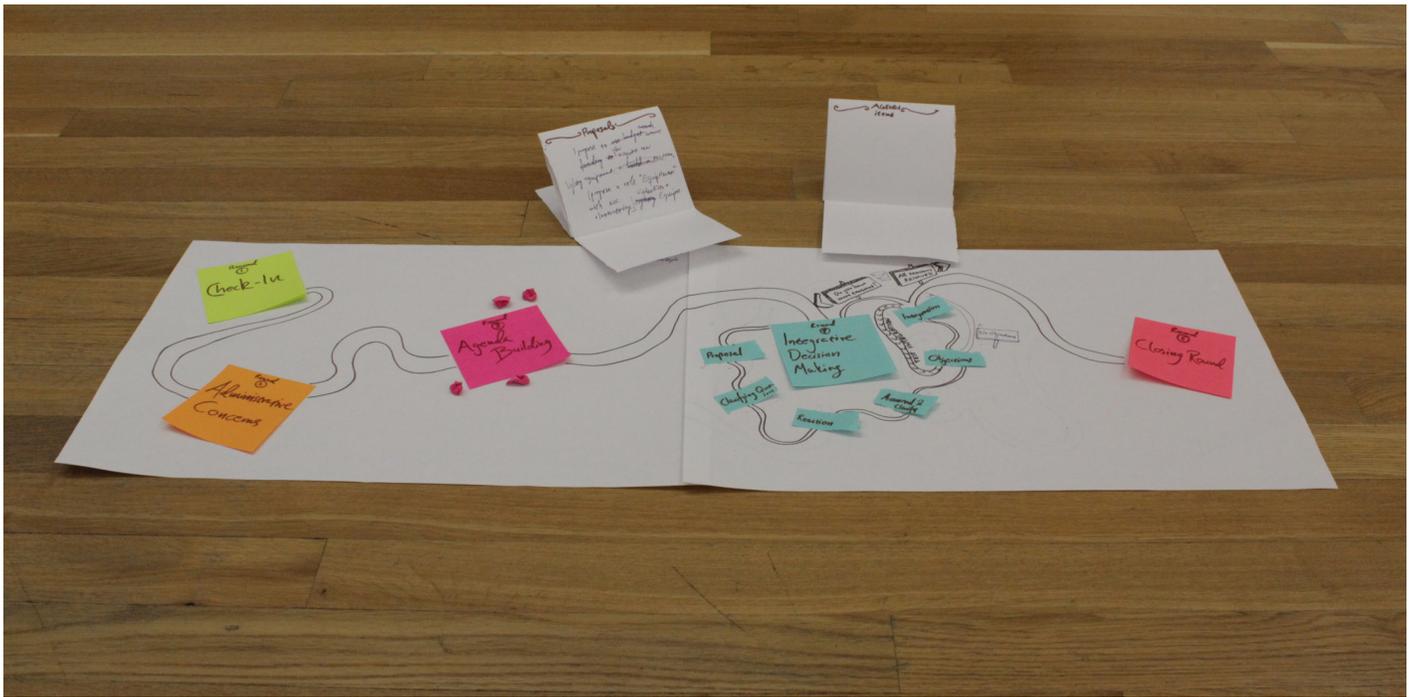


Figure 28 Holacracy governance meeting visualized as a rapid paper prototype.

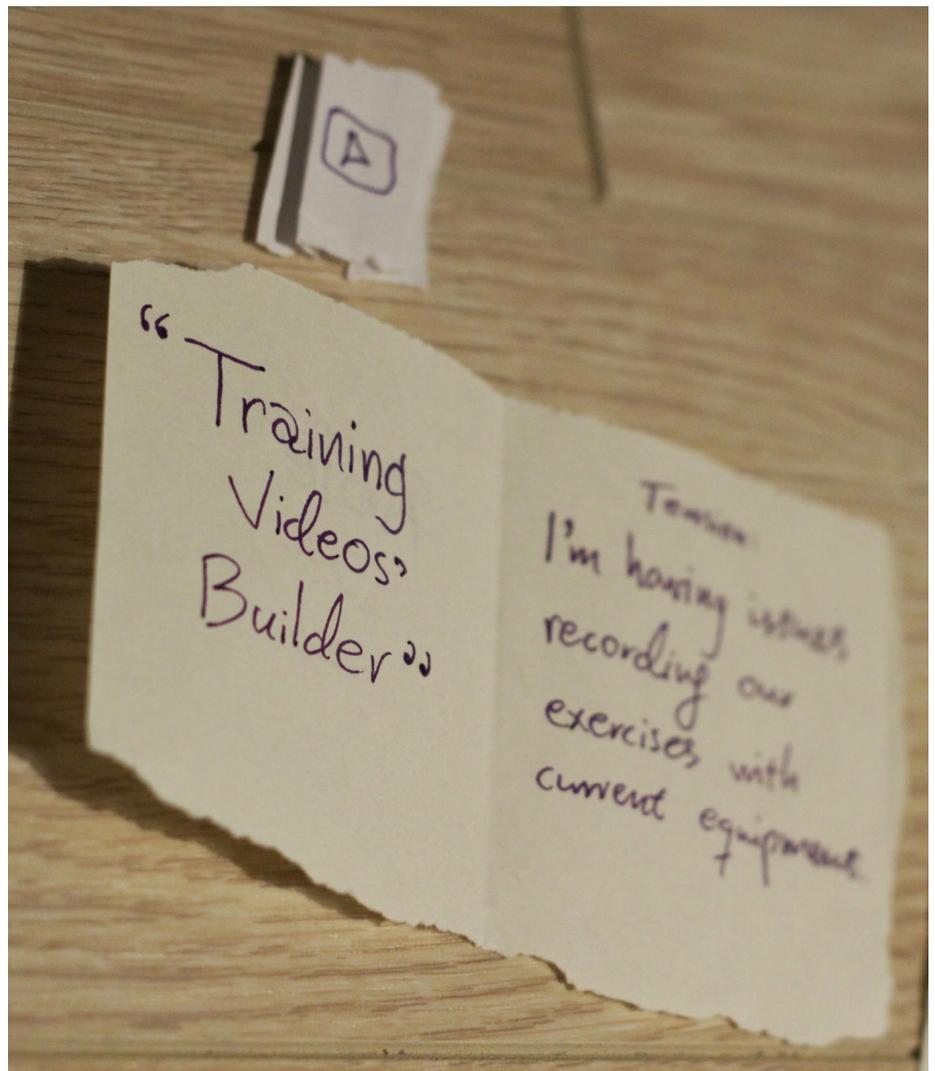


Figure 29 A role card with a predetermined tension.

D.2 v.1.0 (October – November, 2016)

At the *Digital Futures* program's colloquium in late September, I presented a small introduction to the Holacracy method along with proposed theoretical frameworks, concepts and outputs in realizing approaches for familiarizing non-practitioners with the system's processes and artifacts. I explained that up until this point, I had recognized through numerous literary reviews and case studies – along with the primary data collection via fieldwork – that adopting and maintaining Holacracy seems to be more of a practice rather than theory. Hence, particularly for individuals used to *Achievement-Orange* and *Pluralistic-Green* organizations (see “2.2.1 Updating Organizations as Integral-Teal”) Holacracy has a steep learning curve. Referencing play theorist Caillois (2001 [1961]), who offers that “...play tends to remove the very nature of the mysterious” (p. 4), I believed the primary objective of my design output might be to serve as a multi-user web platform that introduces Holacracy through a cooperative, role-playing game experience.

Noting key sources of inspiration that all share the utility of emergent play, active role-playing and multiple play-sessions, I referenced Blast Theory's et al. *Day of the Figurines* (2006), *Dungeons & Dragons* v.3.5 (Cook et al., 2003) and the board game of *Pandemic: Legacy* (Leacock and Daviau, 2015). The idea was that at any point at the week-long graduation exhibit in April 2017, visitors could sign up to play using their own mobile devices, and in doing so, they could start playing immediately. By first choosing preset roles to steward and enact their accountabilities and purpose, visitors would eventually push towards emergent, cooperative creation of additional roles and relevant artifacts in service of a collective purpose. Simultaneously, in an attempt to turn visitors from spectators to active participants, the design presentation would aim to grab their attention by referencing the aesthetic setting of playing a board game by visually representing the already active participants' progress and actions via projection mapping on to the top of a surface.

I believe the reasons for me later moving away from this proposed digital-focused output in favor of a more analog, table-top version to introduce

Holacracy via a role-playing game are various. First of all was the consideration of a proposed target group for the design output: am I only designing for visitors that might attend the OCAD's week long *Digital Futures* graduate exhibition – who know little or nothing of Holacracy – or should I aim for a longer impact instead and target individuals in organizations that might be contemplating the implementation of more *Integral-Teal* approaches as their main operating system of governance and operations? Another consideration was of technical scope. I admit that being an interdisciplinary “jack of all trades” designer allows me to wear different hats and steward multiple roles based on the various skills I might maintain. However, while I am quite adept at front-end developing and coding, the potential issues of maintaining a large user base while structuring and figuring out users' multitude of inputs and outputs through custom game mechanics seemed too large a task for me to undertake. Furthermore, to hire a part-time or full-time developer to help in realizing a web platform role-playing game on a student's budget seemed too much of an economic strain.

The next course of action for October in moving forward the development of my proposed project was to analyze and potentially apply Holacracy's framework to existing co-op games such as *Pandemic: Legacy*, *Dungeons & Dragons* and *Zombicide* (Guiton, R. et al., 2014). This approach, while effective in learning more about the necessary processes and approaches of Holacracy, quickly became too shoehorn-y and a bit overwhelming in regards to the seemingly necessary task of up-fronting all relevant functions, visual assets and elements of each existing game which ultimately might not be needed for the Holacracy role-playing version of the game.

