

The Design Team Process

A Local Community Empowerment Tool

By

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The Design Team Process is an integrated team process that proactively contributes to the social, evolution of a community, city, state, and nation.

The Design Team Process provides a continuation of the traditional, long history of town hall meetings that uses a rational and synergistic process to gather the intelligence of small teams of local citizens to create solutions for common community, societal, and political problems.

The Design Team Process is fundamental for sustaining the legitimacy and effectiveness of the democratic process and the survival of democratic cultures.

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The Design Team Process

2nd Edition

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The Design Team Process

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— *opus unius hominis vitae* —



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A democratic society will only become sustainable
When the combined decisions and actions of
Individuals and organizations
Work for the same goals of sustainability.
Both have an equal moral responsibility for
The survival and sustainability of future generations.
Both are required to maintain the continuity of society
By preventing social disintegration
And ensuring that a democratic society evolves.
Only then will society be able to provide an
Improving quality of life and the potential of growth
Equally for everyone,
And assure the same for future generations.

Introduction

The Design Team Process is a social and political empowerment process. One team can come up with highly creative solutions to community problems and topics, while numerous teams working together have the capability to become immensely powerful for offering ingenious solutions to support state, national, and international problems.

The Design Team Process gathers the intelligence of 5-11 people working in a team can create solutions to almost any topic of material or social sustainability. It develops options to social problems and issues by a collaborative process of decision-making where the creative solutions can become applicable in almost any democratic culture, society, and organization. Because it is an option-development process of decision-making with wide applicability, its philosophical, moral, and ethical foundations are grounded in the commonalities of all humans, their values.

That working foundation and credibility of The Design Team Process lies in the universal and timeless commonalities of the Homo sapiens species — the four primary values, (life, equality, growth, and quality of life), and the three secondary values (empathy, compassion, and a generalized love for humanity), that emanate from the primary value, Equality.

Though the four primary values are the original cause for sustaining the survival of our species, the three secondary values balance individual and the collective behaviors of humans to give them the capability of being humane and humanitarian.

SEVEN VALUES HAVE SUSTAINED OUR SPECIES' SURVIVAL



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"Love and compassion are necessities, not luxuries
Without them humanity cannot survive."
— Dalai Lama

The necessary but final missing element to sustain organizations and governments, which give people the capability of establishing a nation, is a universal and proactive morality and ethic. Fortunately, when we examine decision-making using the seven values, we soon discover that we are also able to create a proactive morality and ethic based on those values. That possibility becomes obvious once we recognize that values always underlie decision-making, and that using these seven values obligates us, for example, to value life *equally* for others as we do for our self because these seven values are innate to each person. Because of that these seven values exist as an integrated, interactive system of values, the basis for an integrated, logical morality and ethic.

The decision-logic of the system of the seven innate human values is expressed in the ethics and moral logic sequence illustration below.

Seven Values → Moral Definitions → Ethics Statements
→ Expressed Ethics → The Graces of Expressed Ethics

- **Seven Values** underlie the decisions that have sustained the survival of our species;
- **Moral Definitions** provide us with a set of rules to guide human decisions and actions to prevent destructive life-altering behavior of human interaction;
- **Ethics Statements** tell us *HOW TO* fulfill Moral Definitions.
- **Expressed Ethics** are synonymous with ethical principles that tell us *WHAT TO DO* to fulfill Ethics Statements. Expressed Ethics identify their place in the logic-sequence, being supported by the seven values, moral definitions, and ethics statements. Ethical principles are synonymous with Expressed Ethics to provide the ethical standards for corporations, governmental agencies, public and private agencies to conduct business without jeopardizing their personal and business integrity, to improve those relationships, and reduce their exposure to liability. Traditional ethics principles, however, have never been founded on timeless, universal, and irreducible values. The result has been an abundance of ethical theories without being grounded in a timeless and universal foundation of irreducible values

- **The Graces of Expressed Ethics (TGoEE)** is the fifth stage in the logic-sequence that provide the *élan* of social interaction.

The Design Team Process integrates all of the elements just discussed to give any organization, at any level from local neighborhoods, communities, and onto nations, the capability to generate progressive and positive social evolution at the local level and eventually the national level.

Because these commonalities are innate to each member of a Design Team, the outcomes of the Team become applicable to all people of any democratic nation. When a Design Team becomes operational, it also becomes a powerful catalyst for social and political action, and when numerous Design Teams collaborate on a particular category of social, political, or economic issues, their results can become applicable to many organizations. If you follow that logic, you will also realize that when the values of an organizational culture are changed, that change will eventually extend to cities, states, regions, and to a national culture.

The source of authority and political power of any democratic nation has always rested in the individual, and collectively in the public. Now, individuals collectively in their communities and associations can become effective to change the course of any organization, even their governments from the size of a home owners association to a national political party. The democratic process has always begun with thoughtful individuals who gather together to change the course of their destiny. Now they have an organized, rational, and intelligent process to do so effectively.



It is by the decisions of individuals
that organizations will be improved or decline.

It is by the decisions of organizations
that our democratic societies, nations,
civilization
will be sustained or fail.



There are no shortcuts
for a civilization to become self-sustaining.

Only sound intention, moral fortitude
and unflinching perseverance by citizens
offer the capability of moving families,
communities, and whole societies
in that direction.

Part 1

Getting Started Locally

—

Values underlie all decisions — always.

1

Initiating a Local Design Team

The Organizer

Every community has within it certain individuals who possess the wisdom to understand and appreciate that cultural leadership means looking out for future generations by proactively preparing today. Although their numbers have been calculated at only 1% of any population, they are those natural born volunteers who come forward on their own initiative. They are the forward-thinking individuals who will initiate Local Design Teams in their communities without being asked. They simply see that it needs to be done and begin.

The Organizer is a person with leadership qualities who possesses insight, courage, curiosity, and initiative. The role of Organizer is an important one. He or she chooses a topic they hope will become a socially sustainable design. The topic that holds the interest for the Organizer will often serve to captivate and motivate the energy and action of others. Teams usually form around a common interest shared by team members, such as the design of sustainable health care services, sustainable education systems, pre-school programs, home healthcare, child rearing, sustainable relationships, community gardens, and sustainable organizational designs, for example.

Recruiting. Once the Organizer has identified the topic of inquiry, he or she will begin the process of recruiting team members. The Organizer may initiate recruiting by discovering like-minded people who share the same interest for improving a social issue, social policy, or institution in their community. These may be people who are familiar with the Organizer or people with whom the Organizer has a social connection or from their employment. Secondly, the Organizer will also want to recruit people who have skills for the various Team member roles. Writing an article in a periodical or other publication might generate interest from those who may be unknown to the Organizer but who share the same interest and concerns.

First Meeting

Once the Organizer has identified the subject, and recruited a sufficient number of potential members for a Design Team, he or she may wish to invite them to attend a social gathering to discuss matters informally.

The purposes of this informal social gathering are several:

1. The Organizer will make the details of his or her intentions known to the group by outlining those intentions and why they are important.
2. The Organizer will discuss the make-up of a Design Team, the roles within the team, and the options for decision-making. Thereafter, potential team members should be invited to ask questions as well as make comments and suggestions.
3. **Team building and bonding** begin immediately. This is a time for the potential Design Team members to get acquainted with each other and begin the process of bonding as a potential team, and for discovering the “best fit” of each individual in the team.

Some will volunteer and join in, and some may choose not to. Team members who choose to volunteer will want to discuss their qualifications for the various roles of the Design Team. When enough volunteers for a team (5-11 members) have been enrolled, the role of the Organizer will have been completed.

The role of Organizer is an important role, but it is only temporary. The Organizer may not become the Facilitator, but another member of the team in a role for which he or she is qualified.

Where do we begin? After getting acquainted and in the early stages of bonding, the team will ask itself, “Now, where do we begin? What do we do?” One of the first considerations is to find a suitable location where the team can meet and conduct its business without interruptions. Soon the team will discover how necessary it is to plan their efforts and to plan the effective use of its resources — the time and participation of team members.

For instance, some teams may decide that all team members “do their own thing” and then come back together and discuss those parts. Other teams will work simultaneously with everyone present, and produce in their own way, where everything stays at the same level of progression. The

Design Team Process is a new way of doing business for most people. You are, in fact, learning how a sustainable Design Team works. The team and its operation must as well become sustainable within its operation. It does so by each member keeping their fingers on the pulse and vital signs of team process, so that all elements progress together.

Decision-making. Members will soon need to discuss and discover how the team will make decisions. Quorum, majority, 2/3 majority, unanimity, and consensus ¹ are available. Although the “flow” of work in the team may become seamless to provide a uniformity of direction when options are exercised, there will come times when an actual vote count will be necessary. It is good to have that worked out ahead of time. To gain insights and wisdom about what is occurring, and the possibility that the Team has blind-sided itself by not exposing a topic that is vital to decision-making, it is time to call upon the Consultant for guidance.

Team Building

Building a working and functional team involves discovering the common interest and common experiences that help develop a bond and sense of oneness between team members. Doing so, the Team can achieve results they could not achieve by themselves. Each member must provide a willingness to work with others to achieve personal and common outcomes. Working in a Design Team is as much a process that joins people with their hearts as well as their minds. *For separate individuals to work together closely, they must first share mutual experiences to appreciate the commonalities of their lives.*

We must establish a personal connection with each other.

Connection before content.

Without relatedness, no work can occur.

Peter Block, Consultant

http://www.peterblock.com/about_peter/

¹ Peck, M. Scott, M.D., 1987 *The Different Drum – Community Making and Peace*, especially Chapter III, “The True Meaning of Community,” p 59-76

Team building is an ongoing and critical element for the smooth functioning of the Design Team. By sharing similar experiences and discovering those commonalities, emotional ties develop – evidence of social and emotional bonding between members that ties them all together in a “shared community” of personal experience. The team building that began at the very first social gathering of potential team members now has become an ongoing facet of the Design Team Process. Team members have begun to see their team as a social process that promotes efficiency, cohesion, and creativity that effectively produces outcomes, as well as growth by individual team members.

Team Building can only occur when members feel socially and emotionally safe that then leads to trust. The Facilitator plays a highly important function almost immediately by facilitating the early stages of team building: The team can only become highly effective when the team has become a framework for positive interaction among team members where each feels the freedom to express his or her own viewpoints without criticism or rejection, and where each member respects the viewpoint of other team members. Feeling safe emotionally leads to a shared trust and ultimately to confidence in the process itself so that the team achieves focus, unity, and direction. Without a firm feeling of being safe, trust will never develop, and the bond within the team will be weak and ineffectual.

A Design Team that has bonded effectively is able to operate without an authority figure, yet possesses unity of effort and purpose. Members have roles and functions within the team, yet the process is free-flowing in nature permitting the creative ability of individual members to emerge and contribute to a synergy of effort that far surpasses what individuals working alone can accomplish. An effective Design Team promotes and uses the best attributes, skills, and abilities of each member.

This is not an environment where team members can hide their prejudices and biases! Design Teams work best when each member is transparent, and has no agenda, ulterior motives, or ego pursuits (power, control, authority, and fear). Ego issues and the lack of transparency are contrary to the humility that is crucial to the functioning of the team. Though the Team uses the Team Process to expose and identify beliefs and assumptions for their project, the very same process will help the team discover and identify the unsustainable beliefs and assumptions of each

team member. The result of good team building is that a Design Team will become socially sustainable in its own right to fully develop its potential to design functional socially sustainable systems. A Design Team must demonstrate within its own operation consistency with the seven values of social sustainability, beliefs, expectations, and the associated ethics of those values.

A Functional Team Environment. Though the team is not a therapeutic environment, individual agendas and ego manifestations will become very evident in a team environment, and these often work against the productive outcome of the team. This is a nuance of teamwork that must be worked through, and particularly in a team environment that does not use the position of a leader, “boss,” manager, director, or *el jefe*. Rather, this is an egalitarian group of individuals who have particular roles that assist the team to function more effectively. When a team begins to work together more than 100 hours, members will find that most of the human problems and human ego/personality disorders become highly evident and manifest, and individual members will either work toward their maturity and growth or opt out of the team. A team will be very fortunate to have a member who is trained in some form of inner personal development, to aid the Facilitator.

As a team member, you are there to assist your fellow team members — not to be a crutch to them, or to enable them — neither are you there to be an antagonist to bedevil them about their shortcomings. The Consultant’s responsibilities include bringing these sticky, personal issues to the forefront of the team. This is different from the role of the Facilitator — this is the venue of the Consultant.

