

# Organizational diagram software for sociocratic circle collaboration - Report

Software for SoFA Helping Circle

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## 1 Introduction

The Software for SoFA Helping Circle is a sub-circle of IT Circle with the aim to test, evaluate, and report on the benefit of software tools for Sociocracy For All's (SoFA) circle collaboration. The circle members during the development of this report were John Clark, Nathalie Szycher, and Kåre Wangel; they held their first meeting in October 2022. John and Nathalie were the linking members to IT Circle during this time.

This report provides an overview of the circle's work. The circle decided early on to focus on organizational diagram software, as they identified this as the area currently experiencing the most tension in SoFA.

## 2 Understand: why are we surveying organizational diagram software?

Based on our experience in SoFA and other organizations, our first step was to understand what problem we wanted to solve and how software can provide solutions. Our initial discussion was not about focusing on specific software, but rather identifying general features and feature requests that could improve

the practice of sociocracy within SoFA. This conversation lead to four areas for these features.

The first one is improving the work of log keeping and secretary work within SoFA. This includes a visual display of the circle structure and an accessible list of members and roles. We are also interested in keeping track of policy terms and providing members with notifications around upcoming decision points (e.g. role selections) in order to support the circle’s work. Members could have personal backlogs. Software solutions could support locating policies and also keeping a history of roles and policies.

Secondly, software could support maintaining sociocratic structure around meetings and agendas, e.g. automatically computing the timing of agenda items and suggesting upcoming backlog items, as well as providing collaborative and real-time editing.

The third area is software that supports consent decision making, including features such as rigorous attribution of decision logs. Lastly, we identified a few general software requirements, which include: the possibility to integrate tools in order to reduce the overall number of tools that we use, being user-friendly, supporting the onboarding of new members, and the ability to customize the software and collaborate with developers.

Category	Related subcategories
Circle Structure	Visualization of circle roles Navigation of organizational information Aims and domains
Document storage	Meeting minutes Policies Collaborative editing
Task management	Backlog Action Items Assignment to roles, circle members Integration with meeting
Sociocratic workflow	Proposal making Decision making Facilitation support
Communication	Videoconferencing Written Communication Feedback
Coordination	Calendar Scheduling
Platform function	Integration of tools

Table 1: Categories of software

With all these different directions for considering software and possible features, Table 1 is an attempt to identify the different categories of software. The categories and their subcategories refer to features that in some way every organization needs to cover. The Content Department of SoFA is working on this topic in depth, looking at organizational needs and mapping which software is fulfilling these needs (see <https://forums.sociocracyforall.org/t/it-t>

ools-for-sociocracy-please-add/2500/). Coming from a software perspective, many products focus on one main category. There are some examples which have features spread out around several categories, aiming for an all-in-one tool. This way of categorizing the tools provides one way of thinking about them, but there is often some overlap and an organization needs to find their right suite of products. In the Helping Circle we decided to look at software that is focused on organizational circle structure.

SoFA uses a mix of different software products as shown in Table 2. SoFA is currently using Kumu to visualize their circle structure. In Kumu one sees the different circles and their links, the circle’s aims and domains, circle members and circle role holders. Operational role holders are currently not shown. Additionally, the header of each circle’s minutes document also shows their aim, domain, circle members and roles. Operational role descriptions are stored in a separate Google Doc. Each circle can have an associated email which is configured through Google Groups. There is an ongoing transition to consistently store policies and role information on Discourse (a forum tool). Finally, additional membership information (type of membership, review) is stored in GroundHogg and each member has a profile page on the website (WordPress).

Category	Software in SoFA
Circle Structure	Google Drive, Google Groups, Discourse, Groundhogg, Kumu + local database, WordPress
Document storage	Discourse, Google Drive
Task management	Google Drive, Asana, Clickup
Sociocratic workflow	Templates in Google Drive
Communication	Zoom, Gmail, Google forms, personal email, Slack, Discourse, other
Coordination	Google Calendar, YouCanBookMe, LettuceMeet Doodle, WhenIsGood
Platform function	Membership Dashboard on WordPress website

Table 2: Different software used in SoFA

### 3 Explore: what options did we consider?

In the category of software for circle structure, Table 3 provides an overview of the software options that the Helping Circle investigated. SoFA uses a non-nested, branching view to display the circle structure. The table shows basic information around the software product (company, price), whether a piece of software provides that type of branching view, and whether it is open-source. Only Peerdom and Kumu provide the wanted display of circles. Circleweaver and Maptio are the only software projects which are available open-source. Circleweaver was released as open-source<sup>1</sup>, but no further information can be found. Maptio has a repository on GitHub<sup>2</sup>.