When developing the Holacracy role-playing game, I wondered whether somebody had ventured into these waters before. Using the simple keyword of “game,” I decided to look up any such occurrences on the *Holacracy Community of Practice* forum. I found a thread called “Gamifying Glassfrog” (Wong, August 28, 2015) where a user wanted to open a discussion and “...see if any organizations have been successful in using gamification in any other ways to

wanting to chime in with my current development at the time. I added my voice to the thread on October 6 stating my focus of research and referencing sources of inspiration in co-operative games such as *Dungeons & Dragons* v.3.5 (Cook et al., 2003) and *Pandemic: Legacy* (Leacock and Daviau, 2015) as being game systems that I saw having correlations to Holacracy. I covered the issues and observations I had made up until that point, specifically that in order for a beginner practitioners stewarding roles to sense actual tensions they need to experience operational work in order for these to surface naturally. Moreover, I mentioned the struggles I had been facing when experimenting and applying Holacracy processes and terminology to existing co-operative games. Additionally, I referred to me and my reservations regarding me developing an introductory game to Holacracy without being a certified provider of Holacracy.

Three days later, Bowers replied that she personally is a fan of Holacracy, *Pandemic* and *Dungeons & Dragons*, and offered that during the longer *Hygean* simulations apparent in the five-day Holacracy Practitioner Trainings, operational “...‘work’ of sorts” (Bowers, October 9, 2016) is worked in so that tensions can arise. Bowers further observed possible reasons for the participant’s difficulties of stewarding the Facilitator’s role at the elicitation I ran as part of the *CFC* summer course, and offered potential solutions as well:

(Bowers, October 9, 2016)

Regarding the meeting exercise, I could imagine that it would be hard for a new Facilitator to stick to the rules and be “ruthless,” since that is somewhat counter cultural. I could imagine a scenario where they were given a script that might help, and have the basic rules of facilitation spelled out beforehand in a clear way (e.g. crosstalk is never allowed and must be cut off immediately). I’m thinking of board games where there’s effectively a role that guards something, like the banker in Monopoly or the person with the buzzer in Taboo. It is clear what your job is from the rules and that it is important to maintain those in gameplay no matter how silly it is to stand behind someone with a blue and pink buzzer. But, facilitation

is complex enough that you might have to be able to play the game a few times to get the rules. Maybe there's a buildup/tutorial game you could play that would help introduce those rules, similar to the buildup of rules in Pandemic Legacy.

A back-and-forth discussion between Bowers and myself continued where we exchanged ideas and potential solutions which resulted in her urging me to go for the from-scratch creation of an operational role-playing board game that introduces and contextualizes the utilization of Holacracy's processes and methods to non-practitioners. I mentioned that I was especially inspired by the methods of which both *Pandemic* and *Zombicide* apply in banding the players to work together against the game itself. For example, when players are battling outbreaks of diseases in *Pandemic* they are granted limited amount of actions or moves that they choose and combine from a pool of options, and when all players have taken their turns they reveal cards from decks and spread disease on account of the game itself. Likewise, in *Zombicide* – where players collaborate in ridding a post-apocalyptic world of hordes of zombies – when all players have used up their actions they reveal specific cards to see how many zombies are spawned to the game's spawn zones. Philosophically, I observed how it seems a necessity for co-operative games to realize an external *other* that players can work together against, and that I prefer *Pandemic's* more abstract approach as compared to the one of *Zombicide* or *Dungeons & Dragons* which methods are, arguably, inherently racist towards specific races that might be hastily deemed as monstrous. I theorized that in an organizational Holacracy context, the *other* might simply be day-to-day operational obstacles, difficulties and occurrences practitioners face in realizing their own and collective purpose.

This discussion of mine and Bowers led Brian Robertson – core founder and developer of Holacracy, and Bower's husband – to reach out to me personally and stating his appreciation of my gamification experimentations of Holacracy. Robertson added that – like Bowers – he is a regular *Dungeons & Dragons* and *Pandemic* player himself, and asked whether I would like to attend a five-



Figure 32 Overview of v.I.O setup with elements such as demo-cards, role character sheets, boards and more.

the rapid paper-prototype visualization of a Holacracy governance meeting game was during the CFC summer course, I decided to stay with that kind of process for a bit longer and sketch some ideas. There soon came the time, however, that I had an inkling to go back to try things out in tangible form. I would need to visualize somehow not only a governance meeting but include operational work and thus tactical meetings as well. Seeing how these two meeting processes influence one another in terms of tensions surfaced when doing operational work and then processed via governance changes, I wondered how else might these two meeting processes be related? It struck me that both are realized in time-specific intervals – the governance meeting usually is held once a month while a tactical meeting is held once a week – and Robertson (2015) claims that “...a leading cause of failed Holacracy implementations is simply not scheduling or holding the key required meetings” (p. 157). Thus, a sense of time needed to be created to visualize this scheduling necessity as well as to suggest any kind of game pace related to objectives of the game – whatever they might turn out to be.



Figure 33 Detail of Holacracy role-playing game v.1.0, tactical meeting which later would be dropped.

I tend to lean towards modular approaches when it comes to design so I devised four instances of a seven-day week to be connected together in forming a single month. Each Monday would be connected to an outside tactical meeting sub-space where players would traverse through the meeting rounds similarly to the previously made governance paper-prototype on the occasion the time-token would progress onto those particular days. The same was true for one single Wednesday which was connected to an inside governance meeting sub-space that laid out the rounds for that meeting sphere. Being heavily influenced by the visual cyclical aesthetics of Holacracy circles, these weeks and Holacracy meetings as board-pieces soon took on curved shapes. I further contemplated how I might include contextualized roles, their descriptions and relevant operational work to drive the game and its players to utilize the Holacracy processes. Arguably, co-operative games such as *Pandemic*, *Dungeons & Dragons* and *Zombicide* can be viewed as a form of Holacracy tactical meeting with all the games' artifacts and operations acting as accessible, visual management elements not unlike the ones filling the walls during the tactical meeting I observed in August 2016 at *Company A*.

For the November 2 critique I ended up creating the early stages of what would later become the final design output. Temporarily leaving out any specific operational game mechanics as of how to collectively win or lose, I needed to initially ground this introduction to Holacracy using a single context. The game would be played by four individuals stewarding two roles each – where two of these roles were the Facilitator and Secretary roles – at a fictional publication firm. Unsure of the organization’s purpose due to current lack of game mechanics, I decided on a placeholder purpose of simply “publishing books.” I would later realize during the Holacracy Practitioner Training that “publishing books” is more akin to a project and a Holacracy purpose should take the form of a much loftier, inspirational goal to strive for. Thus, the overarching purpose of the fictional organization would later materialize as “to introduce to the



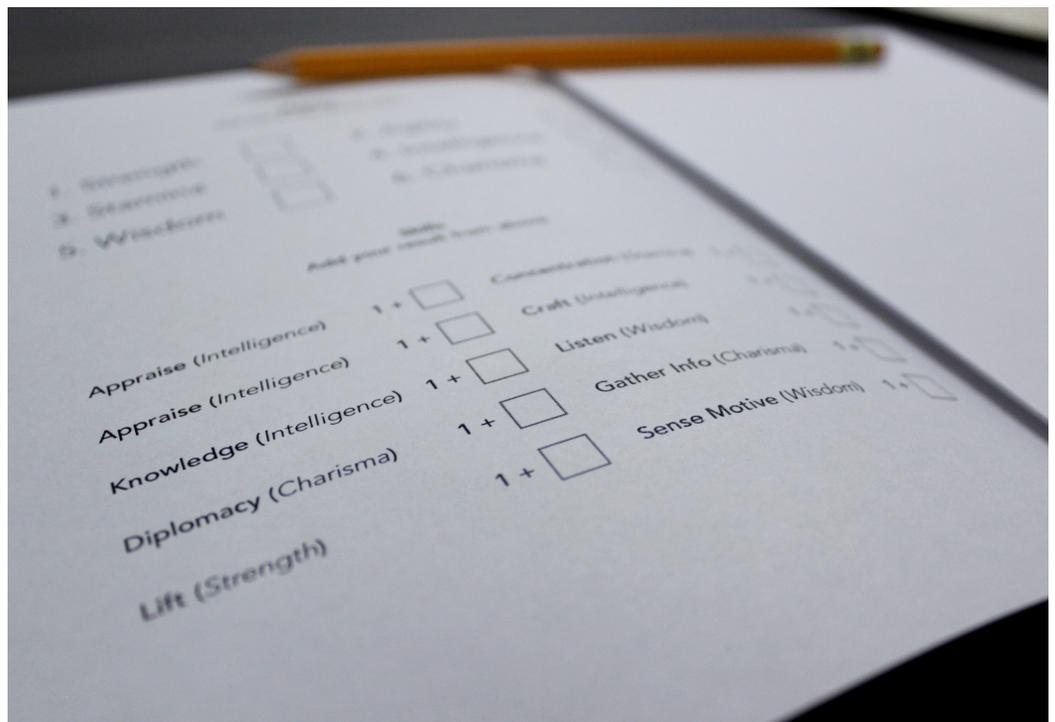
Figure 34 Close-up of early “Facilitator” and “Visual Design” roles.

world the works of new, aspiring Authors.” Referencing *Dungeons & Dragons*’ character sheets, where players create and maintain their fantasy characters and their skills by combining dice rolls and creative storytelling, I developed a character sheet for each player. Prior to starting the game, each player would name their character and roll for initial skill levels that potentially would affect any operational game mechanics realized in a subsequent version. While I had

envisioned potential implementations of whatever operational work would later drive the game (e.g., projects, next-actions, checklists), these character sheets were deliberately kept fuzzy and open-ended as I hoped for specific feedback from actual Holacracy practitioners when bringing the prototype with me to San Francisco a few days later. What I did remember, however, was that as a co-operative game its players would need an *other* of some sorts to face and overcome together. For this iteration, I included the addition of creative storytelling through particular event cards which were to be revealed at the start of each day and would affect gameplay and operational work in one way or another (e.g., “Power Outage – The power is out and you need to make due with non-electrical equipment for two days”).