The Art of Inquiry, Reflective Thinking, and Discernment

Inquiry is the primary function of the Design Team: It is the thoughtful business of asking questions, and answering them. The Design Team process is dependent upon the capability of all members to ask questions and it is the duty of every team member to ask questions. No questions, no answers. The best questions are intuitive and cogent to reveal the fundamentals of sustainable social institutions. Students will learn a great deal from Chris Argyris’ book, *Action Science*, which deals with designing organizations that contain an embedded learning component with the

capacity to learn from mistakes. *The Fifth Discipline, the Art and Science of the Learning Organization*, by Peter Senge, discusses organizational systems that lead to learning. It is suggested that you research “inquiry and reflection,” “inquiry and advocacy,” and “inquiry process,” for guidance to ask productive questions.²

Reflection. Individual and group reflection is imperative for gaining insights and wisdom about the Team’s project. It is a subtle means of accessing inner wisdom. For conundrums, problems, or questions that remain problematic and irresolvable even after rigorous discussion, Joseph Jaworski in his book *Synchronicity* suggests that team members should take a recess from discussion, go apart and enter into their own meditative state of contemplation or reflection. By stilling the mind and asking specific questions of the inner Source within them, members will receive the answers and guidance sufficient to move forward.

The beginning of growth for everyone is to take time apart, time aside to reflect on your life and your experiences. Some have seen this as a waste of time as getting nothing done, but it is strongly argued that the most creative moments that have guided the course of our world, materially, spiritually, socially, psychologically in all regards were generated through a time of reflection and contemplation by individuals.

Teams offer a generous opportunity for individual growth, to work in unison with others to accomplish a common goal. The individual grows within themselves and within the team. Yet, there will be times when a team member will need to go aside to consult and reflect within him or herself to consider what is developing. From our personal experiences we must invoke our capacity to reflect, and from reflection we will derive a “lesson” for that individual situation. From lessons, the reflective mind will grasp the over-arching “wisdom” of similar lessons. This is how the individual grows. This is how wisdom is gathered. Only when individuals share their wisdom in team and community settings will societies become great.

Reflective thinking is a very powerful tool. Peter Senge, Chris Argyris, and Joseph Jaworski all have much to say about using reflective thinking

² Sesno, Frank 2017 *Ask More* Amacom, New York, New York

Jaworski, Joseph 2011 *Synchronicity, The Inner Path of Leadership*, 2nd Ed., Introduction by Peter Senge

Wright, Kurt 1998 *Breaking the Rules* ISBN: 0-9614383-3-9 CPM Publishing, Boise, ID

and reflective action individually and in the team setting as a way of accessing wisdom and insights that are not available during the busyness of life. Reflection involves the relevant experience without an agenda, without a procedure for analysis, but rather by the stillness of our mind to do its business more profitably when the conscious side of our mind is still. Unfortunately, few teams will become conscious of the “still water” of movement in the team as a signal to withdraw into stillness and reflection. These reflective moments are when our mind is free to rearrange the bits and pieces we are trying to make sense. It knows your intention for these moments, so let it do its work.

When team members return to the presence of their team work, then that wisdom and those insights can be shared with everyone, where the sum of what members return to the team setting is far, far greater than when they went into their reflective retreats. Minutes of reflection can often reveal far more than hours and days of intense activity striving to do the same work. The secret is *letting* — taking a moment apart from the Team to *let* your mind take the reins of your inner process to find its direction. Some members may wish to engage qigong, tai chi, yoga, or some form of quiet motion as a means of letting the thoughtful side of their brain move into stillness. And, it is very relaxing!

Discernment.

From Merriam-Webster –

Main Entry: dis*cern

Pronunciation: di-*s*rn, -*z*rn

Function: verb

1 : to detect with the eyes : DISTINGUISH; 2 : DISCRIMINATE;

3 : to come to know or recognize mentally

–dis*cern*ible adjective

–dis*cern*ment noun

As a thinking skill, discernment seems to have been ignored or an under-developed skill; and has had little emphasis in educational systems. Yet, it is essential in all social, political, financial activities and in the grocery store. Because the Design Team Process is totally dependent upon the thinking skills of the team members, the following considerations should prove particularly useful.

The following excerpt, concerning the vital importance of discernment, was taken from the author's paper, *Artificial Intelligence, A Protocol for Setting Moral and Ethical Operational Standards*.

* "AI [Artificial Intelligence] programming at its best comes down to incredible discernment. The best human intelligence is able to *listen* to a rational argument, *discern* the most salient factors, *reflect* on those factors with the foreknowledge of prior experience of self and others, *inquire* with cogent questions, and then is able to succinctly state the *lessons* involved. When there are several related lessons from similar experiences, then we can summarize those lessons into an overarching *wisdom* of them all that can be used successfully with similar situations in the future.

The danger of AI development is that most people have not been taught the basic elements of discernment; and do not have the ability to make competent, let alone cogent, distinctions of discernment. It is an elemental process of thinking, i.e., intelligence. Think of discernment as an app of the human intelligence. Proceeding with AI development without this process intact in the mind of program developers and coders, and the existential angst of Robert Oppenheimer to foresee what AI may become, will leave all future generations without representation in those decisions. Let us proceed very cautiously and begin by embedding the best of humane decision-making into the fundamental designs of AI."

In a Design Team several levels of discernment are necessary to achieve clarity of team member's contributions:

1. Discerning the Message

Does the message of the team member make sense? Is the message consistent within itself? Is it consistent with previous messages? Is the "meta-message" consistent with the speaker and the Team? Does the message make a meaningful contribution to our knowledge, or is it just more "fluff"? Does the message lead us in a direction that is consistent with our topic?

2. Discerning the speaker

Examining the message is the primary means for discerning the reliability of the speaker. If the content of the message revolves around ego issues or fear issues and is unchecked by the Facilitator or Consultant, they can

show up as almost invisible controlling influences that work against a Team's productivity, and integrity.

Ego — The intention of ego involvement is always some form of “return” that comes back to the speaker in some form of self-gratification, self-aggrandizement, power, and control. It is usually expressed as **1)** power in the forms of manipulation, control, authority, and position. This may take the form of an agenda that provides a political, financial, social, egoistic, or other form of return to the speaker; **2)** self-aggrandizement, self-importance, self-centeredness, selfishness, conceit, arrogance, and sometimes as “Guru syndrome” either projecting or accepting same from followers; and/or envy, jealousy, and more.

Fear — Fear makes statements of position and may express as judgment, biases, strong opinions, prejudices, bigotry, distancing, or withdrawal, for example, causing separation. Fear positions become known in the form of statements, attitudes, and opinions that shock or immobilize the group. Repeated presentations of a horrific and terrifying nature are signs of fear in the person when it causes fear in the audience. It, too, may be a method to gain power, control, and to be seen as the “guru” and/or savior of the group.

However, statements that cause fear that are NOT made often about horrific or terrifying topics may indicate the topic is real and that fear is an appropriate response. In that case, listeners may want to work with their own fears so that they remain effective members of the Team.

Mental Illness — In the case of aberrant thinking, i.e., what most people would call mental illness if diagnosed by professional psychiatrists or clinical psychologists, also falls into the realm of discernment. If you discern a message to be far out of the ordinary, and, for example, appears to involve paranoia, extreme fear, fetishes, or other neuroses, to name a few issues of aberrant thinking, and any of the other evidence of bizarre thinking, then you have discerned enough to reject the message. Dealing with the messenger then takes tact, skill, grace, and perseverance.

3. Integration and Separation

Generally, the work of the Team is toward integration, rather than separation. Ego, fear, and mental illnesses cause separation in some form. Our first observations are actions, then moving inward we observe/listen to the words, and these two indicators tell us what is dominant in the thinking of the speaker.

Process and Growth of Team Members

Individual Growth. The Design Team Process provides an excellent environment for unexpected personal and team experiences. It is through an emotionally safe team environment that individuals who trust one another, who contribute freely and unselfishly to pursue a common goal can gain understanding and grow. “Most of us at one time or another have been part of a great ‘team,’ a group of people who functioned together in an extraordinary way — who trusted one another, who complemented each other’s strengths and compensated for their limitations, who had common goals that were larger than individual goals, and who produced extraordinary results. ... Many say that they have spent much of their life looking for that experience again. What they experienced was a learning organization. The team that became great didn’t start off great — it *learned* how to produce extraordinary results.” (Senge, 1994))

The Design Team provides a high-level working environment of personal and social interaction. It provides a unique opportunity for curious and creative collaboration and for honest and authentic examination of existing social institution designs and their policies. Members who are interested in the same vision and goals for social sustainability can experience the exhilaration of being a part of something uniquely valuable over time. The lessons learned from these experiences are profound and lasting.

Straight talk, “Meta-talk,” and Non-verbal Behavior. Each of you will become more and more adept at “reading” what another team member is saying. It is especially important for members to convey their remarks without sarcasm or aggressive language. Those and other “messages within the message” are indications that members are examining a topic

with differing assumptions, even though they may have identical values and beliefs about that topic. That is evidence that it is time to expose those assumptions. Assumptions are neither good nor bad, but provide a hidden and defining meaning or agenda to a topic. Your team will need to examine all assumptions as part of the discovery process of working the Schematic. Your team will become incredibly productive and unified when those assumptions are revealed.

The “Observer-Self”. The Design Team Process is best served when each team member becomes a self-observer. The “observer-self” is someone who is a student of critical thinking — those skills that allow the person to observe their own thinking and its processes, and then seeks ways to improve the process by which they come to conclusions. By engaging in continual self-monitoring, each team member is able to effectively correct their participation within the team. This is an especially important and necessary function as the team matures and takes on its own identity. When team members act as an “observer-self” they reduce the need for the Facilitator, making the flow of the team process much smoother. Until this occurs, the Facilitator will provide that function, with reinforcement from the Consultant.

Critical Thinking. Team members who are capable of questioning their own beliefs as a means to uncover long-held assumptions provide a valuable service to the work of the team. This is the heart of critical thinking. Only by doing so will teams become more productive as members learn how to reason among themselves. Design Teams are truly reflective of the capability of our societies as a whole.

To quote Richard Paul and Linda Elder regarding critical thinking, “A well cultivated critical thinker:

- raises vital questions and problems, formulating them clearly and precisely;
- gathers and assesses relevant information, using abstract ideas to interpret it effectively [and] comes to well-reasoned conclusions and solutions, testing them against relevant criteria and standards;
- thinks open mindedly within alternative systems of thought, recognizing and assessing, as need be, their assumptions, implications, and practical consequences;

- and communicates effectively with others in figuring out solutions to complex problems.” ...

“Critical thinking is, in short, self-directed, self-disciplined, self-monitored, and self-corrective thinking. ... It entails effective communication and problem solving abilities and a commitment to overcome our native egocentrism and sociocentrism.”³ All team members must also become adept at critical speaking, critical questioning, and critical listening.

A Broader Understanding of Design Team Contributions

In addition to generating designs for sustainable social processes, local Design Teams provide an additionally valuable social service to communities, states, and nations. By becoming skilled at discerning, weighing, sifting and sorting values and gradients of options, team members evolve into citizens capable of providing mature leadership in their communities, states, and nation. Local Teams provide a valuable social service to the sustainability of their larger society by offering the broader public a realistic, validated educational process of how societies become socially sustainable, with citizens becoming more responsible for the leadership of their communities, states and nation.

Because local Design Teams offer their community, states, and nation a bottom-up way of developing designs for sustainable social processes, the overall benefits may not be obvious. Hundreds of Design Teams that come together as a system on the Internet become a perfect setting to bring about positive and constructive social, cultural, and political change. Thousands of team members provide a way of “informing” our culture of the realities that are required to underwrite the survival, social stability, and social sustainability of our societies. Local Design Teams will be able to examine the fundamental assumptions that underlie their social systems to discern those that are unsustainable, and those that quickly erode like sand when social tragedies wash across communities and nations.

³ Richard Paul and Linda Elder, *The Miniature Guide to Critical Thinking Concepts and Tools*, Foundation for Critical Thinking Press, 2008. Also see, www.criticalthinking.org

Perhaps the biggest assumption I have made is that people are concerned about their future and will become engaged in designing a sustainable future for their children and grandchildren. It is my hope that this is not an assumption but a reality of the character of citizens broadly. But it takes courage to begin.

Summary

The Design Team process and environment involve all the nuances that you have read about—and more. There is an interactive “flow” to the work that is being done that generates synergistic outcomes from the interaction and the insights of team members. Further, lacking a director or an individual who is in charge of the team requires that each individual accept personal responsibility for guiding and leading the team, and to consult with each other on an ongoing basis. Each team member is not separate, yet it is because of their individual uniqueness that each member can make major contributions to the whole integral operation of the team. It is this affective environment that goes on to produce something that is far and above what each member could do individually or consulting by email. This is why it is important that teams meet together in person as often as they can, rather than apart, so that they can work with this affective environment between and among them.

