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Operating Principles

Of the Evolutionary Leadership Community

In effect since February 15th, 2018 (Version 6)

These principles are based on the actual practices of the Alpha prototype of the community that we tested from October to December 2015 and the Beta prototype tested from January to December 2016. Subject to change based on suggestions approved in accordance with a. 8.1.

I. Purpose:

The purpose of this community is to support people who work in different sectors and geographic locations, as well as on various levels of institutional power in developing a capacity to mobilize themselves and others to consciously and effectively redesign worldviews, cultures, and institutions for a more just, sustainable, and flourishing world.

II. Vision: We are building an international community of practice that would:

2.1. itself be just, sustainable, and flourishing

2.2. not exclude anyone based on their ability to pay

2.3. build on the solid foundation of knowledge and practices of the Institute for Evolutionary Leadership but also grow and evolve its wisdom through inviting various schools of thought to participate

2.4. allow members to be actively engaged in its designing and offer services such as workshops and educational programs to their fellow members and have guaranteed decent financial reward for their contributions

III. Overview:

3.1. Members contribute with flexible monthly dues as well as submit, discuss, fund, and act on proposals that help develop the community and Evolutionary Leadership capacity of the members.

3.2. The community operates based on the principles presented in this document. The Institute for Evolutionary Leadership acts as the steward of these principles, provides infrastructure and administrative support to apply these principles in practice, provides clarifications and runs procedures that allow members to add to or change these principles.

3.3. New members are added based on the recommendation of current members. This means that candidates should take time to develop relationships with current members and gain their support to be able to join the community.



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3.4. Fulfilling the minimum requirement of understanding the concept and model of Evolutionary Leadership as determined by the Institute for Evolutionary Leadership is highly recommended to all new members, and it is required for submitting proposals.

3.5. Members can choose different of levels of involvement:

3.5.1. The minimum activity required to sustain active membership is contributing with monthly membership dues. If a member fails to pay membership dues according to their Stripe payment plan or a special agreement with the IEL and does not reinstall their plan or successfully renegotiate a special arrangement with the IEL within 15 days after the IEL notified the member of the situation, this member's membership status gets deactivated and the person does not participate in the next funding cycle.

3.5.2. From the 1st to the 20th day of every month every managing member (see a. 4.3.1) can go to the Co-Budget system and allocate their funds among proposals they want to fund. This is very important for healthy functioning of the community, so all members are strongly encouraged to participate in funding, however this is not required for sustaining membership.

3.5.3. Besides technically funding proposals in the Co-Budget system active members can also give feedback on these proposals, as well as contribute to the design of the funding strategy of the community, connect with each other and exchange questions, insights, and resources, as well as participate in community events.

3.5.4. Fulfilling the minimum requirement of understanding the concept and model of Evolutionary Leadership as determined by the Institute for Evolutionary Leadership is highly recommended to all new members, and it is required for submitting proposals.

3.5.5. Finally, members can participate in governance by influencing acceptance of new members by calling for and/or participating in governance meetings/calls, discussing governance issues, and raising objections to changes suggested by self-organized initiative groups.

3.6. Membership can be terminated by sending a written request to the Institute for Evolutionary Leadership, as a result of the failure to pay membership dues, or through a decision made by the majority of active members who responded to the request to vote for terminating membership of a particular member via a standard governance procedure (see a. 8.1).

IV. Monthly Funding Cycle:

4.1. 1st Day of the Month: Budget Announcement

4.1.1. By the 1st day of every month members contribute with flexible membership dues. It is up to each individual member to choose how much they contribute in a specific month.



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4.1.2. The primary form of payment is recurring payments via Stripe that can be changed or cancelled at any time with the effect taking place within 2 business days. Other form of payment are possible in special cases and should be coordinated with the IEL.

4.1.3. If a member fails to pay membership dues according to their Stripe payment plan or a special agreement with the IEL and does not reinstall their plan or successfully renegotiate a special arrangement with the IEL within 15 days after the IEL notified the member of the situation, this member's membership status gets deactivated and the person does not participate in the next funding cycle.

4.1.4. On the 1st day of every month each managing member (see a. 4.3.1) is allocated voting funds in the Co-Budget system that can be used to fund proposals. By the 1st day of the month members who want to keep control over their funds should follow the procedure described in a. 4.3.1. Those who did not follow that procedure, except new members, have their funds allocated to managing members. All new members are considered managing members for their first funding cycle in the community.