I assembled an initial form of governance records collected in a folder that players could refer to when doing operational activities and when working on the fictional organization’s governance. Intentionally, I decided to leave out all role descriptions except for the ones of Facilitator and Secretary which referred directly to the Holacracy constitution’s descriptions of them. I wanted to receive feedback on this particular element from the Holacracy practitioners I would meet in San Francisco. I also included a Facilitator’s guide that would help the

Figure 35 Close-up of one character sheet, inspired by similar ones found in *Dungeons & Dragons*.



individual stewarding that particular role when players were in governance or tactical meetings. The decision to laser-cut the proposed designs of weeks and interconnecting meetings board pieces, along with the time-token, out of 5mm thick Baltic plywood was initially suggested by Immony Men during *Thesis 2*. I am grateful for that particular push for trying out new materialization options. Lastly, I borrowed pawns from *Carcassonne* (Wrede, Klaus-Jürgen, 2000) to act as players' temporary meeting-pawns.

D.3 v.1.5 (November, 2016)

I brought with me the v.1.0 to HolacracyOne's Holacracy Practitioner Training workshop which was run at a medium-sized conference room at the Westin hotel close to the San Francisco airport. Each day started with reflections from the previous day, simulations of Holacracy governance and tactical meetings along with dynamic presentations by Robertson concerning the module of each day where he – along with the other Holacracy coaches attending – urged the approximately 50 attendees to raise questions as they surfaced. With a few exceptions, most of the attendees were in their first or second year of implementing Holacracy in their organizations. On the first day, Robertson had the room suggest praise for what conventional, top-down hierarchy structures have brought organizations so far. Among proposed acknowledgements were alignment of numerous people towards a shared direction, clarity of decision-making power, division of roles offering scalability, (patriarchal) familiarity since infancy and shared language between global businesses. Then, Robertson remarks that the traditional, predict-and-control organizational paradigm arguably reached its maturity point around the time when the telegraph was being invented. To illustrate his point, Robertson asked attendees: compared to today's amounts and speed of communication, how many messages via telegraph might a 1950s CEO have received on a daily basis? Individuals' answers, ranging somewhere between three and seven, were somewhat nervously chuckled forth in realizing that most of their current email inboxes receive close to hundred messages each day. Robertson observes the apparent demands

of post-industrial organizations which include rapid turnovers and strong communication via multiple, integrative methods. By contrasting the above to the number of requests and information received today via email, social media and numerous other channels we begin to realize that the static, top-down systems were not built for today's dynamic realities. Robertson asked attendees for further limitations they could think of concerning individuals living and operating in conventional autocratic structures. Among responses were generational difficulties of millennials entering the workplace, waterfall production methods risking siloing of diverse staff members, decreased longevity in jobs, only a single path for career growth (i.e., the corporate ladder), upper management being far removed from front-liners' knowledge, and the occasions where managers might pull rank in forcefully getting their ideas through which often results in frustrations and office politics for the managers are imposing actions for subordinates to take against their better knowledge.

Robertson explains that while methods such as Agile software development, value-based employee engagement, team-building exercises, design thinking and leadership development can alleviate the above mentioned issues in the short-term, they tend to dissolve in the long-term as mere bolt-on solutions as they are situated in a system structured around vertical, top-down decision-making. This observation harkens back to Senge's *compensating feedback* within systems-thinking and how powerful it can be to focus on rethinking the systemic structure as opposed to merely reacting to events or analyzing various patterns of behavior. Thus, Robertson claims, Holacracy is not a bolt-on solution and organizations need to adopt it wholesale for the method replaces the fundamental structures of traditional decision-making hierarchies. It is impossible to do only parts of Holacracy because the fundamental power is not stored with an individual but the Holacracy constitution; a transparent *rules of the game* that everybody follows. In the long run, the shift of authority simultaneously frees former managers of having to solve everyone's problems and grants people at the front lines the authority and responsibility to use their applied and relevant knowledge to address any relative issues without

seeking buy-in or permission. This, Robertson claims, is the primary reason why implementing Holacracy – particularly in the beginning – is so hard for new practitioners. In order to learn and practice the processes and methods of Holacracy, some serious unlearning of rooted parent-child dynamics is ahead. Unlearning – the act of surfacing implicit *mental models* in combating *entrained thinking* – can often prove much harder to practice than learning. This key observation made clear to the attendees the primary purpose of this particular workshop: to make them Holacracy beginners. Indeed, to become a master of a discipline such as yoga or martial arts the adage of “practice makes perfect” rings also true for the practice of Holacracy.

During the five-day workshop, the simulations of the tactical and governance meetings were incredibly insightful as these were participatory elicitations created for attendees to steward roles at a fictional healthcare organization called *Hygean*. HolacracyOne had people mentally and physically engage in role-playing where they responded to operational and governance issues surfaced from taking next-actions and developing projects. Not unlike how in *Dungeons & Dragons* a game master plays the role of the world by structuring a story and creating challenges for fellowships to face, Robertson was situated in the middle of the room where he played the role of the world *outside Hygean* in sending requests, revealing events and responding to the roles’ work. This meant that any operational outputs created by individuals in *Hygean’s* roles (e.g., trainings, invoices, advertisements, venue scheduling) went to a specific outbox located at Robertson’s table which he used to respond to by placing information in an inbox which each group had to source from. These intensive operational sessions each lasted for 30 minutes or one month in the role-playing context. Governance and tactical meetings were run between the sessions for individuals to process any tensions they sensed while doing work in their respective roles. Participants took timed turns in stewarding the role of Facilitator which proved to be a very perceptive method to understand the counter-intuitive, neutral stance required to guard the meeting process over guarding people’s needs or feelings. By taking care of the process, the process will take care of the people –

Figure 36 Demonstration of the Holacracy RPG v.1.0 with workshop attendees and coaches. Credit: Eric Graham of HolacracyOne, 2016.

if they let it. To emphasize this notion, participants were asked at certain times to act out particular disruptive behavior that were documented on cards dealt in secret. This was not only done to test the Facilitator's efficiency of holding the meeting process sacred but also to highlight the reasons why the specific meeting structure allows for certain inputs only at particular times.

On the final day of the workshop, I used the opportunity of one final 30-minute reflection window to demonstrate for interested parties the v.1.0 of the developing Holacracy role-playing game I had brought with me to San Francisco. Recording the proceedings so as to capture participants' vocal feedback as well as their hands when demoing the design output, I gathered a lot of valuable insights and observations that I would later implement in a further version. An encouraging notion was when the attendees and



HolacracyOne's coaches showed a lot of interest and appreciation of the aesthetics and materialization of what had been realized for the game up until that point. To start the demonstration, I contextualized how the game is a co-operative game where players will be stewarding roles at a fictional publishing company in realizing their collective purpose. I further observed that the purpose I had thought of prior to coming to the Holacracy Practitioner workshop was simply to "publish books," but seeing that the purpose needs to be more of an unrealizable goal to motivate and inspire individuals in their roles, one practitioner suggested the publication company's purpose could be "to publish the most awesome books to the world." Indeed, that was a good enough purpose to go on. I voiced my doubts of the theme being too office-y and that perhaps the context should be more related to things like dragon slayers or ghosts. The majority said that Holacracy is complicated enough to begin with so a familiar context of conventional office space is helpful. I then asked four volunteers to semi-demo the four character sheets I had created as well as help me assemble the weeks and meeting board pieces. After reviewing the mostly empty governance records, I explained that for this version I deliberately left out specific game mechanics – other than the initial play-affecting event cards – in favor of more improvisational *Dungeons & Dragons* role-playing style in hopes of gaining particular insights and suggestions from attendees that have more hands-on experience with Holacracy.

Participants suggested that, similar to *Hygean's* approach of having initial role descriptions such as purpose or at least one accountability, certain grounding and familiarization of the enacted roles would need to be set from the start of gameplay. Moreover, in the case of event cards affecting to-be-formalized operational game mechanics, a few participants suggested that if similar event cards were to be revealed more than once throughout the game there might be a way to enforce changes to be created by roles in the governance records that would minimize events' effects were they to happen again. Robertson suggested, "...if there is an accountability [in place in governance records] then we got it covered. If you have an accountability [that matches the event] it

doesn't take a currency – it's just automatically solved" (Robertson, November 11, 2016). This particular observation I believed to be important to implement as a game mechanic as it correlates quite clearly to Holacracy practitioners' aim of continually improving the organizations' capacity by evolving their roles – a statement that Senge has illustrated as a necessity to create and maintain learning organizations.

As a reminder of how new practitioners of Holacracy can benefit from the round-based structural elements of governance and tactical meetings, Robertson asked if I had envisioned the proposed game to be an open-ended fictional role-playing game like *Dungeons & Dragons* with improvisational ad-hoc creative storytelling required of players. Or, might the game be realized more as an actor-move-based board game with predetermined artifacts and cards that inspire specific emergent play within those specific boundaries. I responded that I was open to both approaches which led Robertson to suggest that the latter might be more likely to reach a broader audience. In his words ...