Yes, the Design Team Process may seem quite tedious, but team members will experience this flow once they become bonded with each other and begin working together. It begins early in the team-building process so that you become acquainted and get to know each other, to become more effective as a whole working unit. This is not something that can be pointed to on a color chart and say, “This is green 76A,” but it is rather a process that you will appreciate once you experience it. Trust yourself to proceed. Once you have identified and appreciate the feeling of the team process, you will come away from team meetings with an appreciation for each individual and for the work of the whole team. This is an outcome that is not completely measurable in objective, scientific terms.



Sustainable change, after all,
depends not upon compliance with external mandates
or blind adherence to regulation,
but rather upon the pursuit of the greater good.

Douglas B. Reeves

2

Design Team

Introduction

A Design Team provides a collaborative environment that in some ways represents a micro-image of our society with its beliefs and assumptions. A Design Team that is fully functional emulates in many the evolved democratic process of a Stage 3 Democracy. ⁴

In this collaborative environment, team members are able to explore their roles, (Inquiring Members, Recorder, Facilitator, and Consultant), and develop a synergism as they work through the Schematic's outline.

Some may ask, "Why is it necessary to use a team to work the Schematic? Why not use one person who understands it very well to save time?" There are two answers to this question.

First, Design Teams provide a means of accessing the individual and collective intelligence of several people to fulfill a creative project. The creative synergism that develops in a team can produce results that are far more creative and more complete than an individual working alone.

Teams offer a community or an international organization a means of tapping the intelligence, wisdom and creativity of several people. Compared to individuals working alone, teams can

- Generate many more ideas and innovation;
- Motivate each other by bouncing ideas off each other;
- Take more risks in their innovation;
- Develop a well rounded team "personality" that more accurately reflects the social "persona" of society;
- Stay on task more easily – to support the team process both socially and productively for the goals at hand;

⁴ Raphael, Daniel (2020) *Stage 3 Democracies* Available at <https://sites.google.com/view/danielraphael/free-downloads>

- Create a synergism of personalities, skills, work styles, and team role interaction that is unavailable to individuals, alone.

Second, the team's primary purpose is to design *sustainable* social processes, organizations, and policies rather than fixing problems. In order to create sustainable designs that have the potential of lasting 50-500 years, the underlying flaws inherent in the thinking of society that undermine its longevity must be exposed, identified, and tested to determine if they are validated by the three primary values. When there is a procedure of dialogue that produces this outcome, the designs of the team will have a far greater assurance of being sustainable in the long term.

The flaws inherent in the thinking of society stem from the beliefs and underlying assumptions that were internalized when the researcher was a child to become unexamined assumptions about everything external and internal to him or her. It is rare that an individual has the skills to isolate and identify the assumptions that underlie his or her beliefs. A team of individuals is better able to uncover those assumptions because members are "outside" other member's system of beliefs and assumptions. It requires the inquisitive diligence of a team of individuals to question, test, and validate the beliefs and assumptions of each other's suggestions to produce social designs that are sustainable.

Local Design Teams are "learning organizations" as Peter Senge would interpret them. To paraphrase Senge in his book, *The Fifth Discipline*, "In an era of immense social change, and social and global problems of immense dimensions, no individual has the answer." Design Teams provide a best solution for developing answers that promote bottom-up solutions from the collective efforts of everyone in each team, and hundreds of teams across nations.

By operating within the parameters of a Local Design Team, team members learn how to become sustainable as individuals and as a team to influence their communities. This happens as a result of a subtle but significant mind-shift whereby the individual constructs a new mode of thinking. It is this paradigm change of thinking that transforms not only the individual and team but their communities and eventually their entire culture as these local teams proliferate and begin to transform society incrementally. What we learn from this is that we are not separate. We

must shift our thinking from isolation to connectedness and from social fragmentation to wholeness. Finally, we will learn and accept at the core of our being that each of us is inseparable from one another and the whole of everything.

Local teams provide a remarkable hands-on experience for citizens to work with their neighbors, associates, and friends to learn how to build sustainable communities and societies. Because most technologically developed nations and their economies are knowledge-driven, the team environment will feel comfortable to most people. People enjoy working on a project that they can identify with, where their efforts produce useful results.

Hundreds of local Design Teams represent a new paradigm of social progress that will fill a vacuum of leadership. The products of hundreds of local Design Teams will provide a new paradigm of social leadership that reflects the best intelligence and application of wisdom from society. Bottom-up designs for social action will create a very broad base of intelligent support to overcome the tremendous challenges that await any democratic society in the 21st century and beyond. Through the direction found in the efforts of several hundred teams, social leadership is provided without an authority figure.

Roles, Functions, and Qualifications of Team Members

Though a Design Team is composed of several specific roles, every team member to a degree takes on the functions of every role. The team is composed of Inquiring Team Members, Recorder, Facilitator, and Consultant. The preferable number of members is 5-11, with 7-9 being optimum. Too few members inhibit the fluid nature of the team process, and too many limits its effectiveness, making it too fluid. Too many members often results in distractive side-bar conversations and the potential of cliques.

Inquiring Team Members. The task of asking questions is a responsibility of all team members, but it is the primary role of “Inquiring Team Members” to ask diligent, probing questions. Authors Peter Senge, Chris Argyris, and David Bohm all point to the capacity to ask questions as the most meaningful way of exposing assumptions and fallacies while

offering the possibilities of acquiring knowledge and wisdom for taking actions that change the outcomes to those that are useful.⁵ The team environment provides a socially and emotionally safe venue for members to suspend their assumptions, opinions, and judgments. A safe environment is necessary for the team to engage in a free-flowing dialogue among themselves without concern for “stepping on someone’s toes.”

It is helpful if Inquiring Members have experience in the field of inquiry and above all they should be curious. It is also helpful if they have had some training in the processes of inquiry and investigation to help develop cogent questions, questions that seem to intuitively lead to unraveling the topics of inquiry.

Because local Sustainability Design Teams are learning organizations that learn about the larger venue of their community and society, team members are also learning about their own personal inner processes and procedures of inquiry. Teams are composed of individuals who acknowledge the need for reflection and the examination of the procedures of inquiry so that their time becomes more productive. The task of Inquiring Members is vital to what the Team produces, or does not produce. This work is for those who are inquisitive and choose to use their minds and their time effectively.

Inquiring Members should engage one another in a respectful, cooperative, and non-judgmental manner. They should respect the different opinions and ideas that others bring to the table even when their own opinions and ideas may differ widely. They should strive to see each other not as individuals but as team members where the contributions of the group become significantly greater than the value of the sum of the individual contributions alone. It is this synergistic effect of the group process that will achieve the goal.

Inquiring Members should be humble but powerful. They should maintain their focus in the present moment. They are interested in the work of the team and take notes of their own insights. Doing so, the team

⁵ Senge, Peter M. (1994): 198; Argyris, Chris (1985): 236.; Bohm, David (2004): 70.

achieves inclusion and integration, oneness, and wholeness as an element of critical thinking and discernment.

NOTE: Teams will eventually realize that the Design Team Process requires an attention to detail. Yet as beliefs are validated, there will be no further need to go through the detailed process of redundant examination. There is a “however.” However, assumptions that underlie each belief may expand as each belief is examined in light of distinct ethnic groups, cultures, and nationalities that have their own set of assumptions for that specific belief. As you can imagine, it will be eventual that the clarity of the validation of any one belief will become more and more distinct as more and more sub-groups of belief are examined.

Recorder. The Recorder’s main function is to record that occasional “ah-ha!” insight, conclusion, or succinct comment that is often forgotten. The second function is to observe and note any change in the flow and process of discussion. Often in a highly creative, flowing team situation the topic of discussion may change rapidly as members make contributing comments about another topic, leaving the original topic as a “lost line of inquiry.” Having noted that the focus of the team has been deflected, the Recorder can later use their notes to assist the team to refocus on the original topic.

The Recorder takes note of the most important aspects of the team process, and any insights that contribute to the work of the team. Thoughts, insights, conclusions, and observations are all valid for recording, and later distilled and organized into “findings” or other conclusions of the Team. These may be published separately, with the Team’s Findings, or with the Findings of other Teams.

It is not desirable for the Recorder to take verbatim notes, as this would prevent him or her from making their own contributions to the team process. Though deeply connected to the development of answers to questions, the Recorder also takes on the role of “Observer”. The Recorder’s perspective to pose insightful, cogent questions as well as relevant and reflective answers is vital to the integration of the validation process. By providing an objective viewpoint, the Recorder provides a valuable contribution to the group process.

Facilitator. There are two functions of the team that the Facilitator is primarily responsible: one is the social process; and, the other is the production process. It is the Facilitator's function to guide these two processes for the most effective development of the Team. It is very helpful if the Facilitator has had training and experience in the areas of team building, team and group dynamics, group facilitation, team processes, and mediation, for example. This role is perhaps the most demanding within the team. The Facilitator must not only monitor him or herself but the team as well, and do so without butting in. The Facilitator provides non-toxic, non-judgmental guidance to team members and working sub-units of the team so the dialogue of the social and work processes advance.

In many ways the Facilitator becomes a trainer of the Team to the extent that training facilitates members in the art of effective inquiry, dialogue, reflection, self-observation, and discernment. Further, the Facilitator supports members to monitor their own problematic participation, and correct it independently. Often the Facilitator must act as a moderator, or even a mediator, but never an arbitrator.

This person facilitates the group dynamics and team process; monitors the evolution and development of the Team process, and records the conduct, developments, insights, progress, and product of the Team; and makes suggestions as to how to improve the Team process. The Facilitator acts essentially as a social lubricant, taking action only when necessary to keep the process running smoothly and productively.

Further, the Facilitator should have an awareness of his or her weaknesses and strengths; and, call upon the Team or outside resource to work with those skill deficits. The Facilitator must monitor him or herself as well as the team in order to avoid being too controlling. Effectively playing this role requires much patience and discernment.

Perhaps the best example of a facilitator is described by John Heider in his book, *Tao of Leadership, Leadership Strategies for a New Age*. The Facilitator leads by understanding the process of "how" the Team's work is completed, and leads only when the team stumbles in the process. Less is more. Following this method teaches the team how to do for itself as much as possible.

Joellen P. Killion and Lynn A. Simmons, in their book, *Zen of Facilitation*, 1992, tell us, an effective team facilitator:

- “● Establishes a sense of community that provides an open, honest and safe environment to share, explore, disagree, and contribute.
- Trusts his/her own intuition...functions from ‘gut feelings’.
- Listens carefully.
- Keeps the group on task and moving ahead.
- Stays in the now... rather than diverting to the past or future.
- Reveals the thinking of others in the group.
- Encourages the group to generate their own best solutions.
- Trusts the group’s ability to find their own direction.
- Lets go of preconceived notions.
- Models appropriate attitudes and behaviors.
- Develops a ‘seat of the pants’ feel for what is happening and what needs to happen next.
- Honors various perspectives.
- Refrains from only providing his/her point of view.
- Fosters independence...equalizes everyone’s sense of power.
- Establishes a sense of safety for group members.
- Regulates group member contributions equitably.
- Assists in bridging one concept or idea to another.
- Guides the interaction through reflective and clarifying questions.
- Moves group thinking from reacting to reflecting.
- Provides nurturing.
- Remembers that he/she is facilitating others’ process not his/her own.
- Does nothing when he/she is unsure about what to do.”

Facilitating Dialogue. Creating an *emotionally and socially safe* environment is a crucial function of the Facilitator. A safe environment is necessary for the team to engage in a free-flowing dialogue among themselves, and to allow Inquiring Members to ask questions without hesitation.

Typically, in the beginning phases of a new Team, the Facilitator will not participate very much in the topics of discussion, but rather monitor the functioning of the Team’s processes of dialogue. The Facilitator is there to assist in the development of the Team’s discipline of “dialogue,” including

identifying particular problems that inhibit effective dialogue. Later, as the Team has become more effective and has learned how to monitor and correct ineffective dialogue processes, the Facilitator may become just another participant with little need for ongoing facilitation of the Team.

The work of the team is to come to a convergence of assumptions, opinions, judgments, and beliefs about what they are designing. If they are shy to expose their assumptions, it is the Facilitator's job to guide them to examine their resistance. Then he or she will use this situation to train and facilitate dialogue to gain clarity about their resistance, and their assumptions.