4.1.5. The amount of funds each managing member is allocated on the 1st day of a particular month equals the amount of their latest membership dues plus an equal share of sales plus an equal share of the balance from the previous funding cycle plus an equal share of funds contributed by non-managing members. If fund allocation of a particular member includes fraction of a dollar, the amount is rounded down which would lead to a slightly smaller overall community budget available on the Co-Budget system.

4.1.6. All active members are notified of the amount of funds available for the community in the current month as well as all proposals currently open for funding on the 1st day of the month in a Budget Announcement email.

4.2. 1st – 20th Days of the Month: Funding Stage

4.2.1. From the 1st to the 20th day of each month managing members can use their funds to fund proposals on Co-Budget. New proposals can still be submitted and opened for funding at any time.

4.3. 20th Day of the Month: Program Announcement

4.3.1. On the 20th day of each month all active members receive a Program Announcement email that announces proposals that have been successfully funded and presents all pending requests to join the community. In the same email, each member is asked to indicate whether they would like to use their right to manage their funds in the next funding cycle by clicking to a hyperlink "I want to use my funds next month". Members who want to keep control over their funds should follow this procedure by the 1st day of the next month before the Budget Announcement comes out. Such members are called "managing members".



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4.3.2. Each submitter whose proposal has not been funded by the 20th day of the month can decide whether they want to withdraw their proposal (which can be resubmitted again) or keep this proposal open for funding in the next funding cycle.

4.3.3. If a proposal that has not been fully funded is withdrawn, all funds allocated to it get equally redistributed among managing members for the next funding cycle.

4.3.4. If a proposal that has not been fully funded stays open for funding, it keeps all the funds allocated to it and may be fully funded during one of the future funding cycle.

4.4. 20th – 25th Days of the Month: Admission Stage

4.4.1. From the 20th to the 25th day of every month submitters whose proposals have been fully funded provide all information/materials necessary for marketing (if any) to the IEL.

4.4.2. From the 20th to the 25th day of every month any active member can express objections to admission of a particular prospective member by responding to the most recent Program Announcement email. If such objections are raised, the admission of the particular member is postponed until the objections are discussed and resolved.

4.4.3. Prospective members who set up a recurring payment plan with Stripe or coordinated an alternative form of payment with the IEL can enjoy member privileges in attending community events during the month when their candidacy is presented in the Program Announcement.

4.5. 25th Day of the Month: Admissions Announcement

4.5.1. On the 25th day of every month admitted candidates are notified of the decision via email and provided with onboarding instructions.

4.6. 25th – 1st Days of the Month: Reflection Stage

4.6.1. From the 25th to the 1st day of every month members reflect on the past funding cycle and prepare for the next month.

V. Financial Model:

5.1. The community operates on a monthly budget that consists of most recent membership dues, community revenue (sales of workshop tickets to nonmembers, etc.), and the balance (whatever is left from the previous funding cycle).

5.2. On the 1st day of every month each managing member is allocated the amount of funds that includes their most recent monthly contribution, an equal share of the community revenue, an equal share of the balance, and an equal share of contributions made by non-managing members.

5.3. Any member who attended an introductory seminar or other introductory activity approved by the IEL can submit a proposal. Each proposal should include proposal budget - the amount of



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funds needed to take successful action on the proposal: this should include 30% administrative fee for all proposals and at least \$130/h for educational proposals.

5.3. Members use their funds to fund one or several proposals. Each member can choose whether they want to put all the funds in one place, allocate them among several proposals, intentionally keep their funds from being used to fund current proposals, or to waive their right to fund proposals during the particular cycle.

5.5. If a managing member did not use part or all of their funds by the 20th day of the month, whatever is left contributes to the balance that gets equally redistributed among new managing members in the beginning of the next funding cycle.

5.6. If a managing member did not use any of their funds, that managing member loses their right to be a managing member next month. To indicate their conscious choice to save their part of the budget for later managing members can make a symbolic \$1 contribution to any of the available proposals. This article does not apply if by the 20th day of the month none of the fundable proposals announced in that month's Budget Announcement is open for funding.