(Robertson, November 11, 2016)

[O]ne of your key design questions is how much you want to go with a more open-ended role-playing game where the group is even making some of the outcomes that happen. [...] [I]n tactical meetings, you have next-actions as output. I wonder if you want to have action cards, or something, so that [the game is] not totally open-ended, and somehow channels it more into the game. [...] In a tactical meeting you get a turn, which is a tension to process. You can request an action, or you can choose or take an action card later that might matter somehow. [...] Structure [the game] more, so that it is less open-ended which means there is less to learn. It is more board game than role-playing game in that sense [...] which [puts] less on the players from being comfortable with the more creative storytelling. It's easier, it's more broadly accessible, but it's harder on the game design to figure all those mechanics out and tweak it. I think the latter will have a bigger audience than the former.

Robertson's observations on focusing on more structured game mechanics brought forth further suggestions of potentially including tangible and finite resources such as money, time and energy. All three of these operational resources are implemented in subsequent versions of the game. Some participants suggested incentives for processing predetermined tensions as cards or resources, but others – including myself – observed the difficulties we had in some of the workshop's previous simulations when trying to steward predetermined tensions as compared to actual tensions that surfaced when role-playing *Hygean's* operations and roles.

Participants suggested to consider that while the four week boards assemble as a single month of 28 days, how do the players win? How do you measure success in a potentially infinite, cyclical game that aims to continually improve players' capacity to face continued operations and obstacles? Similar to *Pandemic*, where players have linear visual cues that enforce the game's purpose of containing and eradicating the spread of disease (e.g., removing disease cubes from a world map, keeping an eye of a linear outbreak-status tracker which cannot reach a certain level for then the game is lost), the Holacracy role-playing game mechanics would need linear goals to achieve. Later on, these considerations would be reflected in the publication company's reputation tracker, number of authors published, numbers of projects needed to be completed for each author, and financial status. One final suggestion from Robertson is that he had observed that when Holacracy is being introduced to potential organizations, face-to-face simulations prove to be much more effective than virtual meetings via online videos or webinars. Robertson encouraged me to try and stay within a physical face-to-face focused encounter – à la Goffman (1961) – as opposed to doing a digital version as I had previously envisioned at the colloquium in September.

On my return to Toronto, I analyzed the feedback and insights from the Holacracy Practitioners Training and started to incorporate key observations for initial game mechanics. Reminding myself that all mechanics need to tie back into a co-operative game setting where players collaborate towards a

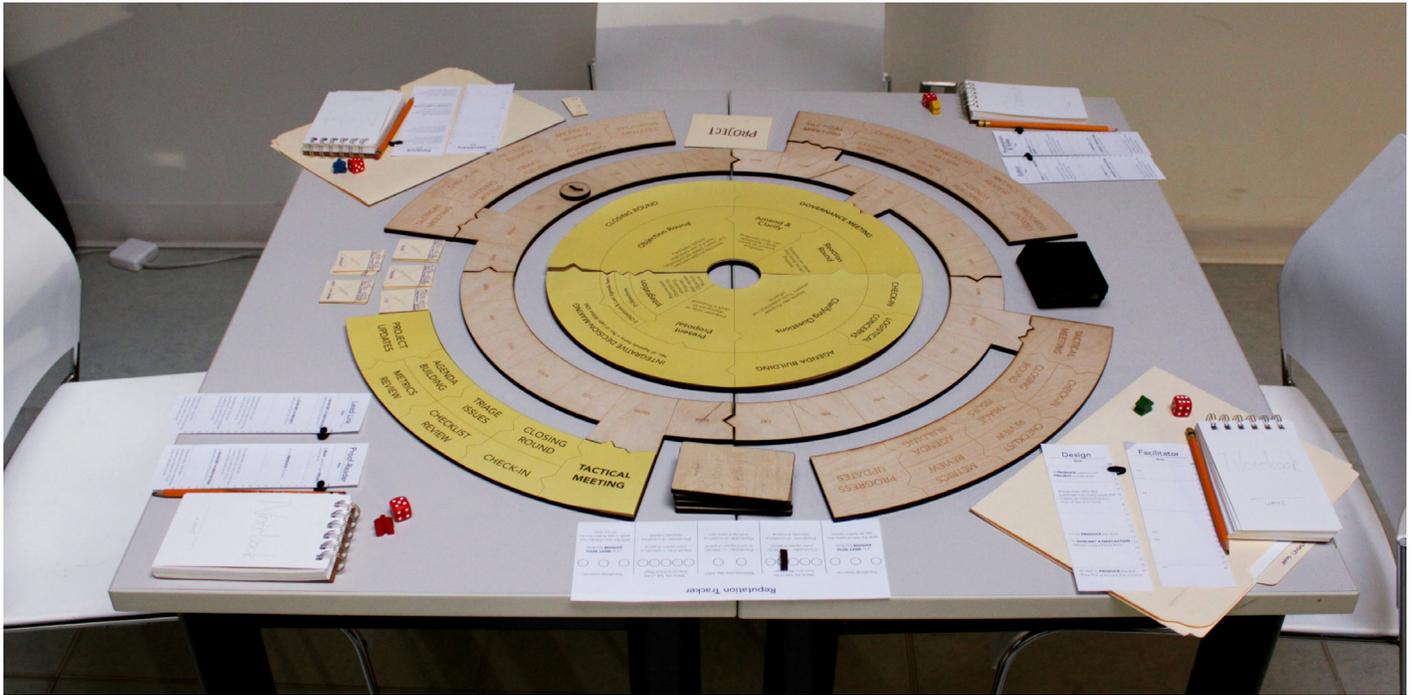
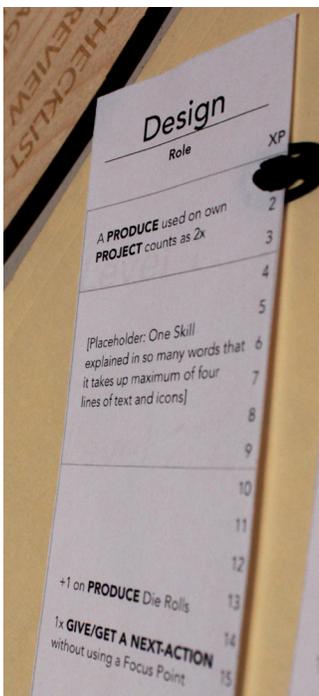


Figure 37 Overview of v.1.5 elements.

Figure 38 A v.1.5 role card with skills of each being granted when reaching certain levels of experience.



common goal, I created author cards where each required a minimum of six completed projects before a certain deadline to become published. Mimicking *Pandemic's* engaging feature of allowing players to name the diseases they eradicate from the game session, I devised the author cards to have empty lines on which players could create a proposed title for the author's work. Being inspired by the game mechanics of *7 Wonders Duel* (Bauza and Cathala, 2015) where players collect finite resource cards such as stone, clay, water and parchments in order to build larger constructions and sites of historical importance I noticed a similar correlation between the interconnected relationships of Holacracy next-actions and projects. To mimic the duty of transparency required of an autonomous, peer-to-peer collaborative working context all cards are placed in front of players face-up where each player could develop a total of three projects at once. Within the environment of a print publication company – where people in roles collaborate with authors to transform their initial scripts into tangible publications – I made a list of likely projects and relative next-actions that might emerge within such a context. At times it was difficult to break down such projects and next-actions as the process of publishing printed works is arguably linear and some projects might depend on the completed status of other related projects. Thus, I realized a

number of projects where some were stand-alone (parallel), others depended others to be completed first (sequential) and a third type which was more internally based and not related to publishing authors (e.g., “Monthly Rent Paid”).

Influenced by HolacracyOne’s workshop and the attendees’ suggestions of introducing energy points as turn-based resources, each player’s turn is made up of three *focus points* that they combine or repeat from a shared pool of actions. This is mirrored in *Pandemic / Zombicide* where each turn a player does a set number of actions: e.g., remove a disease cube / attempt to kill a zombie; move their pawn to another city / move their survivor to an adjacent room; trade a diseased city card / trade equipment with another survivor. For the design output, these moves were realized as focus points for players to draw or swap projects, or develop these by rolling for next-action cards. Taking a cue from board games that primarily operate from similar *worker placement* mechanics – i.e. “...mechanism [that] requires players to draft individual actions from a set that is available to all players” (Boardgamegeek Wiki, January 13, 2017) – the next-actions of “meet with author,” “read,” “fix,” “purchase” and “produce” would need to be generic enough to work across various projects while still relate to the game’s roles of Editor, Proofreader, Promotion, Design and Finance. I recalled *Hygean*’s interesting mechanism of including a finite amount of currency so I added in money cards which were to go with “purchase” next-actions. To add to the game a “will it come off?” sense of uncertainty and excitement (Huizinga, 1949, p. 47), I took a cue from *Zombicide* and *Dungeons & Dragons* where players would need to roll a die for next-actions to check for their success or failure for relevant projects. The level-up feature of roles from the previous v.i.o iteration was readdressed and borrowed ideas from *Zombicide* where each role gains additional skills at certain levels which can make addressing certain game mechanics easier. By rolling a die result of six when attempting next-actions, roles get a single experience point (xp) counting towards additional skills.