Quirky Problems and Stumbling Blocks of the English Language. As Bohm tells us in his small book, *On Dialogue*,⁶ "The problems of thought are primarily collective, rather than individual." The following is a brief list of stumbling blocks to dialogue the Facilitator and team will have to overcome:

- The overlay that the English language gives to English speaking individual's world view;
- Cause-and-effect relationships;
- The linearity of thinking used for problem solution;
- The paradox of "the observer and the observed";
- Shared meaning;
- The pervasiveness of "fragmentation";
- The function of awareness;
- Undirected inquiry;
- and "the problem and the paradox", to name the major impediments to productive dialogue.

Proprioceptive. In all cases, for Bohm and Senge, it is highly important that the members become "proprioceptive", having the ability to be aware of their own thinking. When members practice this technique, they will be able to take the advice of an insightful bumper sticker — "*Don't believe everything you think!*" Becoming proprioceptive is a practiced skill that develops when an individual simply observes what they are thinking, without getting involved in the topics.

⁶ Bohm, David (2004) *On Dialogue*: 39.

* For Bohm and Senge, the facilitator's responsibilities include identifying particular problems that inhibit effective dialogue. *Bohm identifies dialogue as a process that is far different from conversation and discussion.* Dialogue is a process exposing the assumptions and opinions behind the words of the individuals who are engaged in the dialogue. Only by exposing and understanding those assumptions and opinions by the parties involved is it possible to have a dialogue that offers the possibility of clarity and coherence. This is how a society develops internal social homogeneity despite ethnic and other cultural differences.

David Bohm did not anticipate that a device as the Schematic with the seven values embedded in it that would come into being to facilitate dialogue and validate beliefs and assumptions. The Schematic offers team members a simple device for designing and validating designs for social processes and organizations — and, remarkably, validate or invalidate the assumptions of those designs the team has exposed, when they submit them for validation.

The effectiveness of each Team depends upon the exposure of numerous points of view on the same topic, which the Facilitator does with care and compassion. Though those points of view may remain after dialogue, each member has been exposed to those views and the assumptions behind them. *If a community is not operating with the same set of assumptions, and those have not been fully exposed and validated, social problems will surely arise in the future, if they have not already.* In this way we can come to understand why members judge and defend certain points of view. Concerning social sustainability, assumptions, opinions and judgments must be exposed in order to move forward toward the validation of designs the team has developed. As a whole community or nation moves toward becoming integral and whole, Design Teams pave the way toward social continuity and stability. The point of the team's work is to come to a convergence of assumptions, opinion, judgments, and beliefs about what they are designing.

Consultant. The Consultant has two main roles: **1)** Provide backup to the Facilitator. In a rapidly moving team process diversions may occur. If pursued too long they will lead the Team away from its productive course. Sometimes the Facilitator may also get caught up in this diversion. This is much like what happens on the ski slopes when going too fast – getting off track, into loose material, and getting bogged down. And, **2)** provide a “centering” function to the Team by maintaining a long-term perspective to the work of the team. Often the team will become too

focused on the immediate dimensions of their work and lose perspective of how their work fits into the scheme of societal sustainability in the order of 50 to 500 years.

An Early Summary

The work of the team will be challenging. Its examination of the sustainability of the old, traditional ways of life will put many assumptions and beliefs to a severe test. Our traditional ways of life were never designed for a global society that must accept the strain of moving into a sustainable existence, or succumb to societal decline. The work of each team is to hold the vision of a sustainable future, and develop reasonable, compassionate, and measurable staged developments for achieving that outcome.

Local Sustainability Design Teams provide an organized and predictable means for developing validated designs for social processes — major and meaningful contributions by local citizens to their immediate communities and to their city, state and national societies. Teams can use the Schematic and their team process for “visioning” sustainable designs for the future. Once the future vision design is validated, they can begin to develop decremental designs that fill in the blank spaces between that envisioned future and the today. Trying to achieve utopian outcomes in one step poses a ludicrous hoax on an uninformed public. Communities and societies now have the tools to consciously evolve socially through a staged evolution to move them toward social sustainability.

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A Workshop Introduction

If we were in a Workshop situation now, with the goal of experiencing the Design Team Process, we would engage the following exercise. We would begin by discussing the Schematic, the procedural framework for validating moral, ethical, and socially sustainable decision-making options and actions. What follows introduces the Workshop Exercise.

Because the four primary values of sustainability are universal to all people of all races, genders, cultures, ethnic groups, and nationalities, the synergism of the four primary values can empower the work of local Design Teams anywhere in the world. No central authority or control or overarching organization is needed to begin this process.

Remarkably, Teams inherently become a learning environment that will have community-wide and society-wide repercussions upon their populations. Individuals and families will become more fully aware of their effect upon their larger society to become morally responsible for their actions. The effects of social sustainability will become personal and societal.

Because of the universality of the values, sharing results between Teams, globally, will empower constructive change of older systems of social institutions and policies in all cultures and nations to become more universally and morally socially-sustainable. Developing moral designs of social sustainability is truly an ideal that requires progressive stages of designing and planning the programs that lead to sustainability. Once the plans are formed, an implementation team must devise developmental steps for implementing those plans that lead to greater and greater social stability with consideration for them to achieve moral sustainability.

The Design Team Process — An Experiential Training Exercise

This exercise will use three specific tools: The Design Team, Team Member roles, and the Design and Validation Schematic, (small illustration below, full size schematic on page 131).

SOCIAL SUSTAINABILITY DESIGN AND VALIDATION SCHEMATIC ~ Project: _____ p. _____

- GLOBAL STATEMENT OF PROJECT _____
- STATEMENT OF INTENTION (briefly): _____
- AREA OF SUSTAINABILITY: a. Social or b. Material? (Circle one)
- State the area of examination for social sustainability (e.g., family, childrearing, community, education, health care, economy, commerce and trade, governance, or other): _____
OR
State the question relating to material sustainability: _____

5. VENUE: → Individual/Family →Community →State/Region →National →Global Region →Global

6. CRITERIA FOR FULFILLMENT (This should be measurable) [We observe]	7. EXPECTATIONS (This involves planning) [We expect]	8. BELIEFS (And assumptions) [We believe]	9. INTERPRETED VALUES [We value]	10. INNATE VALUES
				LIFE
				EQUALITY
				GROWTH
				QUALITY OF LIFE
				EMPATHY
				COMPASSION
				"LOVE" OF HUMANITY

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The following is an experiential exercise that will take 2-6 hours to complete in a workshop situation. In an experiential exercise as this there are no mistakes — you learn by doing. After an hour, your team may feel that “something is just not quite right.” If that is the case, stop, examine what is happening and make adjustments.

Please form into Teams with 5-11 people. Do your best to develop teams with as much diversity with regards to age, race, gender, professional and educational background, etc. [The assumption for having diversity is to bring a very diverse set of beliefs, opinions, and assumptions into the Team for discussion. There is a *caveat*: great diversity could also become a great impediment to the smooth and rapid development of agreement.

It really all depends upon the individual team member's willingness to see and seek universal commonalities in the team's project of inquiry.]

Initiating the Team. Although there is no leader of your new team, usually someone will take the initiative to bring potential members together into a team. This is good — someone has to initiate the process.

Choosing Team Roles. The Initiator briefly discusses the function of each role within the Team and also the training and/or experience each of the members has that is applicable to selection for the various roles in the Team. With some effort, the team will soon perceive who has capability or even expertise in the roles of Facilitator, Recorder, Consultant, and Inquiring Members. After your first session together, you may want to discuss whether changing roles may be needed.

NOTE: Your immediate work is to select a Recorder even before you choose a Facilitator. This is necessary because almost immediately the Team will begin to experience “lost lines of inquiry” in the discussions. (See “Recorder,” p. 31)

Facilitator. The person selected for this role will begin to perform his or her duties immediately after selection. You are cautioned to be flexible at the beginning and as non-intrusive as possible. Do not over-facilitate. Just watch, observe, note, and in time make facilitative suggestions. Becoming too involved too early will stymie the forward movement of the Team. It is important that each team member be given space for taking responsibility for his or her words and actions.

Inquiring Members. The most active members of the Team are the “Inquiring Members” though every member must ask questions. Their role is to aggressively probe, prod, and dig into the topic by directing questions to the team to dissect and discuss.

Goal. The goal of your Team is to: 1) fill out the Schematic as completely as possible; and, 2), write a “Statement of Findings,” if possible.

✱ **Caveat:** For training purposes, it is not necessary for the team to complete the project as it is to thoroughly understand and appreciate the Team Process. This means becoming comfortable with the operation of team roles and with the dynamics of interplay of individuals engaged in the team process involving the art of inquiry as you work the Schematic.

Development of Topics for Teams. Because of the limited time of the Workshop, teams should quickly select a topic of general interest. Spend only minimal time determining your topic. If the team gets bogged down, ask the Facilitator to assist in determining your topic. Discuss some topics you would like to work on to validate their social sustainability.

- a. This can either be a “VISION Statement”; or,
- b. The examination of any topic; or,
- c. Deconstructing an existing social policy, law, or existing social organization, for example. If the policy is a single statement, it will fit the criteria of a design topic that can be tested in the Schematic. If not, it will need to be divided into smaller parts so that each can be evaluated.⁷

The topic. Every topic will fit into a hierarchy: The global aspects of your sustainability project, a mid-range, and the specific topic you will be working on. If your team is unable to reduce the project to a workable size promptly, the team can later reframe the topic as the team progresses. For example, look at the health care system and break it down as follows: sustainable global healthcare system; sustainable community healthcare system; sustainable local clinic; sustainable home healthcare.

Design / Creation vs. Implementation. During this creative process of developing designs that you will test for sustainability, do not become

⁷ NOTE: “Deconstructing” or testing the validation of a policy can be as simple as examining an Human Resource (HR) policy in your company: a) In #1 Global Statement of Project, you would write, for example, “Validate HR Policy #___”, and then in “Criteria of Fulfillment” you would write in the specifications of that policy. Next, proceed to “Expectations” where you would want to answer this question, “What expectations would require these criteria?” Then proceed to “Beliefs”, and answer this question, “What beliefs would support these expectations and criteria?” And finally under “Values” you would test each belief, expectation, and every criterion against each value, and write a very brief Statement of Findings of your test(s). “Values” in the Schematic is the point where careful discernment is needed to separate “interpreted values” from the seven universal and timeless innate values.

concerned with questions as, “How will the local sustainable clinic be financed?” Answers to questions as these and others will need to be raised when your team or someone begins the implementation process of your Team’s validated designs. Such considerations may include the size of the population the clinic serves, such as a community clinic for all age groups or that of a clinic on an aircraft carrier, for example.

Stop the Process. After about 1 hour, Facilitators should bring the Team to a stop and ask the team members how they think the team is doing. Checking with members on the Team Process is a way of “auditing” ‡ the unspoken observations of team members.

‡ Don’t hesitate to ask members if they are using reflective thinking, critical thinking, and “the observer-self.” (Page 23.)

Checking In and Reporting. The workshop facilitator will stop the teams every hour or two to report to the larger group. As this is an experiential training exercise where we learn by doing, where everyone’s learning becomes more complete in a shorter time by sharing the experiences of each team with the other teams.

Experience and Training. As team members gain experience performing their respective roles within the Team, they begin to realize that each could become immensely more productive and confident with just a bit more training. Team process, team dynamics, team facilitation and many related topics have been meticulously researched by social scientists for the last 60 years. There is a great deal of literature and training available or support the effectiveness of the team you will initiate in your own local community.



3

A Framework for Proactively Validating Moral, Ethical, and Socially Sustainable Decision-Making Options and Actions

The universal nature of the four primary values, (life, equality, growth, and quality of life), lend themselves to redesign all social organizations to contribute to social sustainability in any society. A unified theory of human motivation, described on pages 69, provides a universal means of understanding how to design child care to elder care, for example, and all of the social processes, organizations, social policies and laws in terms of social sustainability that affect everyone in the duration of their life from cradle to grave.

As powerful and universal as these values are their usefulness only becomes apparent when they are used with a methodology that incorporates them in the design of social processes, organizations, policies, and laws to name only a few. As explained earlier, without a methodology, their usefulness is much like trying to devise a compass by writing the words “North,” “East,” “South,” and “West,” on a round piece of paper and then expecting to use it on a sailing ship to find your way to some destination.

The mechanism for applying those values to social institutions is the *Social Sustainability Design and Validation Schematic*. Using the Schematic offers a proactive means for encouraging individuals and social organizations to seek options, make decisions, and take actions that are validated by each value and their combination to support social sustainability. In a sustainable society it is not enough to be a “good citizen.” “Good” is relative from one culture to another. What is necessary in a society that is moving toward social sustainability is for each citizen to generate decisions and actions that proactively contribute to the social sustainability of that society. Organizations, agencies, and institutions likewise must proactively seek options, make decisions, and take actions that support the social sustainability of the people they serve in order to

assure their own sustainability. Social sustainability then becomes a social symbiosis between individuals and the organizations of their society.