<sup>1</sup><https://s06.circleweaver.com/about.html11.08.2023>

<sup>2</sup><https://github.com/Maptio>

The list is not exhaustive. Among software that the Helping Circle did not look into detail are: weco.io, Hylo, karrot.world, Sutra.co, shala.us, fractale.co and other graphical tools.

Name	branching view	Organization	Pricing per month	Open-source
Circleweaver	limited	MeetingWeaver Tech LLC	basic level free	yes
Glassfrog	no	GlassFrog LLC	Free plan 0\$ Premium 6\$/user	no
Maptio	no	Maptio Ltd.	\$10 - \$150	yes
Peerdom	yes	Peerdom AG	5\$/user, free seats, discount	no
Holaspirit	no	Talkspirit (joint-stock)	from 59€ 20 user from 79€ 100 user	no
Kumu	yes	Kumu Inc.	free public projects	no
Nestr.io	no	Nestr BV	personal 0\$ team 4\$/user	no

Table 3: Software explored by the Helping Circle

### 3.1 Kumu

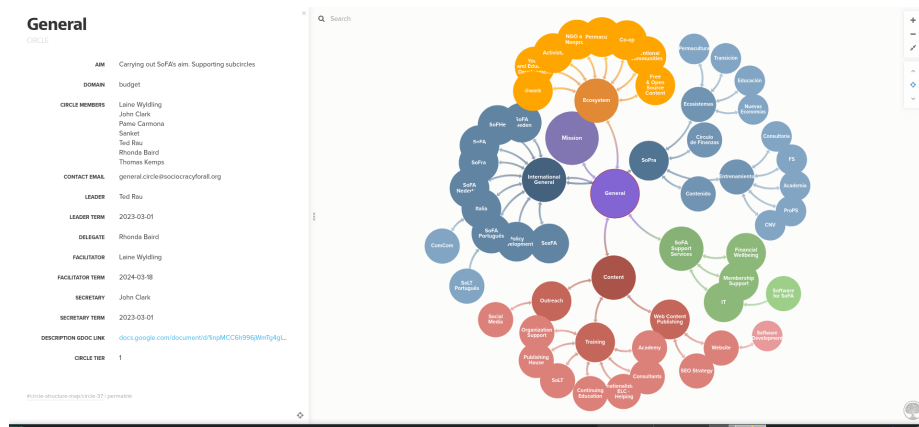


Figure 1: Screenshot of a sociocratic circle structure displayed in Kumu

SoFA’s circle structure is currently displayed using Kumu (see Figure 1). Kumu (<https://kumu.io/>) is a tool to display relationships between data points with a powerful configuration of information display. It features easy embedding of resulting diagrams. A small team interested in social change is working on Kumu. Although it is not open-source the team published a manifesto<sup>3</sup> which informs about the team’s values. The core function of the

<sup>3</sup><https://kumu.io/manifesto>

software is data visualization.

### 3.2 Peerdom

Peerdom's (<https://about.peerdom.org/>) main feature is an easy navigation of the organization, roles and circles (see Figure 2). The user can choose between multiple organization views, including a branching view. Roles can be displayed nested within the circles or non-nested with links to the circle. The software provides member information and a directory to see which roles a person is holding (see Figure 3). Additional add-ons can be added for advanced analysis of the organization or adding extra information (mission, projects). The display of an organization can be shared publicly.