Referencing observations of the game’s current vague sense of linear progress – or lack of answers to questions like “how do we win or lose?” – I analyzed how such notions are addressed in co-operative board games like *Pandemic*, *Zombicide* and *Dead of Winter* (Gilmour and Vega, 2014). Often there is a basic, linear tracker which fundamentally guides players’ decisions throughout the game (e.g., in *Pandemic* no more than eight “disease outbreaks” are allowed, and

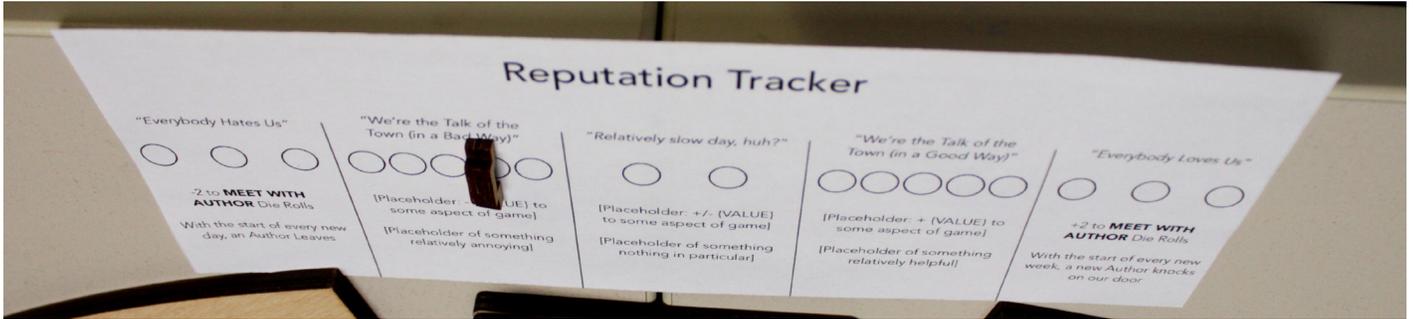


Figure 39 Early design of a reputation tracker to illustrate a linear sense of progress regarding winning or losing.

in *Dead of Winter* the “moral” of the community may not reach zero). To add richer complexity to the required decision-making, these games often break down further into contextualized sessions, missions or objectives with relative set-up and goals. Depending on the various nature of these criteria each session can take anywhere between 30 minutes, hours or days. Inspired by these design decisions, I introduced a reputation tracker for the publication company. Its mechanics are similar to the military-tracker of *7 Wonders Duel* where the opposing players receive added or diminished points based on the tracker’s position each turn. The reputation tracker is affected positively by players completing projects and publishing authors, and negatively by failed next-action attempts and missed deadlines. Depending on the tracker’s position it might make die rolls easier or harder, and add or take away additional authors. Were the tracker to move past the reputation markers in the negative zone the game would be immediately lost as the publication company’s reputation had suffered beyond repair. The same would be true if the organization went bankrupt or if players lost all authors. Were things reversed, however, and the tracker had no more space to move in the positive direction the game would immediately be won. Then, to condense the play session of the game, in the game’s rulebook would be a list of objectives or “strategies” that players would choose from

(e.g., a tutorial strategy to “Publish one Author within their deadline”). Lastly, I updated the event cards to have a few of them penalizing less or not at all if players’ roles had explicit accountabilities set in the governance records. This was to enforce players to see that with Holacracy processes they have added leverage to change the governance records in response to events that come up which, in turn, increases the organization’s capacity of dealing with such things were they to happen again. This feature hopefully starts a dialogue about the harmful effects of externalizing blame and instead see how “...systems thinking shows us that there is no separate ‘other’; that you and the someone else are part of a single system” (Senge, 2006, 15%, location 1284). With Holacracy pathways of governance meetings implemented at certain intervals of the game, players can address their issues without having to go to a boss or seek consensus – they just sense it when it happens and propose a change in the next governance meeting. All of these elements weaved together via rule-based game mechanics a system of reciprocal relationships where every element has a potential to affect one another.

D.4 v.2.0 (*December, 2016 – January, 2017*)

I received astute feedback from my advisor, Emma, regarding whether I could think of ways to better utilize the meeting board elements as they were quite large and only ever used on the relevant weekdays to which they were connected. In hinting at the role multiplicity apparent in Holacracy and post-industrial organizations I decided to have these particular board elements double-sided. The outside tactical meeting boards would have the same meeting structure on one side and a short game-mechanics reference on the other. The middle piece would have one side related to a governance meeting and the other would be an operational overview of the organization’s authors and their status as potential, current, lost or published, along with projects and finances with everything referencing the extensive data overview I witnessed when visiting the Holacracy-run *Company A*.

Figure 40 An example of players' meeting pawns being engaged in a governance meeting.



Figure 41 v.2.0 governance records as a booklet, notebook for players to note down tensions, "Starts-the-Day" token and meeting pawn along with two projects and two roles.

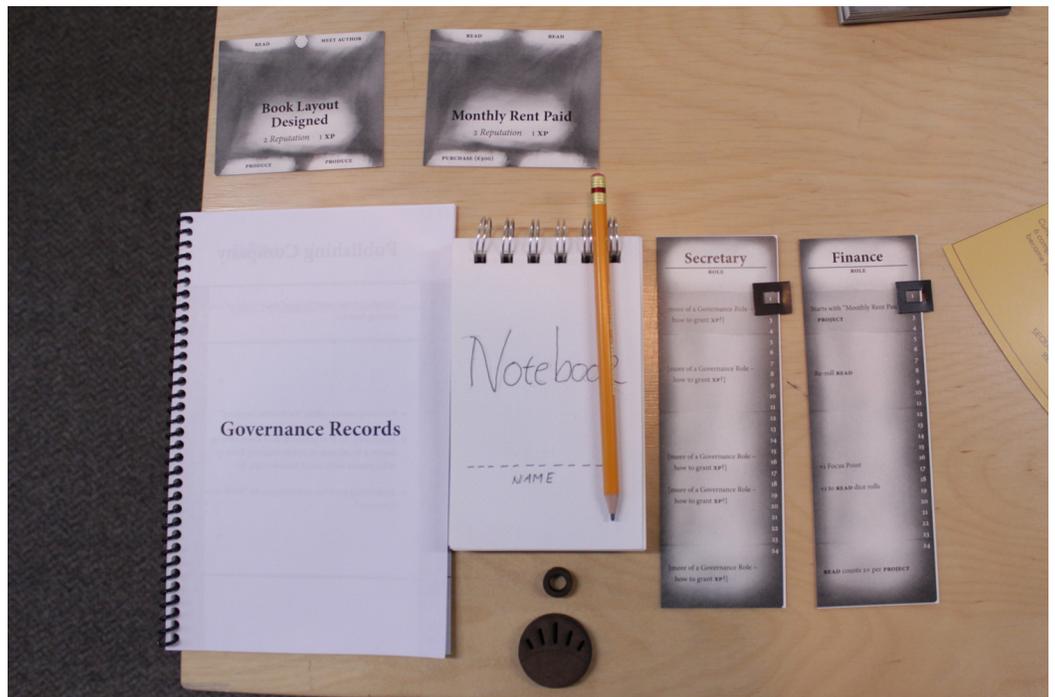


Figure 42 Next-action cards of "Produce," "Read," "Meet Author," "Purchase" and "Fix."



Some changes surfaced from me playing the game with myself at one point and then with my partner at another. I recognize the potential risk of including such insights as they might be affected by previously held relationships and thus it was important to have outsiders try these changes out in a subsequent version. Among main iterations were players could use their focus points to play next-actions not only for their own projects but also for other players, a token was developed to visualize which player starts each day by revealing an event and then using focus points, players mark with a pencil on projects to which author they relate to, fewer focus points were made available during weekends and the default deadlines for each author that signed up with the publication company were shortened from four weeks to two weeks. I sourced random gender-ambiguous names for the author cards using a website called BehindTheName (Campbell, 1996) and financial currencies were realized as euros (€) as I was hesitant and bias against using the too-familiar dollar (\$).

Late December, Brian Robertson and Alexia Bowers of HolacracyOne agreed to play-test and review the latest version of the game coming January. Working towards this goal, I sent them a copy of a paper-based execution of the v.2.0 game with laser cut tokens and a rulebook on January 19, 2017. I designed and illustrated temporary placeholders for the cards' design as to form initial sense of consistency around the overall design. My colleague Sara Gazzaz's designs of next-actions and proposed color palette would later influence the trajectory of the art design as well as the fictional company's branding. My primary concerns were to test if the play-testers could figure out how to play the game by only reading the rulebook and get feedback on what Holacracy-inspired elements I should focus on to make for a suitable introductory game.

D.5 v.2.5 (*February, 2017*)

The feedback I received from Robertson and Bowers was to simplify, simplify, simplify. There were too many moving parts and too many game-based terminologies such as focus points, parallel and sequential projects that was

difficult to learn while also learning about Holacracy roles, accountabilities, next-actions and projects. It was strange and confusing that players could roll for next-actions on others' projects as in Holacracy this is not exactly the case. Moreover, they noted that it would be good to keep projects like paying rent or other internal projects to the publication company as there is an interesting friction between roles facing authors and the roles that are more focused on "keeping the lights on." Robertson suggested removing the tactical meetings altogether and instead emphasize the relationship of roles, accountabilities and governance meetings as they are the "special sauce" of Holacracy to which novel practitioners seem to respond to. Robertson reiterated his notions from November that perhaps the game is still too open-ended to function as an introductory game and perhaps I could think of ways to make the governance records even more explicit somehow. They also recommended I figure out ways to simplify the board set-up as well as shorten the time required for playing the game. Not unlike the simplicity achieved by *Pandemic* in reducing different diseases to differently colored cubes, Bowers suggested simplifying next-actions cards as cubes as it might not only cut down on printing costs but also help understand the constructivist nature of seeing next-actions as building blocks for projects. She further offered that it was very engaging and rewarding to roll for next-actions on projects in order to raise the reputation status of the publication company. This last observation was especially helpful as I will admit that their extensive suggestions of cutting out hitherto carefully planned mechanics was a bit of a blow for my self esteem. However, it was also a maturing point of viewing such outside feedback as valuable integrations for further iterations. It also confirmed the Agile principles of favoring small, frequent iterations over working for extensive amounts of time on a master version usually from one's own assumptions.