As a learning device ⁸, the Schematic offers a workable antidote to the “fragmentation” that David Bohm ⁹ writes about in his book, *On Dialogue*. Fragmentation occurs because of the misunderstandings about the beliefs people hold for any topic. Dialogue, as Bohm defines it, exposes beliefs and assumptions that individuals may have. When they are not exposed, misunderstandings occur leading to fragmentation in the dialogue. Because fragmentation can occur very easily, the methodology of the Schematic requires the team to diligently examine their beliefs and hidden assumptions. The Schematic answers that most pragmatic of all questions, “What works?” ¹⁰ to support social stability and social sustainability. The Schematic is capable of revealing the presence of unproductive beliefs and their underlying assumptions.

Using the Schematic and the practices of disciplined dialogue give members an opportunity to compare and reframe erroneous beliefs and assumptions. This is a vital process of the team: If their assumptions are not exposed but simply included in their designs without validation, then it is very likely the designs will be flawed and eventually fail.

About the Schematic, Also Called the Moral Compass

The methodology of the Schematic is much like using building and construction codes. They can be used to 1) upgrade existing structures to become code compliant, and 2) design new structures according to code. The Schematic can be used two additional ways: 1) to validate existing social processes, practices, policies and laws, and the design of organizations and institutions as being up to the standard of social sustainability, and 2) to create new, sustainable designs for social practices and institutions, for example.

The Schematic and the Design Team. The Schematic’s usefulness is its capacity to develop clarity in fundamental beliefs and their underlying

⁸ Senge, Peter M., *The Fifth Discipline, The Art and Performance of the Learning Organization*.

⁹ Bohm, David, *On Dialogue*

¹⁰ Wright, Kurt 1998. *Breaking The Rules, Removing Obstacles to Effortless High Performance*.

CPM Publishing, Boise, ID ISBN: 0-9614383-3-9

assumptions. It is particularly useful when team members are working on social questions where opinions may run rampant. It ensures that all team members have common, transparent beliefs and understanding about what they are talking about and doing.

Because of that capacity, the Schematic is an excellent learning device for identifying and then examining our beliefs and assumptions. It also reveals the matters we neglected to take into account that typically form the source for errors, mistakes, and inferior performance in failed projects.¹¹ The methodology of the Schematic allows the Team to develop designs for a social process and social institution that are validated against the four primary values of social sustainability. That is, the Schematic is useful for determining ahead of time whether social processes, organizations, institutions, social policies, and laws actually have the capability of contributing to socially sustainability. “Trial-and-error” becomes quickly observable while developing the design.

Using the Schematic in a team setting is an ideal place for citizens in local communities to learn about their individual and common beliefs and assumptions, and then design sustainable policies and organizations that are supported by socially sustainable (validated) beliefs and assumptions. As teams proliferate over time, it is expected that socially sustainable beliefs and assumptions will form the foundation for culturally consistent societies regardless of the diversity of ethnic and other subgroups of those societies. Because everyone wants to live in a stable society for the long-term, the Schematic and Design Team Process provide individuals in their local community with the opportunity begin that process by using this consistent methodology with predictable outcomes.

Conveniently, when the Schematic is used and the topic is validated by the seven values of social sustainability, that validation is synonymous with the topic also being validated as morally socially sustainable. Yet, if we need to validate a social issue, social policy, or law as being socially sustainably moral or not, then we can also use it as a *Moral Compass*.

¹¹ Dörner, Dietrich. 1996 *THE LOGIC OF FAILURE, Recognizing and Avoiding Error in Complex Situations*

Because the methodology for the Moral Compass is almost identical to that of the Schematic, the abbreviated Experiential Exercise for the Moral Compass follows the Experiential Exercise for the Schematic.

Methodology of the Schematic, An Experiential Exercise

(A completed Schematic is provided on page 123.)

1. Global Statement of Project: This is the kernel of the sustainable social project you plan to design. For this experiential exercise we will write, **“Reduce Teen Pregnancies, ages 12-19.”**

2. AREA OF SUSTAINABILITY: For this exercise, circle **“a. Social”**.

3. State the social project being designed for sustainability. For this exercise, the topic is: **“Child bearing.”** Also, write this in the top line as the **“Project”** of the Schematic. It is duplicated here for future reference as you accumulate pages of the Schematic in a folder, for example. Number the pages consecutively.

4. Venue: Circle: **Individual/family level.** Later, you can scale-up your design to the community level or higher once you have completed and validated the design for the individual/family level. For the sake of this example, it is easier to select the “individual/family” level because an individual/family is sovereign in how it chooses to practice its own sustainable population.

5. Statement of intention? This is directly related to (1.) “Global Statement of Project.” According to our example, we write **“Decrease abortions”**. Our *project* is to reduce teen pregnancies, and our *intention* is to reduce abortions.

6. Criteria for fulfillment: (Columns 6 and 7 are directly related to each other.) For every expectation, there are many criteria, behaviors or outcomes that fulfill that expectation. If we *expect* to reduce teenage pregnancies, then we need to have criteria to measure the progress of the programs we use to make that reduction. To check the validity of a criterion, measure it against the seven values of sustainability in column #10. For social sustainability to become a part of a community or society there must exist measurable behaviors or outcomes that demonstrate how expectations are being fulfilled.

Column #6 will become a list of measurable criteria that allows us to assess our progress to fulfill our project (1.). Letter each criterion as “a”, “b”, “c” and so on to provide a referencing guide in columns “7. Expectations”, “8. Beliefs”, and “9. Values.” List as many criteria as you can before proceeding. In our example the following are provided:

- a. Fewer incidents of pregnancies for girls 12-19.
- b. Lower school dropout rates / More graduations.
- c. Fewer abortions for this group (reported/projected.)
- d. Fewer welfare & WIC enrollment for this group
- e. Fewer reported abandoned infants.
- f. Fewer infants put up for adoption.
- g-z. Add criteria as necessary to measure your project.

Provide details for each lettered entry to let the reader know how each criterion will be measured; and, other details as needed.

7. Expectations Column: This column has to do with the program(s) that we *expect* will fulfill the criteria. In this example we would *expect* that in order to reduce teen pregnancies, those who become responsible for pregnancies and births of teenagers 12-19 years old would be provided a combination of programs to fulfill the criteria. “Those who become responsible” would include the teenager (boy and girl), his and her parents, and community support agencies, for example.

We would expect that...

- Procreation education programs would have been provided long ago to the parents of the teenager, and long before the teenager becomes sexually active. This prepares parents for socializing, instructing, and enculturating their future teenager with an understanding of the seven values, beliefs, and expectations so the child is prepared to make responsible decisions concerning his or her own sexuality and his or her procreation of a new generation. It is essential that the sexually developed child fully appreciate the consequences of their decision upon the social sustainability of their own life, their own eventual children, and upon the community and society.

Age-specific and developmentally-specific procreation education materials are provided to the parents or guardian of the young

child who will become a teenager, whether male or female. This would be done early enough in that child's life to answer their natural questions about reproduction, why there are boys and girls, and other topics.

This column can be expanded to provide programs as needed for each criterion. For example:

- Beginning prior to when the child becomes reproductively capable, the child is made aware of human sexuality in ways that are suitable for their age and sexual development. This may include the full spectrum of birth preventative methods from abstinence to sterilization. Those who are capable of reproduction are provided with no-guilt access to birth control devices and medications; and for those who are not yet capable of reproduction, information about those resources is provided.

As the reader may consider, this technique of information, education, and training can as easily be used for the prevention of tobacco use, drug and alcohol use, anti-social behavior including bullying, peer pressure, and many other behaviors that are detrimental to social sustainability. Procreation education in a sustainable society is viewed as any other developmental topic, like acne for example, that inevitably appears in a child's life.

* The thrust of the programs in "Expectations" is to place the responsibility for social sustainability practices upon the individuals who have the most influence to effect a sustainable outcome. At present society is responsible for the support and care of infants-becoming-adults by citizens who had no control of the procreation of that child. That is blatantly un-sustainable.

8. Beliefs Column: The lettered items in this column correspond to the lettered items in the Expectations and Criteria columns. This is usually the column where the Facilitator can expect differences between what each team member believes about their expectations listed in Column #7. In the first sessions of a team that is dedicated to learning about the nuances of the Design Team Process, the Facilitator will need to ask team members to be patient with each other as they explore the reasons and assumptions that support their individual beliefs.

After the Team has gone through this process of validating each and every belief and assumption several times, the members will soon understand the inherent integrity of the seven values and will quickly come to question their own beliefs and interpreted values in order to understand how they came to hold those beliefs and assumptions.

9. Interpreted Values Column: The examination of beliefs/assumptions will also become an examination of each team member's Interpreted Values. If each team member would keep an ongoing log of their own criteria of performance, expectations, beliefs/assumptions, and interpreted values for a particular topic, they will soon see how their personal decisions have been interpretations of the seven innate values. Once that "ah-ha" moment arrives, the team member will be able to challenge their own beliefs/assumptions more easily, and the progress of the team will begin to move along more easily.

10. Innate Values Column. Now it is time to cross-check or validate the items in the Interpreted Values, Beliefs, Expectations, and Criteria Columns against the seven Innate Values listed in Column 10. Validation requires that each of the listed beliefs (and each assumption) is supported by each value and their combination.

11. Statement of Findings (not illustrated). The Statement of Findings provides a place to write narrative conclusions that recount the validation by each of the seven values for each belief, assumption, and the criteria that are examined. This is an essential historic record as to whether the Team found the elements supporting the topic as either sustainable or unsustainable. Only Design topics that are validated are used in the final sustainable project.

Example: Because all humans are sexual by gender, and sexual according to their physical maturity; all people are *equally* endowed with sexuality, and *equally* in need of sexual and procreative information, education, and training in order to make responsible decisions about whether and when to procreate children. Delaying procreation until the optimum era of an individual's life allows the optimum contribution of *growth* to their *life*, and to their child's *life*. Further, it is the responsibility of their society to make available that education as well as birth control devices and medications to reproductively capable individuals; and, it is the responsibility of

reproductively capable individuals to avail themselves of those educational materials, birth control devices, and medications. These reciprocal responsibilities support the symbiotic social sustainability relationship of the individual, social agencies, and society.

As you can see, the Statement of Findings shows the relationship of the various columns of information in a brief narrative form.

The Schematic allows users to develop socially sustainable social policies for themselves, their own procreative family, and their community. Working the Schematic provides a synergistic effect that provides educational awareness and understanding of how social sustainability contributes to the individual's, family and community's sustainability.

Failure to Validate. Sometimes a social issue is not supported by the four primary values. If it is not possible to validate the topic, then it is necessary to write a *Statement of Invalidation* that is also published to avoid duplication by other teams. Teams will find, however, that some aspects of their designs are only partially validated. These need to be published, too.

Techniques for Working the Schematic

When it comes to the bottom half of the Schematic, columns 6-10, the Team can begin where it seems most convenient to start, though all columns will need to eventually be completed. If the Team decides to start with the Column #7, Expectations, you would *expect* to provide procreation information, education, and training only if you *believed* that doing so would bring about the fulfillment of the Criteria. You must then answer the question, "What leads you to *believe*, (Column #8), that doing so will be effective?" This and similar questions will lead the team to identify the assumptions of those beliefs.

As social sustainability is the final point in the continuum of survival for a civilization, only what supports a society's survival, existence, continued maintenance and sustainability is validated as important. The sustainability of a civilization, nation, or society is not dependent upon political positions, for example, but upon what truly affects its sustainable existence.

Our example continued: As we begin to work the Beliefs column, it is time for us to ask about the underlying assumptions we are making about procreation education in a socially sustainable society. **ASSUMPTION:** increasing availability of information, education and training to parents-to-be, parents of children, children, and reproductively capable young adults will decrease teen pregnancies and decrease abortions. Are there other significant beliefs and assumptions?

- *We believe* that all sexual beings should become aware of their sexuality as an aspect of their humanness. *We believe* that this is best provided by the parents or guardians of the child, as a part of growing up. *We assume* that parents have this information already. Ignorance of the basic functions of human procreation and reproduction contributes to social UN-sustainability for the individual, family, community, and global civilization.
- *We believe* that it is essential that children-becoming-adults are fully informed about their sexuality in order to make mature, responsible, and socially sustainable moral decisions about their reproduction. Increasing awareness must keep pace with their physical development — educational materials relating to a child's physical, sexual, emotional and social development.