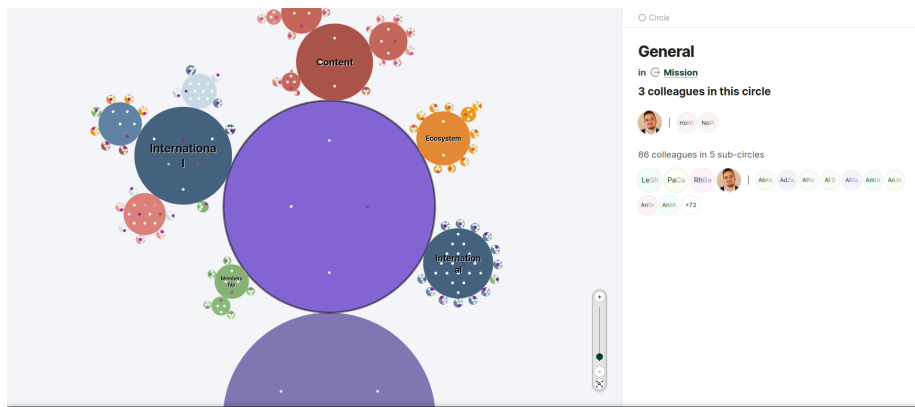


Figure 2: Screenshot of a circle structure displayed in Peerdom



Figure 3: Screenshot of a profile view in Peerdom

### 3.3 Maptio

Maptio (<https://www.maptio.com/>) is a tool for organizational mapping. It mainly features a nested view of circles, which can be shared publicly (see Figure 4). The team is aware of the need for different views, but that is not implemented yet<sup>4</sup>. A directory of people and roles (see Figure 5) is also available when being logged in. It stands out that the organization is very purpose-driven with the choices to be open-source and to have a flexible pricing policy embedded in an alternative economic model.

<sup>4</sup>open issue: <https://github.com/Maptio/maptio/issues/325>

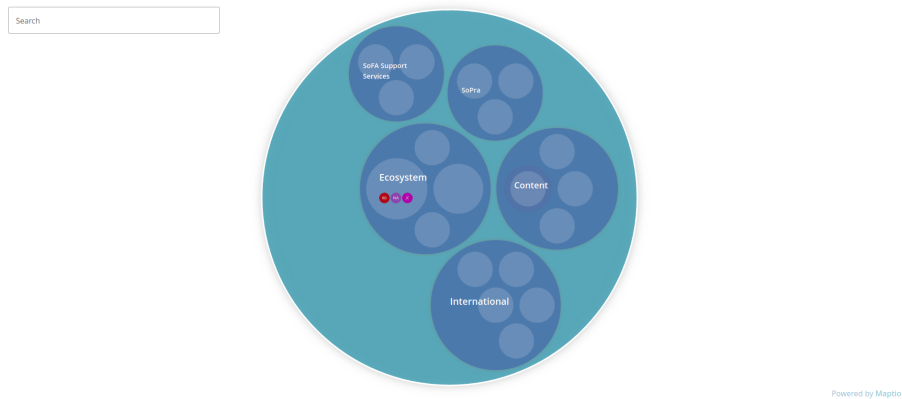


Figure 4: Screenshot of a sociocratic circle structure displayed in Maptio

Figure 5: Screenshot of a profile view in Maptio

### 3.4 Other

Circleweaver (<https://s06.circleweaver.com/>), Glassfrog (<https://www.glassfrog.com/>), Holaspirit (<https://www.holaspirit.com/>) and Nestr.io (<https://nestr.io/>) all provide advanced features for task management, meetings, decisions and more. Whereas each has a way to display the circle structure, it is not the main focus of the project as all are aiming to function as a multi-purpose tool for an organization. Especially Glassfrog, Holaspirit and Nestr.io have a close link to Holacracy.

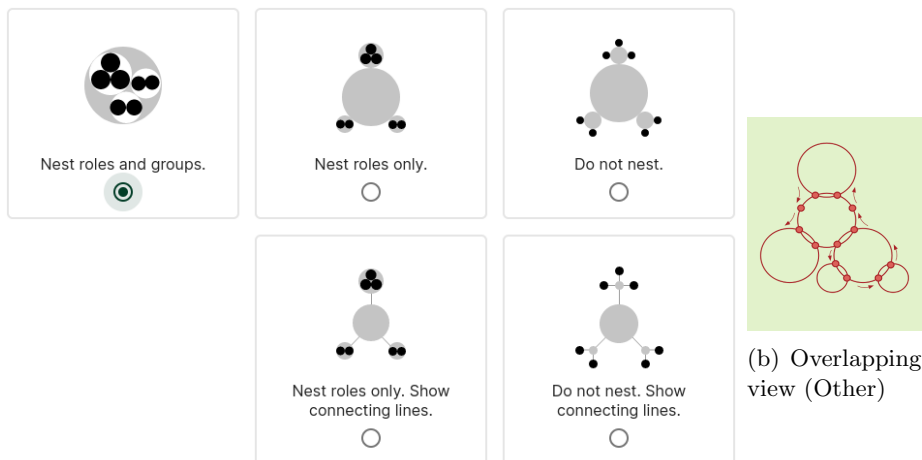
## 4 Recommendation

For the display of SoFA’s organizational circle structure the Helping circle recommends that IT Circle choose between Kumu (with database), Peerdom, or Maptio. Other tools mentioned in the previous section are discounted for one of the following reasons: not very powerful at organizational structure, too tight to Holacracy, too expensive, or too heavy weight. We believe that at this time it is best to keep the scope small and not to introduce another tool to SoFA with

too many functions and which would open up another communication channel. A general set of features an ideal tool would have are the following:

- show the relationships between circles in a branched view
- clearly distinguish between circles and roles in diagram
- show circle members with image
- store aim and domain of each circle
- provide a list of each holder of the same role
- display individual member profiles with a list of their circles and roles
- ability to integrate with other tools and possibly automated updating (linked to decisions made in each circle)

Each software solution has the potential to fulfill these features. What is currently missing the most is the display of roles in the organizational diagram. SoFA uses a branched view of circles: the circle structure is spread out compared to a nested view. As roles are defined within a circle, the best way to display roles is to show them nested in the circle holding the roles. Peerdom is the only software providing several built-in views (see Figure 6a). Another way of showing the circle structure is a view with overlapping circles (see Figure 6b) which none of the software provides.



(a) Different views available in Peerdom (Screenshot)

Figure 6: Different views to show a sociocratic circle structure

More importantly, the question should be raised about how information is stored in SoFA and how do the software systems integrate best. The places where information around circles is stored should be reduced and it should be clear, what the main source is. It is relevant how the interplay with the meeting minutes documents and the policy manual is. SoFA is on a path with several tools which is on the one hand a good way to keep independent from software, on the other hand maintenance is higher and automated updating and

integrations are missing. About the circle structure the question is whether a software product should also serve as an information storage and replace current structures or whether it is mainly a displaying tool with information fed into the software. The latter is how Kumu is set-up, getting the information from a local database. It is unclear whether the same database could be used to set-up Maptio or Peerdom. With the open-source aspect and a self-hosting option Maptio provides more potential to be customized to existing structures. Peerdom works best with all the information and also members on the platform.

Looking at workflows, it is recommended to have a designated team that is taking care of the organizational diagram. Giving members the possibility to edit the information themselves is a good feature, but it certainly needs a focused responsibility to keep the diagram up to date. This is currently held by the logkeeping team and is recommended to keep it that way. Current workflows, like tagging the log keeping team in the minutes document, are working fine. Still an easy way to update the diagram decentrally from each circle could enhance the participation of secretaries to keep the diagram up to date.

Last, SoFA has an example character. This relates not only to its own use of sociocracy, but extends to the choice of software. Therefore it is relevant to ask how much the tools SoFA uses are aligned with the mission and values lived in the organization. In particular this raises the question, how much SoFA is aligned with the open-source movement and alternative economic models. In this regard Maptio stands out as being on a pathway to embed these two principles.

Overall, let us summarize the possibilities. There is the option to stay with Kumu and extract additional information on request from the database. This wouldn't require much changes, but limit the ways roles are displayed in the organizational diagram and how easy it is to gain insights to the organization. With Peerdom one can build on an established connection with a motivated and very responsive team and the software has the widest range of useful features. It raises the question how much information should be transferred to Peerdom with the tension of locking ourselves in. The tool is expensive when using with many users, but affordable when only having a few editor seats. Members of the helping circle were very excited about Maptio, with its mission driven approach and pleasant design. It provides many features needed, but misses out on some clarity around displaying roles and on not having a branched view of circles. Maptio has a small team and it might be open to team up and work towards the desired features, but also seems to have limited capacities. Possible next steps can be the following:

- logkeeper provides an immediate report and creates several summary lists: all role holders for facilitator, leader, delegate and secretary, list of circles for each member, average number of circles per member
- replace Kumu with Maptio or Peerdom in order to visualize operational roles
- follow-up with Maptio about advanced views
- work on guidelines where to store circle information, also considering the policy manual and the header of the minutes documents



## 5 Outlook

The next step is to bring this report to IT circle which holds the domain of making decisions about an organizational diagram software. After the completion of the report, the Helping circle ceases to exist and the activities will fold back into IT circle. Remaining action and backlog items from the Helping Circle will be presented to IT circle.

In the future other categories or software needs can be discussed in more detail, e.g. SoFA's communication systems. Also this work doesn't address tensions around using Google Docs for meeting capturing. Some challenges around this are that it requires too much editing to do agenda changes, doesn't provide an automated agenda creation or any integrated features (e.g. changes will automatically update in the organizational diagram).