Thus, I planned a February play-testing session with members of my cohort at OCAD where I would participate in the game's roles of Facilitator and Secretary, and observe the other players' interactions with an updated version of the game. Keeping in mind that for this particular session I valued feedback on the game

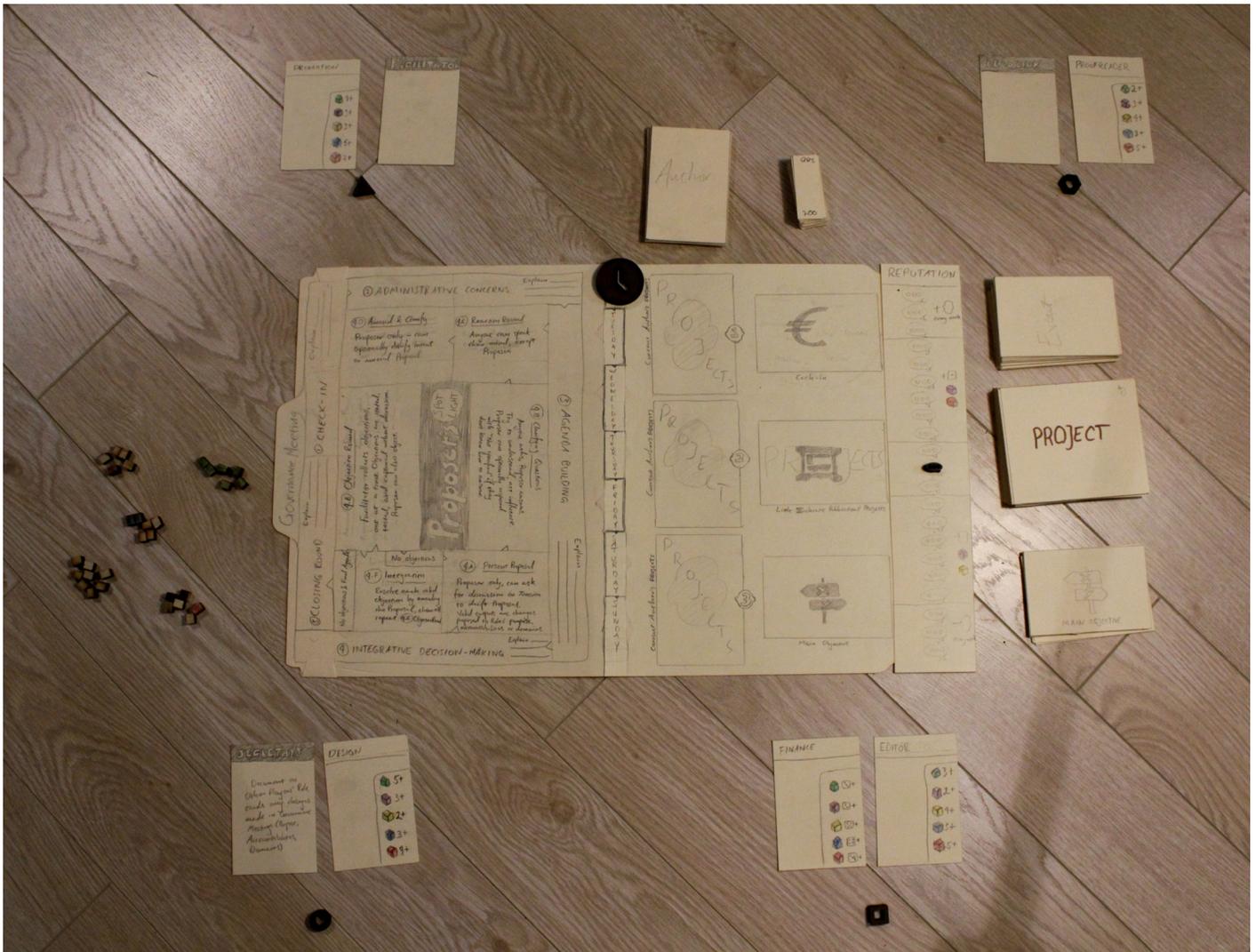


Figure 43 Rapidly created v.2.1, which would then be realized as v.2.5 soon thereafter.

mechanics over creating brand consistency in the art direction of the various elements. Therefore, cards like the projects and roles were updated as relatively simple wireframes with placeholder illustrations and the author cards hinted at where Sara Gazzaz was influencing the design direction. Moreover, as I named the hitherto nameless publication company as “Little Bookcase Publications” and developed a few logo ideas the game’s context started to take on a more tangible, immersive form.

A key iteration was to create three different sets of authors based on the type and number of projects they require to be completed before a set deadline. Completing all required projects for an author means their work is now published which rewards the publication company with relative funds and reputation points. To shorten the default time required to play the game, the

Figure 44 Play-testing setup of v.2.5 in February, 2017.

previous four weeks were cut down to a single week where governance meetings are held twice a week, tactical meetings are removed entirely and the double-sided feature of the boards is removed as well. Instead, the reciprocal nature of governance and operations is highlighted in the layout of the boards where they form an interlocking cyclical shape. The previously named *strategies* for each game session are copied from the rulebook and realized as visible-at-all-times objective cards placed on the operational side of the board. Projects are simplified as being just *projects* where each player can only develop a maximum of two projects at once, and needs to hand over any surplus projects to another role. Differently colored cubes represent the required next-actions players need to roll for in order to complete various projects. If a project's owner has a role with an explicit accountability related to the project that particular project





Figure 45 The various event cards proposed for v.2.5.

requires less of certain next-actions to be completed. Players' three moves each turn are not called focus points and can be used to combine various activities such as spend a move to roll for next-action on their own project, draw a new project or hand over / request a project with another player's consent. Removing the governance records in its current form – as well as the leveling-up feature of roles – the initial roles' accountabilities were put on the back of the role cards in an attempt to highlight their relative relationships. During the two governance meetings, individuals would then bring any tensions or ideas about added accountabilities to roles which would then be processed as changes via the meeting and documented on the role cards by the Secretary. Inspired by the co-operative board game *Dead of Winter* and its game-mechanics of distributing how easy or difficult it is for various characters to roll for successful actions, I devised the flip-side of the role cards to have various next-action stats related to their roles (e.g., the role of proofreader needs to roll for a relatively low number to consider a “read” next-action successful while a “purchase” next-action requires a higher die result of that particular role).

The approximately one-hour long play-testing session of v.2.5 revealed a few, important notions. First of all, figuring out a comprehensive order for the explanation of the game mechanics is vital as their interlocking, complex

potential that such an iteration might better gamify the governance meeting and tie it to the operational side. Along with other suggestions and insights offered were that if players have no spare room for projects they return them face-down on top of the project deck. During the single governance meeting we ran – for which I had devised a set timer of 10 minutes – I facilitated the process where players suggested changes to their own or others roles’ accountabilities. The process went relatively smoothly which might have confirmed previous observations of how helpful it can be to have an experienced Facilitator. After having played through a few additional game-days, players responded that they had gotten the hang of the game mechanics and that the same might also be true if we had run another governance meeting. Repeated play with these mechanics seems therefore to correspond to how Holacracy practitioners need continued involvement with the method and its processes in order to start trusting it and become confident in its ways. Thus, I set myself a grounded expectation for the subsequent version showcased during *Digital Futures* graduation exhibition. In the event of visitors signing up for a game session, I would need to emphasize that the game attempts to introduce Holacracy fundamentals via contextualized gameplay and repeated play helps in this endeavour.

Figure 47 A rough installation sketch for April’s exhibition with v.3.0 setup, along with projected video tutorial and a potential sign-up sheet.



Appendix E Copy of “Little Bookcase Publications” v.3.0
rulebook



Little Bookcase
Publications

RULEBOOK

INTRODUCTION & OVERVIEW



Little Bookcase Publications is a co-operative game for up to 4 players. Players act as partners who fill multiple Roles at a small-scale publishing company while being introduced to a peer-to-peer organizational system called *Holacracy*. Working together, these partners strive to collectively fulfill the *Little Bookcase Publications'* purpose of introducing to the world the printed works of aspiring *Authors*!

Every play session is guided by an objective card which sets up the game, a common goal partners need to collectively strive for and an estimated time required for play. For beginners, the "Easy Start" is meant as an approximately 15-minute tutorial.

When an objective is completed, the game is immediately won. However, depending on the company's Reputation status, finances and number of *Authors* signed on, the game can also end in various other ways. For example, were the Reputation token to be moved off its track to the right (+ sign) the game is immediately won. Were the Reputation token to be moved off its track to the left (- sign), the firm's Reputation is beyond repair and the game is immediately lost. If *Little Bookcase Publications* loses all their *Authors*, the game is lost.

When an objective has been chosen, players first give the potential publication a title by writing a proposed name on an *Author* card matching the selected objective card. Players then follow the rest of the instructions on the objective card to set-up the rest of the session.

Each partner gets 3 moves per day to use as they see fit to complete the required **PROJECT** cards stated on the outer rims of the *Author's* card before their deadline. Partners can ask for others' advice, but in the end the decision is theirs to make. These moves can be repeated or combined from a series of options. For example, to do a "Roll for a **NEXT-ACTION**" a player rolls a die for one **NEXT-ACTION** cube corresponding to a **PROJECT** they have in front of them. Before rolling, this player states from which of their Role cards they are doing this. Every Role has specific **NEXT-ACTION** capabilities that depict the minimum die result needed for a successful roll. If a Role has an Accountability card matching the **PROJECT** card being played for, then the **PROJECT** requires less of certain **NEXT-ACTION** cubes to be rolled for.

When all **PROJECTS** for a selected *Author* have been completed this *Author's* work is now published! *Little Bookcase Publications* receives the Reputation points and funds stated on the *Author's* card. Depending on the objective chosen, this might also win the game or count towards a win.



PARTNERS' TURNS

Gameplay follows the below sequence when the time token is on Monday, Wednesday, Friday, Saturday and Sunday. On Tuesday and Thursday, players first run a Governance meeting before going through the below steps.