Beliefs. Start with a belief you wish to test for its sustainability and write it in the Beliefs column. Look to the right to the Expectations column. What expectations stem from this belief? Write those down. As you can see, it is not always necessary to fill in all of the blanks of a Schematic to test for the validity of a belief, or expectation. To test the validity of a belief or expectation, you must challenge that belief or expectation using the seven values. If it is not supported by all seven values, then it is not validated.

Expectations. This is the other location where you can begin testing. Enter the expectation. Look to the left to the Beliefs column. What beliefs support this expectation? Write those down, and continue.

Validating an Existing Policy or Sustainability Project. Start with a policy, any policy whether it is a family, community, social, corporate, national, international domestic or foreign policy. Or, you could begin with a Sustainable Design feature you wish to test. Is it sustainable and effective? Write this policy or Sustainable Design feature in Column 7, Expectations. Examples may include mandating that health plans provide

free contraception *to reduce unwanted pregnancies*, or restricting visitor access to a state park *for habitat recovery*. In this case, each Expectation (policy or Sustainable Design feature) must be tied to a particular intention.

Look Left

1. What Criteria would you use to measure whether the policy or Design feature works as intended? Write the Criteria for Fulfillment you have identified in Column 6. Using the above example on restricting visitor access to a state park, we might use the population of a recovering and endangered species over time as one of the Criteria for Fulfillment.
2. If the policy has been in place for some time, data for the Criteria for Fulfillment may already be available so you can evaluate whether the policy is effective or not. If it is a new or proposed policy, or a feature of a Sustainable Design that will be new to society, then recognize that you will not be able to validate its effectiveness at this point, but will have to wait for it to be tried somewhere for a period of time to measure its effectiveness. It may be validated by the four primary values, but its effectiveness may not be apparent, yet.

Look Right

Beliefs have moral and ethical connotations. They are ideas about how an individual or society should behave that many times are not recognized because they exist in the form of assumptions. When evaluating a policy (or Sustainable Design feature), there are often competing views on its merits and demerits. Each party will have one or more underlying beliefs, whether recognized or not, which motivate them to be in favor or against that particular policy.

1. Start by identifying the parties in favor or against the target policy or Sustainable Design feature. In the example above on mandating that religiously affiliated health plans provide free contraception, we might identify religious institutions and the federal government as parties who have competing views on this subject.
2. For each party, try to identify what underlying belief is motivating them to be in favor or against the target policy. In the above example, religious institutions may be against the policy because they believe that freely available contraception will lead to immoral behavior. The federal government, on the other hand, may believe that individuals must have

access to family planning methods to reduce welfare costs. Place each belief in Column 2 along with its respective owner.

Evaluate each belief against the *interpreted values* contained in Column 9. This part requires seasoned judgment to use effectively, and not everyone will agree on the socially sustainable conclusion. However, even if no clear-cut answer that everyone agrees upon is achieved, using the Schematic will have served a valuable function in focalizing discussions around the topic of social and material sustainability so that constructive dialogue develops. Using the three secondary Value-Emotions should bring final clarity to the dialogue.

Exploration Tactics of the Team

There are three primary techniques for using the Schematic. The first involves the process of *building* a socially sustainable design based on “visioning” some desired outcome, as a social process, organization, or policy in the future. Visioning necessitates *strategic planning* where short-term goals are developed to fulfill long-term goals. The second involves testing an existing social process, organization, institution, social policy or law to determine its validity as contributing to social sustainability, or not.

1. Visioning and Strategic Planning are planning techniques that allow us to develop a vision for what we wish to bring into existence through validated designs contributing to social sustainability. Using the Schematic for strategic planning allows us to develop long-range plans and then devise short-range plans that fulfill that vision. Once the future vision design is validated, then the strategic plan can be developed with incremental short-term goals that eventually complete the strategic plan and vision.

Though visioning offers the potential of developing validated long-term goals, developing short-term goals will be challenging. Planning and implementation must take into account unknown factors that will surely arise that must be addressed. In other words, the plans must be adaptive and flexible with all participants keeping the interests of the plans ahead of any political or social positions that may develop along the way. We must be patient with ourselves to design that future and keep in mind the universal values as the criteria for every step along the way.

Start with a larger concept and then divide it into smaller parts. The smallest unit of social sustainability to work with is the individual. You can never go wrong beginning at this level because the foundation of any functional and sustainable society is the individual/family. If your team begins at the large end of a project using visioning and strategic planning, it will eventually have to work its way back toward the narrow end to validate how that design/vision contributes to the sustainability of the individual/family.

A Macro Perspective. Begin small. Designing a sustainable local healthcare center is far more familiar to you than the larger topic of a global or national health care system, for example. You may find it interesting that a socially sustainable local community health center has the same rooms, equipment and staff as clinics now, but the intention for its existence and operation is vastly different. The same exists for education with its schools and classrooms. You may wish to work with a local health care center as a whole system, and then divide it into its smaller components to be discussed as separate sustainable systems of the center. Doing so, you would begin to see how healthcare as a whole is a system that must relate to other social systems, as education and the family, for example.

As example, if you are designing a sustainable local healthcare center, that vision is more palpable and familiar to you than the larger topic of a global or national health care system, for example. You may find it interesting that a socially sustainable local community health clinic has the same rooms, equipment and staff as clinics now, but the intention for its existence and operation is vastly different. You may wish to work with a local clinic as a whole system, and then divide it into its smaller components to be discussed as separate sustainable systems of the clinic. Doing so, you would begin to see how healthcare as a whole is a system that must relate to other social systems, as education for example.

You would do this before dissecting these into smaller parts, and this is what this whole process is about: taking a larger social system of a global civilization and discovering the subordinate systems that operate within the larger sustainable system. No social system is sustainable without related and subordinate systems being sustainable, as well.

This is a process that looks at a great deal of minutia in a very tedious fashion. If you look at a small community medical clinic and then use this

process to discuss the design of the functions within the clinic, you may find that you achieve more rapid results. You would want to particularly point that to procreative couples, who were planning 3-6 months beforehand to have a child, or perhaps 2, 3, or 4 years beforehand, and would like to prepare for that time. You would examine the educational services that your clinic would provide, and what staff member of the clinic would provide this, and who is the most skilled. This person may also have the dual function to be the visiting family practitioner, who would come to visit the family before and after conception and during pregnancy, and who would follow this family unit through the years ahead.¹²

According to the continuum, as the fetus matures and is born, other functions within the local clinic would need to be provided. Rather than having the clinic drive the services, the needs of human beings as physical, social, psychological, intellectual and spiritual beings would drive the design of those services.

You may find a tremendous frustration in your work with this design process if you think of providing service to the current population in your community. In your vision, you may be looking at demographics where one healthcare clinic serves a population of 500 or a 1000 people, with 250 families. As you look at the communities across a large city – such as Green Bay, Wisconsin – you might exclaim, “Oh, my gosh! We need to have 1000 clinics to serve a million people.” Thus, you would begin to think in other terms.

Designing a socially sustainable clinic that helps develop socially sustainable individuals may seem to be a narrow-minded approach as you look at the realities around you. While this may seem frustrating, keep in mind that this is only a design to serve the human need to develop a socially sustainable community; and, of course, one of the first places you would start is with healthcare and education, then multi-levels of services along the human social sustainability continuum into the elder years.

¹² *Call the Midwife* “Call the Midwife” is a BBC period drama series about a group of nurse midwives working in the East End of London in the late 1950s and early 1960s. The video series offers an excellent view of the duties and commitment that midwives and community practical nurses provided before “western medicine” became the dominant health care system. My own grandmother was a community practical nurse who would stay with families who were ill, cook, clean, and nurse them back to health.

Floundering and Finding Your Way Out. If you do not have a design that has some ideals to it, then you will flounder. If you think in terms of only serving the immediate public, then you will also flounder. If you get caught up in how to acquire the needed resources — “How do we fund this now?” — and so on, you will flounder.

With a vision, your projection is to not have these particular problems in the forefront of your minds, but rather what services do you need to provide, to develop a socially sustainable community for generations to come. Recent literature, for example, cites that some third world countries are providing and developing high-tech solutions to local problems without having to hire experts. There are intelligent people everywhere, and intelligent people read up on the materials available and figure out how to do what needs to be done with the materials and resources at hand. When you do it this way, then you become very inventive, very creative and you will find that you will then have local, enduring solutions.

2. Using the Human, Social Continuum, (pages 97), focuses the efforts of the team on the individual and his or her needs at any point in the continuum of his or her life to examine their physical, social, emotional, mental and spiritual needs at each stage of an individual’s life. Doing so, your team may address the individual’s educational and economic needs, as well as their capacity to make contributions to the sustainability of his or her family, community, state, and nation. When a team uses this approach, it will necessarily begin with the procreative couple who initiates the beginning of that new person. It follows along the continuum to the point(s) where the Team chooses to examine and design sustainable practices with the individual in mind, either within the family of origin or in a later era of the individual’s life.

3. Testing an Existing Social Process, Organization, Institution, Social Policy or Law for Validation. Testing an existing social process or social policy involves de-constructing the originating organizational documents, such as charters, constitutions, by-laws, or policies and analyzing their parts from the standpoint of validating their sustainability. For example, if you evaluate a legal statute or law, you would first look to

the expectations associated with it. List these in the Expectations column of the Schematic. If the statute or law provides a sanction for violation or a reward for compliance, list these in the Criterion for Fulfillment column. When you find assumptions, and you will, list them in the Beliefs column to validate them later when the team is working on the column.

Next, the Team would proceed to discover the fundamental beliefs that underlie the operation of the organization that support the Expectations and Criteria provided in the policy, law, or regulation. Some organizations state their beliefs in the early part of these documents, which are usually associated with its philosophy and intention for its existence. List these in the Beliefs column.

The last process involves the validation of the social sustainability of those underlying beliefs, expectations, and the desired performance that measurably fulfill those expectations. If the policy, law or regulation does not support *quality of life*, *growth* and *equality* of the individual, family, other social organization/institution, or society, then it is not validated to support social sustainability. When a policy, law or regulation, etc., is unable to be validated as supporting the three primary values of social sustainability, then it must be revised and replaced by one that does, or is removed.

Values, Beliefs, and Assumptions in More Detail

Please note that dialogue as a process is far different from conversation and discussion. Dialogue in this sense is that unique exchange of thought among several people that seems irresistibly connected, as though without separation, yet allowing the unique contribution each person has to offer. “The discipline of team learning starts with ‘dialogue,’ the capacity of members of a team to suspend assumptions and enter into a genuine ‘thinking together.’” “Team learning is vital because teams, not individuals, are the fundamental learning unit in modern organizations. This [is] where ‘the rubber meets the road’; unless teams can learn, the organization cannot learn.” (Senge, 1994).

Values form the base of our behaving, speaking, and thinking that we express in our lives and how we live them. They are fundamental to who we are.

Beliefs. To say “values” is to also say “beliefs” because if we value something then we *believe* those values must be expressed in our lives. And, we further *expect* those who hold those same values and beliefs also behave as we would. Yet, beliefs and expectations can vary greatly between people who hold the same values. Why?

The reason they diverge so greatly is that while values are universal, beliefs, opinions, and assumptions are cultural, familial and personal. Behavior may vary from one person to the next and from one society to another, even though they hold the same beliefs because of underlying, unexposed assumptions. When you see inexplicable differences as this, look for unexposed assumptions. Then it becomes time to ask that all important and revealing question, “If we hold the same values, why are our beliefs and our expectations for fulfilling those beliefs so different?” That is the time for engaging effective dialogue techniques.

Validating Our Beliefs. Caution — Don’t get caught up in the “how” question or the “why” question. For example, “How could you, or ‘Why did you...? come to that belief from that value?’ ” will lead you into numerous rabbit holes of speculation. The “why” and “how” questions are not very useful. Rather, it is far more useful to work through each belief by discussing “what” led you to that belief. Examine them without judging them as good or bad, or referring to the individual from whom they came. Further, this can be done easily in a team where you feel safe emotionally and socially to ask questions that will help reveal assumptions. For example, “When did you first begin to hold this belief/opinion/assumption? From whom did you hear this belief/opinion/assumption? And so on.

Within the Team, when differences of beliefs are discovered, it will become necessary for its good working order to examine those beliefs to determine how they contribute to the sustainability of our civilization, national societies, communities, family, and ultimately the individual — not just for this year, but as they contribute to the development of sustainability 50 to 250, and 1,000 years ahead. Yes, 1,000 years is not too much to contemplate. That is why when you think of sustainability, think at two levels, the ideal envisioned future outcome, and the developmental steps that must be implemented to attain that ideal outcome.