5.7. The Institute for Evolutionary Leadership withholds 30% of the budget of all fully funded proposals for administrative support that includes running (and paying for) all billing, communication, and management systems, accounting & tax support, event registrations etc..

5.8. Tickets to educational events (in special cases other types of events as well) are offered to nonmembers at market rate determined by the submitter of the respective proposal. All money from ticket sales goes to the community as community revenue and gets equally distributed among managing members during the next funding cycle to be used for funding new proposals.

5.9. Member-teachers whose educational proposals were funded are guaranteed \$130/h from the community for their work unless they do not show up for their event or did not provide comprehensive and relevant experience to the participants. Member-teachers are paid by check or other mutually acceptable form by the Institute for Evolutionary Leadership, LLC after they send an invoice and their W-9 form. For reimbursement of expenses funded by the community, members only need to send an invoice, no W-9 is needed in this case.

VI. Submitting & Discussing Proposals:

6.1. All active members who attended an introductory seminar (approved by the IEL) can submit proposals in the Co-Budget system at any time. There are the following main categories of proposals:

6.1.1. LEARN: Educational offerings such as workshops, seminars, and educational programs.

6.1.2. PRACTICE: Participatory events, experience-exchange sessions, and other opportunities aimed at sharing insights from practicing Evolutionary Leadership and/or fostering collaboration among members in their professional domains.



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6.1.3. CO-CREATE: Proposals aimed at facilitating relationship building within the community and/or design/governance of the community.

6.2. All proposals should provide clear benefits to the community and its members in alignment and direct connection with the purpose and vision of the community.

6.3. All educational proposals should have clear connection to Evolutionary Leadership through one or more categories of the Evolutionary Compass.

6.4. Proposals submitted for discussion can be first drafts or carefully elaborated texts, and by the time a proposal opens for funding it should contain the following information:

6.4.1. Title should contain:

6.4.1.1. Category (“Learn”, “Practice”, or “Co-Create”)

6.4.1.2. Evolutionary Compass Abbreviation (for Learn proposals) [2]: OD - Ontological Design PE - Personal Evolution SS - Systemic Sustainability EV - Evolutionary Visions, Scenarios, and Principles EL - Emotions & Generative Language AW - Adaptive Work & Collaboration EP - Evolutionary Purpose

6.4.1.3. Length (number of hours)

6.4.1.4. Brief but descriptive tagline

6.4.2. Main text should contain:

6.4.2.1. Date/Time (can be TBD);

6.4.2.2. Place (if any);

6.4.2.3. Detailed Budget;

6.4.2.4. Ticket Price (if applicable);

6.4.2.5. Number & Names of Teachers;

6.4.2.6. Number of Attendees, applicable Evolutionary Leadership Competencies;

6.4.2.7. Description of the proposed activity.

6.4.3. In accordance with the responses to the survey by founding members, 30% of the budget goes to the Institute for Evolutionary Leadership for administrative & fiscal support, therefore budget for each specific proposal should be divided by 0.7 (so, for example, compensation for each hour of teaching should be counted as $\$130/0.7=\185.7).

VII. Funding & Acting on Proposals:



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7.1. Each submitter decides when they want to open their proposal for funding. Proposals open for funding by the 1st day of the month are announced to all active members in the Budget Announcement email.

7.2. From the 1st to the 20th day of every month managing members allocate their funds among proposals they want to fund. It is allowed and encouraged to coordinate funding actions.

7.3. Proposals that are fully funded by the 20th day of the month are announced to all active members in the Program Announcement email.

7.4. From the 20th to the 25th day of every month submitters whose proposals have been fully funded provide all information/materials necessary for marketing (if any) to the IEL.

7.5. Submitters of fully funded proposals are responsible for acting on the proposed activities in collaboration with and with support of the Institute for Evolutionary Leadership and other members.

VIII. Changing Operating Principles:

8.1. All active members can discuss governance issues, generate suggestions, and request the Institute for Evolutionary Leadership to organize voting on these suggestions. Within 30 days the Institute for Evolutionary Leadership reaches all active members via e-mail and gives them 15 days to vote. The suggestion is adopted if more than 50% of the members who chose to vote voted for the suggestion. This procedure does not apply to accepting new members: candidates cannot join the community if there is at least one active member who objects it.