1. Reveal Event

The partner who has the “Starts-the-Day” token reveals the day’s event card. Place it on the event space on the board and read the card out loud.

2. Address Event & First Turn

The starting partner addresses the event as they see fit – sometimes using one or more of their moves if the event requires. The starting partner then uses whatever remaining moves they have left of their daily 3 moves to finish their turn.

3. Next Partners’ Turns

The partner to the starting partner’s left uses their own 3 moves as they see fit. Repeat until every partner has used up their 3 daily moves for their turns.

4. Finish the Day

When every partner has used their 3 moves, the starting partner progresses the time token one day and hands the “Starts-the-Day” token to the partner to their left.

MOVES PER TURN

For every day, each partner gets a turn. A turn is made up of 3 moves. You can combine any of the moves listed below or repeat any several times with each time counting as 1 move. All partners can work on any kind of **PROJECT** as long as they are the **PROJECT**’s owner (i.e., the **PROJECT** card is in front of them). Partners have Accountability cards attached to their Roles and if these match certain **PROJECTS** of theirs it makes things easier. More Accountability cards are granted in Governance meetings on Tuesdays and Thursdays.

Draw a New PROJECT

Draw a **PROJECT** card from the **PROJECT** deck and place it face-up in front of you. Partners can have a maximum of 3 **PROJECTS**.

Hand Over or Request a PROJECT

Hand over to a willing partner a **PROJECT** of yours if you think they fill a Role which Accountability cards might fit better with the **PROJECT**. The same is true if you think that one of their **PROJECTS** might be better suited for one of your Accountabilities.

Discard a PROJECT

When there are no more **PROJECT** spaces available, return a surplus **PROJECT** to the bottom of its deck.

Roll for a NEXT-ACTION

Decide which **NEXT-ACTION** cube on one of your **PROJECTS** you want to roll a die for. Before rolling, state from which Role you are rolling. If the roll is equal to or higher than the selected role’s **NEXT-ACTION** capability, place one **NEXT-ACTION** cube of the chosen type on the **PROJECT**. This successful **NEXT-ACTION** now counts towards the **PROJECT**’s total required **NEXT-ACTIONS**. Any **NEXT-ACTION** die roll less than the minimum results in negative Reputation points. When rolling successfully for the last required **NEXT-ACTION** on a **PROJECT**, return the cubes and place the completed **PROJECT** underneath the *Author* to whom it relates. Add any Reputation points stated on the completed **PROJECT**.

FACILITATOR
 Using the rulebook to facilitate Governance meetings
 ACCOUNTABILITY

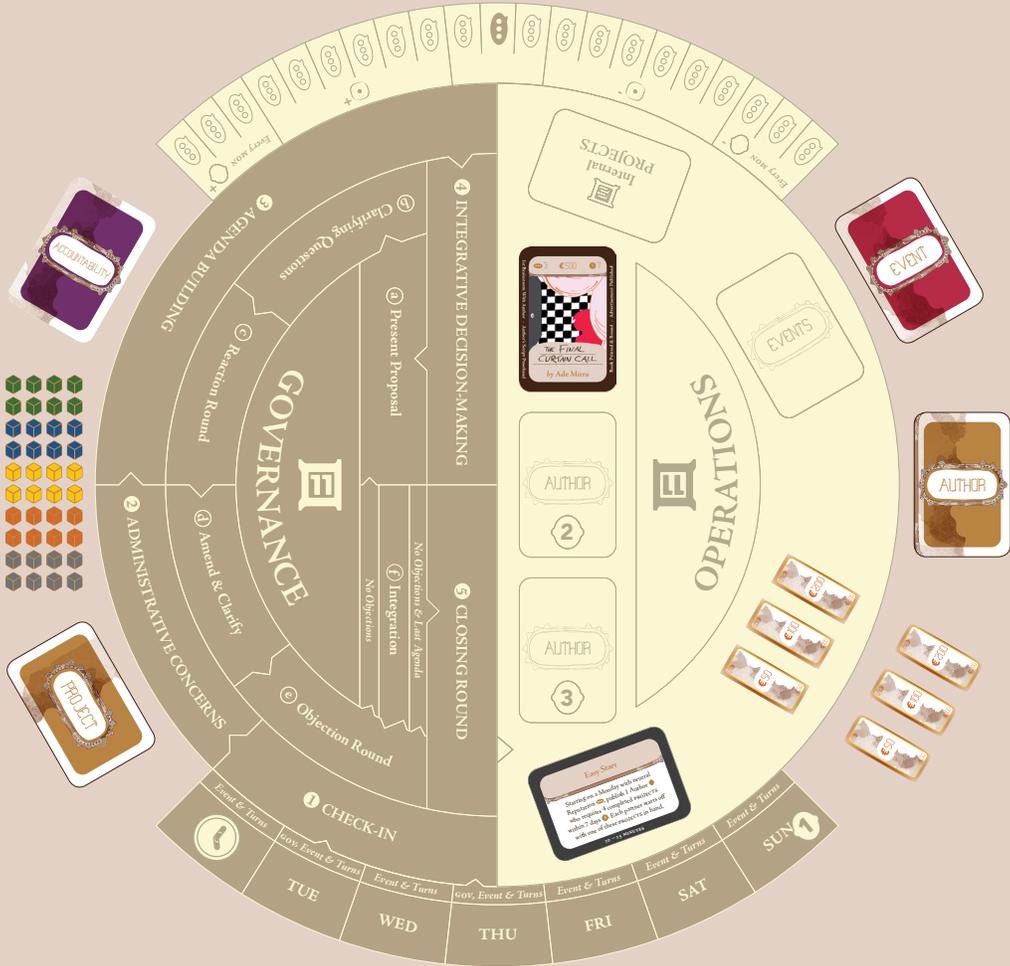
PROMOTION
 Publishing advertisements for our Authors' works
 ACCOUNTABILITY

DESIGN
 Preparing and sending our Authors' book designs to print
 ACCOUNTABILITY

MAINTENANCE
 Repairing electricity-related malfunctions
 ACCOUNTABILITY

Advertisement Published
 Using Book Tokens as Accountability

Book Printed & Bound
 Using Book Tokens as Accountability



Let's Brainstorm With Author
 Using Book Tokens as Accountability

Author's Script Proofread
 Using Book Tokens as Accountability

SECRETARY
 Capturing proposals and objections in Governance meetings
 ACCOUNTABILITY

EDITOR
 Brainstorming with our Authors on creative directions
 ACCOUNTABILITY

FINANCE
 Paying outstanding bills
 ACCOUNTABILITY

PROOFREADER
 Proofreading our Authors' scripts
 ACCOUNTABILITY



SETUP

- 1 Arrange the Governance and Operations board pieces as shown. Each partner gets one of the 4 meeting pawns to be used in Governance meetings on Tuesdays and Thursdays.
- 2 Choose an objective card to play for. Place this card on the objective space on the Operations board.
- 3 Place the Reputation token on a space on the Reputation track matching the chosen objective. Do the same with the time token on the time track.
- 4 Find an *Author* that matches the chosen objective card. Shuffle the rest of the *Authors* deck and place it as shown outside of the Operations board. Give the chosen *Author's* potential publication a name by writing it on the card. Place the *Author* on the *Author* space marked with "1" and then place this *Author's* deadline token on a day corresponding to the number of days given on the *Author* card counting from – and including – the starting day.
- 5 Randomly deal out the 8 Role cards so each partner fills 2 roles. The partner filling the *Facilitator* role uses the rulebook during Governance meetings. The partner filling the *Secretary* Role stewards the Governance meeting note sheet. A single partner cannot fill both *Facilitator* and *Secretary* roles.
- 6 Find the Accountability cards each Role starts with and deal these to the corresponding Roles. Shuffle the rest and place the deck as shown outside of the Governance board.
- 7 Randomly deal each partner a single **PROJECT** card. Place the deck as shown outside of the Governance board along with the the **NEXT-ACTION** cubes.
- 8 Shuffle the event cards and place the deck as shown outside of the Operations board.
- 9 Count €1,000 and place these starting funds on the marked space on the Operations board. The rest goes outside of the Operations board as shown.
- 10 Review your Roles, Accountabilities and initial **PROJECTS**. Depending on the *Author's* required **PROJECTS**, decide who begins the game by being the first to hold the "Starts-the-Day" token. Start!



LIST OF CARDS & TOKENS

Authors

Your collective purpose is to publish works of aspiring *Authors*. Each *Author* might require 4, 5 or 6 completed **PROJECTS** before their set deadline to have their work successfully published. When this happens, *Little Bookcase Publications* receives the *Author's* funds as well as Reputation points. In the case of missed deadlines, the affected *Authors* are lost and their cards are removed from the game. Also, the Reputation points are deducted instead of rewarded.



PROJECTS and NEXT-ACTIONS

Partners work on relevant **PROJECTS** that need to be completed for specific *Authors*. Each partner can have in front of them a maximum of 3 **PROJECTS**. A partner works on their own **PROJECT** by rolling a die for one of the **NEXT-ACTION** cubes stated on said **PROJECT**. **NEXT-ACTIONS** are **READ** (green cube), **MEET AUTHOR** (blue cube), **PRODUCE** (yellow cube), **FIX** (purple cube) and **PURCHASE** (orange cube) (which requires spending of finances when successful). Before rolling, a partner first states from which of their 2 Roles they are rolling as. If the die result is equal to or higher than the **NEXT-ACTION** capability selected on the Role card, the **NEXT-ACTION** is successful and its representative cube is placed on the relevant **PROJECT** card thus counting towards its completion. When rolling less than needed, *Little Bookcase Publications* suffers one negative Reputation point. When rolling successfully for a **PROJECT's** last **NEXT-ACTION**, the **NEXT-ACTION** cubes are returned, Reputation points are awarded and the completed **PROJECT** is placed underneath the *Author* card to which it relates. This completed **PROJECT** now counts towards the *Author's* potential publication.