Validating Assumptions. Failure to reveal and validate assumptions, either by overt agreement or tacit agreement, will invalidate the results of the Team. Every difference of a belief is evidence of assumptions that must be validated separately through the Schematic as supporting or not supporting social sustainability. When differences still persist, it is time to call upon your Consultant for insights and advice. This may seem tedious, but is a preventative procedure that will go a long way to eliminate unforeseen problems and failures of eventual designs. Documenting the validation or invalidation of assumptions will be useful to other teams as they examine similar designs. Differences between the validated results of different teams are indicators that unrevealed assumptions still exist.

We tend to live our lives minute-by-minute and day-by-day with incredible lists of beliefs in mind, never thinking of the unexposed assumptions that support those beliefs. Most of us simply accept the assumptions and expectations that were tacitly attached to those beliefs when they were given to us as children. It is essential for the development of sustainable social organizations that their fundamental beliefs and assumptions are exposed and validated.

“Everything is Fine.” The development of hundreds of local Design Teams will be able to examine the fundamental assumptions that underlie the social systems of our society. Assumptions are the soft sand that is quickly eroded when tragedies wash across communities and nations. David Bohm tells us,

“When things are going smoothly there is no way to know that there’s anything wrong — we have already made the assumption that what’s going on is independent of thought. When things are represented, and then presented in that way, there is no way for you to see what is happening — it’s already excluded. You cannot pay attention to what is outside the representation. There’s tremendous pressure not to; it’s very hard. The only time you can pay attention to it is when you see there is trouble — when a surprise comes, when there’s a contradiction, when things don’t quite work.

However, we don't want to view this process as a 'problem,' because we have no idea how to *solve* it — we can't project a solution.”¹³

The biggest assumption that amounts to a grand societal lie is that “Everything is fine.” The *Social Sustainability Design and Validation Schematic* has an uncanny knack for exposing assumptions of team members, their communities, and the assumptions of our culture, larger societies, nationally and internationally. But it takes courage to begin. Perhaps the biggest untested assumption I've made is that the citizens of democratic nations are concerned about their future, and will become engaged in designing a sustainable future for their children and grandchildren. But then, perhaps they only see that “everything is fine.”

Summary

While most citizens will agree upon the seven values of social sustainability, what emanates from them in the form of beliefs seems to always vary in any society depending upon their racial, ethnic, cultural, national, political, religious, and sexual orientations. But, for a community or society to become socially sustainable into an indefinite future, all beliefs and assumptions must be validated by a Values-Beliefs-Expectations-Criteria examination to answer the primary question, “Do these beliefs (policies) work? Do these beliefs and their assumptions contribute to the sustainability of ALL individuals, families, communities, and societies?”

Never before has any society, culture, or civilization been challenged with the capability of designing its own sustainable destiny. We have learned only so slowly that when citizens are sustained, their nation is sustained. The work of Jared Diamond in *Guns, Germs and Steel*, and his later book, *Collapse*, points clearly to the necessity of public and organizational policies that intentionally support the social sustainability of citizens, families, communities, and the larger society.

Relying upon traditional top-down social and political management and governance practices is no longer sufficient to solve social problems or even delay the inevitable. They are no longer sufficient to lead our

¹³ Bohm, David *On Dialogue* (2004): 68.

people and move our communities and nations into social sustainability. Further, the traditional model of democracy is too slow, too stubbornly invested in established positions, rather than being adaptive and flexible.

Radically new but familiar social processes are needed to consciously create the sustainable future we hope to live in. What is required is an Internet system for training millions of citizens simultaneously via experiential training and educational simulation programs for designing sustainable social processes in a Design Team environment. Connecting via public media, citizens would soon see the value of their work as supporting the sustainability of their family and their communities.

Because the seven values are universal to all people of all cultures, nations, ethnic groups and racial composition, the synergism of those values and the Schematic can empower local Design Teams anywhere in the world to validate the contribution of their designs. No central authority or control is needed to begin.

Caveat – Patience is required. History demonstrates that it takes many decades, even centuries, to build a civilization, but only years or decades to decline and even collapse. Building a *sustainable* global civilization will require conscious and deliberate intention to initiate, and may take decades and centuries to complete — that and an awareness that social change will be a constant annoyance until then.

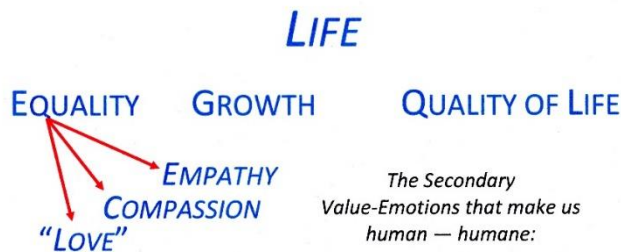


4

Values, Human Motivation, Ethics, and Morality

The factor that pulls the Design Team Process into an integral system and gives the Team's results validation are the seven values that are innate to Homo sapiens. Because values always underlie all decisions, the best values to use are those that are native to humans and have a proven record of their consistent effectiveness for sustaining the survival of our species over the course of over 200,000 years.

SEVEN VALUES HAVE SUSTAINED OUR SPECIES' SURVIVAL



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"Love and compassion are necessities, not luxuries
Without them humanity cannot survive."
— Dalai Lama

The illustration above shows the seven values and their relationship to each other. They are integral to each of us and give us the capability to make decisions to become complete as a person and offer us the means to have a positive and constructive relationships with others. They exist in every person of every race, culture, ethnicity, nation, and gender.

These values occur in two sets, four primary values and three secondary values as illustrated above. They, again, are fundamental to moral and ethical decision-making. Because morality and ethics are not innate and hereditary, they are learned, and must be taught by example in the process of enculturation and socialization by parents, or taught by another

social institution. In the following text, these values provide the basis for a proactive morality and ethic. That morality and ethic provide positive and constructive instruction for living peacefully, and offer the capability for families, and communities to become socially stable.

Discovery of the Seven Values

In late 2007 several inquisitive neighbors who had been following my work on social sustainability and the Design Team Process proposed that we initiate our own local Design Team. The intention of our experimental team was to discover the link between beliefs and expectations for intimate relationships that ended in disappointment. Our first line of inquiry began with the end result, disappointment. It was fairly obvious to all of us that somehow the person who was disappointed had expectations for the relationship that did not match the expectations of their partner.

Next, we tackled beliefs because if we hold certain beliefs about some topic, then we expect certain results will come about when we apply those beliefs. Obviously, again in the intimate relationship, those beliefs did not support the expectations that resulted in disappointment. What we did not know at the time was the possible presence of ASSUMPTIONS that almost always underlie a belief or system of beliefs.

Knowing that values always underlie beliefs¹⁴ and our decision to act on those values, we began an inquiry about values. It took several weeks of weekly team sessions to discover the essential values of intimate relationships. After we got bogged down with poor results, we shifted our inquiry by weighting those values as to their importance to all people. We wanted to find the commonalities of the values for all people because relationships, whether intimate, social, business, or work, always seem to carry the risk of ending in disappointment.

¹⁴ Please see the “Schematic” on page 123. Follow the progression from column #6 “Criteria for Fulfillment” (results) of your Expectations in Column #7, Beliefs in Column #8, Interpreted Values in Column #9, and onto Column #10, Innate Values. This progression leads us to understand that our beliefs are personal expressions of our Interpreted Values that we act on to make decisions. The knowledge that “values always underlie our belief systems and our decisions” is a recital from clinical psychologists to business consultants and gurus. It is a truism that aids our own personal investigations to understand our mistakes of judgment and decisions we have made in the past.

In this approach we started with *LIFE*. It is important to all people. But after the self-evident nature of life as being important, we could not proceed, as so many other values related to life became evident, but seemed unrelated. After one of our later sessions with little progress, and as I stepped away from our social time together after the team session, I had one of those remarkable “Ah-ha” moments of insight where it was very reasonable to know that equality, growth, and an improving quality of life seem to be of paramount value to people. Those became the four primary values.

When we had those four values to work with, we began an inquiry among ourselves to see if those values were common to all of us. And, yes, they were and still are. We then assigned ourselves the job of asking our friends, associates, co-workers, and those in other nations that we already knew if they held these values for their own life. And, yes, these were common to well over 150 people who were asked.

The team eventually lost its zest because the work of the team made it very conscious to everyone how their own existent intimate and friendship relationships did or did not fulfill their expectations and their beliefs for those relationships. We disbanded in late spring 2008. What the team had begun became a full time avocation for me to understand the fundamentals of social sustainability. What began as an inquiry into the disappointments of personal relationships expanded as a personal inquiry to understand the disappointments in life from the personal to the international. The products of this inquiry include numerous papers about values, morality, ethics, decision-making, intention, and vision for relationships as well as for the organizations and social institutions that support a functional and sustainable democratic nation and society.

The secondary values of empathy, compassion, and a generalized Love for humanity were revealed to me in 2014 by a close friend who consistently wishes to remain anonymous. Without those three secondary values, my work of the last eleven years would not have come about. And, fortunately, the secondary values made it possible to develop a universally humanitarian morality and ethic.

One very helpful product that came out of those experimental Design Team sessions was a very rudimentary form of the Schematic, (page 131). It has proven its practical value over and over again to help team

members think in more rational and logical ways to discern problems and support their imaginative processes for creating solutions.

Characteristics of The Seven Values

Self-Evident

The self-evident nature of these values is only one of several *characteristics* that have obscured their presence while in plain sight. Once the four primary values are pointed out to people, their self-evident nature becomes as obvious as those stated in the famous sentence in the United States Declaration of Independence, *"We hold these truths (values) to be self-evident, that all [people] are created equal, that they are endowed by their Creator with certain unalienable Rights, that among these are Life, Liberty and the pursuit of Happiness."*

Universal

These values are also universal to all people of all races, cultures, ethnicity, nations, and genders. Ask anyone, whether they live in Bangladesh or Baltimore, Houston or Hanoi if they would like to develop the innate potential they brought into life and improve their quality of life with an equal ability as anyone else would or could. The answers are universally the same.

Innate / Timeless

Even though I cannot prove it, evidence seems to suggest that these seven values are innate to our species and have been embedded in our DNA from our earliest beginnings. They have motivated everyone to yearn for the improvement of our quality of life materially and socially.

Irreducible / Immutable

LIFE and the three primary values are the superordinate values of our species and are not subordinate to any other values. The pursuit of equality, growth, and an improving quality of life provide the foundation for human motivation as interpreted by the individual, and express themselves in a personal hierarchy of needs.

The Four Primary Values

The four primary values are remarkable because they constitute an innate “code of decision-making” that will produce consistent results regardless of who uses them. What makes this so consistent is that these values motivate people the same because almost all people are unconscious of the values that they are using to make decisions. The exception, is *LIFE*.

***LIFE* is the ultimate value.**

LIFE, along with the three primary values and the three secondary values create an integral *system of values*. Decisions made about *LIFE* are qualified by the other six values as the criteria for human decision-making.

Equality

Equality is inherent in the value of life — everyone’s life is valuable. We give equal value to each individual, and we would seek to provide more equitable opportunity to every individual to develop their innate potential, as we would our own. This is the value that empowers us to work together to improve our world.

A Caveat for the primary value “Equality.” The moral and ethical person is not naïve to assume that everyone else is moral and ethical. It is unfortunate that we live in a hostile social environment where we seem to be confronted frequently by those who have chosen to be NON-human.

NON-human is defined as someone who is incapable of empathy, compassion and a love for humanity. Non-human has two classifications. The first are those who do not have the physical, mental, or emotional capacity of empathy or compassion, or love for humanity. The second are

human predators, which may demonstrate as short-changing us at the cash register to the extreme of kidnapping, rape, and death of a victim. (See also page 81.)

Growth

Growth is essential for improving our quality of life. To be human is to strive to grow into our innate potential. Only a proactive morality and ethic has the capability to support the growth of others.

This value ensures that the inherent potential of individuals, societies, and a civilization becomes expressed and fulfilled, which encourages an improving quality of life for everyone. Without growth, there would be no possibility of social evolution and social sustainability.

Quality of Life

While life is fundamental to survival and continued existence, it is the *quality of life* that makes life worth living and gives life meaning. In a democracy, access to the *quality of life* is provided when a person not only has an *equal* right to *life*, but that person also has an *equal* right to *growth* as anyone else. This is what makes immigrants so excited to move to a democracy — they seek freedom to experience the *quality of life* that makes life worth living — to control their own destiny and to explore their innate potential with the opportunities that a democratic nation provides.