Roles and Accountabilities

At the start of every game each partner gets 2 Role cards. A single partner cannot fill both *Facilitator* and *Secretary* at once. Every Role starts with a particular Accountability card (see below) and each Role cannot have more than 4 Accountability cards attached. Further Accountability cards are granted in Tuesday's and Thursday's Governance meetings.



Events

An event card is revealed each day by the player who has the “Starts-the-Day” token. These can affect the firm’s Reputation, Authors or finances as well as impact partners’ moves for the day.

Funds

By default, *Little Bookcase Publications* starts with €1,000 in funds. Further funds are granted when all of Author’s **PROJECTS** are completed or when an event grants such rewards. Spending funds is required for specific **PROJECTS** and events when rolling for **PURCHASE**.

Objectives

A common goal confining specific play sessions and sets up the game. The card acts as a helpful guide to align partners when deciding how to spend their daily moves. For a list of objective cards, see later pages.

Reputation

The Reputation tracker is affected negatively by certain events, Author’s missed deadlines and failed **NEXT-ACTION** die rolls. In turn, at certain points the status of the Reputation can affect die rolls and Authors either positively or negatively. If the Reputation token has no more space to move to the negative side of the tracker the game is immediately lost. If the token runs out of room on the other side then the game is won.

Meeting Pawns

Each partner gets one of the 4 available meeting pawns to be used in Tuesday’s and Thursday’s Governance meetings. Partners use the pawns to traverse the meeting rounds in accordance with the facilitation of the partner filling the *Facilitator* Role.

“Starts-the-Day” Token and Time Token

Each day the partner with the “Starts-the-Day” token is the one who first reveals the event card for the day and then uses their 3 moves of the day – first addressing the event if it so requires. When all partners have used their 3 moves, the time token is progressed one day forwards and the partner to the starting partner’s left receives the “Starts-the-Day” token.



GOVERNANCE MEETING

On Tuesdays and Thursdays, partners move their meeting pawns to the Governance board in order to create proposals of what Roles receive additional Accountability cards. The partner filling the *Facilitator* Role uses the following instructions to facilitate a Governance meeting. Each round of the process describes certain interactions which are not meant for other rounds. Therefore, the *Facilitator* stops any out-of-turn interactions immediately and redirects the attention back to the process. It helps to read each step of the guide out loud as you go along to highlight what can be expected at each step of the process. For each round of the meeting, partners move their meeting pawns in accordance to that specific round. The partner filling the *Secretary* Role documents agenda items, proposals and objections in the appropriate rounds.

1 *Check-in*

One at a time, everyone is free to call out any distractions and get present for the meeting – without discussion or crosstalk.

2 *Administrative Concerns*

Facilitator sets a timer for 10 – 15 minutes, depending on how much time players have and their experience with the game.

3 *Agenda Building*

Each partner draws one Accountability card and then captures that card as a 1 – 2 words placeholder agenda items for the *Secretary* to note down.

4 *Integrative Decision-Making*

As long as the timer allows, partners take turns in going through the inner cycle for each agenda item captured. Whoever goes first places their meeting pawn in the middle of the Governance board while the others encircle them by traversing the sub-rounds documented on the opposite page.

5 *Closing Round*

When all agenda items have been processed – or the timer has run out – one partner at a time shares a reflection of the past meeting to improve the next one. Return any unassigned Accountability cards to top of their deck.



It helps when the *Facilitator* reads each step of the guide out loud as you go along to highlight what can be expected at each step of the process. For each round of the meeting, partners move their meeting pawns in accordance to that specific round. The partner filling the *Secretary* Role documents agenda items, proposals and objections as they surface.

4a *Present Proposal*

Proposer only, no discussion. The Proposer makes a proposal to which Role their drawn Accountability card should go to. The *Secretary* documents the proposal for all to see.

4b *Clarifying Questions*

Anyone asks the Proposer to better understand the proposal and the Proposer answers, or can optionally respond with “Not yet specified.” When asking the Proposer, try to understand and not influence with opinions or suggestions – that is the purpose of the next round.

4c *Reaction Round*

One at a time and without discussion, anyone can speak their mind about the proposal – except the Proposer. Anything ranging from an emotional outburst to an intellectual critique is allowed.

4d *Amend & Clarify*

The Proposer is the only one who speaks. They can optionally clarify the intent of their proposal, or amend it based on the reactions if they wish. *Facilitator* should urge the Proposer to be selfish, and not feel peer-pressured.

4e *Objection Round*

One at a time and without discussion, the *Facilitator* asks each partner the following question, word for word: “Do you see any reason why adopting this proposal would cause harm or move *Little Bookcase Publications* backwards? Objection or no objection?” If there are no objections, the proposal is adopted and the affected partner receives the Accountability card in question. We move to the next agenda item with a new Proposer. However, if a partner does see a reason the proposal causes harm, they exclaim “Objection!” and state their objection which the *Secretary* captures for all to see. Remember, only one partner speaks at a time. When all partners have answered whether they want to raise an objection, the *Facilitator* tests each objection captured one at a time by using a series of either-or questions located on the next page – before going to 4f. *Integration*.

4f *Integration*

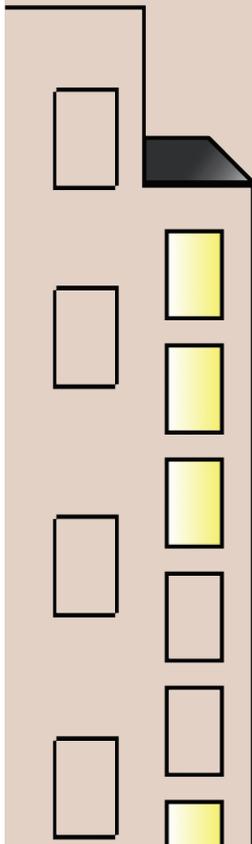
The *Facilitator* facilitates a discussion to help integrate the valid objections by amending the proposal for each one. The discussion stops as soon as the objector and the Proposer have both agreed that an amended proposal would not cause an objection while still addressing the proposer’s proposal. Once all objections are integrated, repeat 4e. *Objection Round*.



OBJECTION VALIDATION (AS PART OF GOVERNANCE MEETING)

The partner who fills the *Facilitator* Role asks those who objected in the 4e. *Objection* round the either-or questions opposite. For example, the first question is read as follows: “Is your concern a reason the proposal causes harm **OR** is your concern the proposal is unneeded?” The moment an objection does not pass a test, the *Facilitator* says the following: “What you have just told me is that your objection is invalid.” Turn to the next objection and repeat.

However, when the *Facilitator* believes an objection has passed all questions these are then used for the 4f. *Integration* round. It is important for all partners to recognize that the *Facilitator* is not assuming the stance of an “objection-prevention-police”. They are instead to act more like a curious scientist who is testing whether an experiment meets certain criteria.



Question Nº 1

Is your concern a reason the proposal causes harm ...

_____ OR _____

... Is your concern the proposal is unneeded?

→ **✗**
INVALID
OBJECTION

Question Nº 2 ←

Is your concern created by this proposal ...

_____ OR _____

... Is it already a concern, even if the proposal were dropped?

✗
INVALID
OBJECTION

Question Nº 3 ←

Do you know this impact will occur ...

_____ OR _____

... Are you anticipating this impact is likely to occur?

→ Question Nº 4

Could significant harm happen before we
can adapt to the proposal ...

_____ OR _____

... Is the proposal safe enough to try, knowing we can revisit it?

✗
INVALID
OBJECTION

→ Question Nº 5

Would the proposal limit one of your Roles ...

_____ OR _____

... Are you trying to help another Role or
Little Bookcase Publications in general?

↓
✓
VALID
OBJECTION

→ **✗**
INVALID
OBJECTION

CREDITS & DISCLAIMER

Game Concept and Design

Egill Rúnar Viðarsson

Illustrations and Additional Designs

Sara Gazzaz

Playtesters

Alexia Bowers, Brian Robertson, Egill's cohort members at OCAD University, Sunna Skúladóttir

The game of *Little Bookcase Publications* is based on a peer-to-peer organizational system *Holacracy*. The game-mechanics have been developed as a part of an MDes thesis project and its culmination attempts to introduce the method's fundamentals through customized gameplay to help with on-boarding. Therefore, this game is not meant to learn about the entire processes and artifacts of *Holacracy*, or replace any certified coaching or implementations of the method.

For those interested in learning more about *Holacracy* and how to adopt the system for actual organizations, kindly reach out to certified *Holacracy* providers such as HolacracyOne, IGI Partners, Energized.org, and more.



SECRETARY'S NOTES

OBJECTIONS

(Captured in 4e. Objection Round)

SECRETARY'S NOTES

AGENDA ITEMS

(Captured in 3. Agenda Building)

PROPOSALS

(Captured in 4a. Present Proposal)

Appendix F An Overview Video of “Little Bookcase Publications” v.3.0

Please follow the below URL to watch on *YouTube* a four-minute overview video explaining “Little Bookcase Publications” v.3.0 game-mechanics:

<https://youtu.be/HSSnLASraqc>

Appendix G Research Ethics Board Approval for Interview and Non-participant Observation at *Company A*

The *rapid ethnographic* research methods used to gather primary qualitative data when visiting the Holacracy-run *Company A* in August 2016 were proposed before, and then approved by, *The Research Ethics Board*. The approved REB application (Nº 2016-45) is dated August 17, 2016, and is valid for one year less a day, or until August 16, 2017.