The Three Secondary Value-Emotions

EQUALITY → *Empathy, Compassion, and Love*

The primary value **Equality** is the source for the three secondary value-emotions. We know when equality is out of balance because of the secondary value-emotion of *empathy* – to “feel” or put our self¹⁵ in the place of another person and sense what that is like, whether that is in anguish or in joy. When we feel empathy for others, we want to act in

¹⁵ “self” as a single word is identified in this paper as our self-identity. It is distinguished from “myself,” “ourselves,” and similar usages to indicate the inner personality identity. d

compassion, to reach out to the other person and assist them in their situation. When empathy and compassion are combined, and we feel that equally for everyone, then we say that we have a Love for all humanity — the capacity to care for another person or all of humanity, as we do for our self.

Empathy, compassion, and Love support the development of a higher quality of life for our self and with others by providing the motivating energy to grow into a more complete, mature, and functional individual within our self and within our social environment. These values allow us to see the common good as societal rather than selfishly personal. Their expression demonstrates the highest ennobling qualities of human nature at its best. With these three value-emotions, we have the direction and motivation from which to develop highly positive family dynamics; and a loving, compassionate, and empathic means of validating holistic growth in individuals, families and societies.

When we consciously internalize the primary values and secondary value-emotions, we realize that the collective power of individuals affects individuals everywhere as much as the individual affects the collective whole.

Human Motivation

In order for members of the Design Team to create effective options for resolving social and organizational problems, they will need to know what motivates people to make the decisions they do. The seven innate values of humans are at the core of human motivation. Almost all people *do not* use those decisions directly in their decision-making but use their personal interpretations of those values to make their decisions. For some people their interpretations lead to wonderful outcomes, but for others their interpretations destroy the lives of others. For team members understanding the original cause of human motivation is central for devising socially sustainable solutions.

What is essential in the Design Team Process is that the members always keep in mind the seven values as the original cause of human motivation. Because of the unceasing urging of those values human motivation is always in operation. Together, these seven values provide us with a

unified, values-based theory of human motivation. Eponymously, it becomes the *Raphael Unified Theory of Human Motivation*.

A Unified Theory of Human Motivation. The synergism of the primary and secondary value systems gives us a complete picture, (page 69), of human motivation and an accurate reflection of us as individuals — thinking and compassionate. The four primary values and the three secondary value-emotions bring us full circle to provide the basis for a unified theory of human motivation by engaging the analytical-side of individual and social existence with the intuitive or heart-connected side of our existence.

We are motivated by our intellectual side to devise ways to improve our quality of life, whether that means discovering fire to heat our cave and cook our food to inventing the latest smart phone. We are also mightily motivated by what we feel from what most people call their “heart.” The secondary value-emotions give each of us the capability to improve the quality of our lives through our empathy, compassion, and “love” of humanity, both as givers to others and as receivers from others.

Further, these values give us the capability of improving the quality of our lives through our *intra-personal* relationship with our self; and *inter-personal* relationship with others. This is the point that the unification of these two value systems becomes vastly important to motivate each of us to explore our innate potential and find meaning in our life, to confidently unlock our potential, and aid others to unlock their own. The three secondary values connect us to others through our empathy to act in compassion to aid those in distress. In doing so, these values reflect that we are being fully human. Peace will never become possible until we become fully human in our intra- and inter-personal relationships.

These seven values have provided the motivating impetus to sustain of our species for 8,000 generations, approximately, and characterize our species as being human, humane. In other terms, the four primary values give us an integrated system of *moral justice*; and the three secondary values give us an integrated system of *humane justice*. The three secondary value-emotions give us the criteria to live our lives humanely in grace, to protect and nurture our self while we protect and nurture others.

This proactive, unified theory of motivation is the cause célèbre and impetus of the origins of democracy. Humans must be able to initiate their right of self-determination, which is inherent in being a human. In a democracy self-determination is expressed as freedom and tempered by the compromise of liberty, to consider to greater good in all of our personal decisions. Humans are designed to be free. Yet, in an organizational existence of society, that freedom must contribute to the family, community, and society of those people.

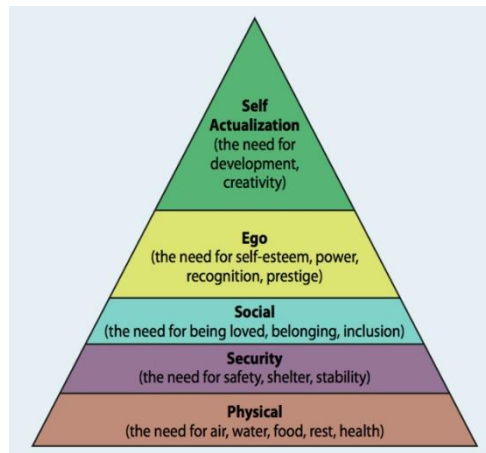
History has taught us that any limitations placed upon people, individuals, is the cause for much friction with those who place those limitations on them. And, that is the cause of insurrections, acts of sedition, rebellion, revolt, and revolution. Once the people have personally experienced the virtues of living without political restraint, then will never go back to an oligarchical, monarchical, autocratic forms of governance. And, herein lies the crux of contemporary democracies, as wealthy, politically powerful, and manipulative personalities seek to return to authoritarian forms of governance.

Is the Design Team Process concept important? Yes, of course. It is a foundational and traditional process that empowers individuals in their local community to make meaningful and effective contributions to the course of their community, state, and nation. It is an inherent, fundamental process of democracy that has been exercised for many centuries.

Values, Value-Interpretations, Hierarchies of Need And Social Change

The power of these seven values to urge us to live life as we interpret those values is also the original cause of social change. For team members, it is again essential to understand what motivates people to make the decisions that they do, and act as they do. An accurate understanding of human motivation provides the team with confidence

that the options for resolving the topic they are working on is not second guessing, but accurately reflect answers that have a real basis for effective implementation.



Primary to understanding the necessity for the evolution of societies, democracies, politics, and economies is to understand the “original cause” of social change that is everywhere around us. Causes of the incessant social, political, and economic changes that erupted in the 1800s and 1900s are the same causes that push social change today — fueled by our individual yearning for a better *quality of life*, to *grow* into the innate potential that we brought into life, and to *equally* enjoy an improving quality of life and to grow into our innate potential as anyone else. Those values, today, as then, are always waiting for opportunities to come into expression.

The motive power behind SOCIAL change. What we define as social change is the collective movement of vast numbers of people who are striving to satisfy their evolving *personal interpretations* of the values that have sustained our species. Those *personal interpreted values* provide the basis for an evolving *hierarchy of needs* described by Dr. Abraham Maslow. Dr. Maslow stated that as basic human needs are fulfilled more evolved needs become apparent to form a hierarchy of needs.

What drives the evolution of the needs Dr. Maslow describes are the values that are organic and innate to our species. Our hierarchy of needs evolve as our interpretations of our innate values evolve — we are still using the same value system as our ancestors did tens of thousands of years ago, but we interpret them in new ways. Collectively, as individuals

improve the quality of their life and grow into their innate potential as others do, they create social change through their “demand” for new avenues and new means to fulfill their evolving needs. Perceptive marketers strive to be in touch and in tune with the “demand” of the public to assess any changes in the market for the potential of new services and products.

While individual interpretations of the four primary values of social sustainability may vary wildly from one person to the next, vast numbers of people provide slow-moving, ongoing trends that stabilize the movement of a society over time. *Social instability occurs* when vast numbers of people sense that their ability to satisfy their needs is being threatened; and occurs rapidly and violently when they simultaneously sense that their ability is imminently threatened and there is no hope of preventing the threat.

“Everything is fine.”¹⁶ It is not surprising that most people in mature democracies assume that “everything is fine.” “Everything is fine” is *assumed* in the almost invisible slow creep of social change by most people who are easily distracted by the immediate events in their personal lives. Yet in only five decades, the macro-scale of social change in the United States has been immense. Its only evidence is how uncomfortable citizens feel with “the way things are” in Washington, D.C., other national capitals, and in their state and provincial capitals. When large numbers of the public sense and wake up to see that everything is NOT FINE, then social, political, and economic panic can cause rapid, large scale disruptions.

The motive power behind POLITICAL change. As vast numbers of the public sense that their current political processes do not support an improving quality of life for them, and do not promote the individual to grow into their potential, or support them to do both, those vast numbers become less and less satisfied with the status quo. In a democracy, citizens are used to exercising their right of self-determination in all things that affect them, including their government. They yearn for a return to the quality relationship their great grandparents had with their elected and appointed public executives.

¹⁶ Bohm, David 2004 *On Dialogue*: 68.

Moral and Ethical Decision-Logic of the Seven Human Values

For the Design Team, understanding the incessant urging of the seven human values for making decisions and taking actions that satisfy the personal hierarchy of needs is essential to understanding how to devise solution-options to the topic of inquiry. The second part, and socially essential part, of creating those solutions requires an understanding of the morality and ethics that emanate from those seven values. Because there is an inherent logic relationship between the seven values and their characteristics, the morality and ethics that emanate from those values and characteristics take on that same logic relationship.

The logic relationship of the seven values and their characteristics gives us the capability to develop “logic-sequences” for a proactive morality and ethic for each value. ¹⁷

Seven Values → MORAL DEFINITIONS → Ethics Statements → Expressed Ethics → TGoEE

- **Seven Values** underlie the decisions that have sustained the survival of our species;
- **Moral Definitions** provide us with a set of rules to guide human decisions and actions to prevent destructive life-altering behavior of human interaction;
- **Ethics Statements** tell us *HOW TO* fulfill Moral Definitions. Using “equality” as the originating primary value in this sequence example: Treating others as you would treat yourself means that you do not treat others less than yourself; and it also means that you do not treat yourself less than you would treat others. The value of others is equal to that of yourself, and your value is equal to that of others – think, speak, and act accordingly. The importance of this value is that others are not excluded from consideration, or from opportunities to grow and to improve their quality of life; and neither are you.

¹⁷ Raphael, Daniel. 2018. *Making Sense of Ethics — A Unique, Unified Normative Theory of Ethics, Morality and Values*.

- **Expressed Ethics** tell us *WHAT TO DO* to fulfill Ethics Statements. Expressed Ethics do not come into existence until we *integrate the four primary values with the three secondary values*. The four primary values exist to motivate our species to survive. The three secondary value-emotions exist to motivate us to be human — humane. Expressed Ethics clearly identify the place in the logic-sequence where *ethical principles* lie.

Ethical principles provide the ethical standards for corporations, governmental agencies, public and private agencies to conduct business without jeopardizing their personal and social integrity, to improve those relationships, and reduce their exposure to liability. As example, the *expressed ethical principles for “equality”* would include fairness, justice, integrity, respect, loyalty, truth, trust, accountability, responsibility, transparency, authenticity, and honesty.

- **The Graces of Expressed Ethics (TGoEE)** is the fifth stage in the logic-sequence that provide the *élan* of social interaction. These take the form of *being* kind, considerate, caring, confident, generous, meek, mild, modest, strong but humble, thoughtful, patient, tolerant, positive, and friendly for only a very few of many possible examples. These are not necessary to be moral or ethical, but provide a “grace” to ethical living. People who express these graces are always noticeable because they are not pretentious, but have a confident joy of life that cannot be ignored.

Now, let us begin to build logic-sequences step-by-step beginning with the *Moral Definition*. That step will lead us to *Ethics Statements* and so on from there. As always, we begin with values.

The Morality and Ethics of Each Value

Life

Proactive Moral Definition: Assign value in all of your decisions to protect and value life.

Ethics Statement: Protect and give value to all life. Take the life of other species only for your meals. Do not to take the life of species for sport, or to sell protected species.

Expressed Ethics: Acceptance, validation, patience, tolerance, forgiveness, and vulnerability, for example, are necessary to support the social existence of families, communities, and societies.

NOTE: The Graces of Expressed Ethics (TGoEE) apply to all values and are closely associated with Expressed Ethics. They take the form of *being* kind, considerate, caring, confident, generous, meek, mild, modest, strong but humble, thoughtful, patient, tolerant, positive, and friendly for only a very few of many possible examples. These are not necessary to be moral or ethical, but provide a “grace” to ethical living.

Equality

Proactive Moral Definition: Make decisions and take action for improving the quality of life and unleashing the potential of others as you do for yourself.

Ethics Statement: Treat others as you do yourself means that you do not treat others less than yourself; and it also means that you do not treat yourself less than you would treat others. The value of others is equal to that of yourself, and your value is equal to that of others – act accordingly. The importance of this value is that others are not excluded from consideration, and from opportunities to grow and to improve their quality of life; and neither are you.

Expressed Ethics: To appreciate Equality at the roots of our humanity that emanate from our DNA, Expressed Ethics tell us “what to do” at the most basic level to fulfill “Equality.” When we see the expression of fairness, integrity, transparency, acceptance, appreciation, validation, worthiness, deservingness, honesty, authenticity, faithfulness, discretion, patience, tolerance, forgiveness, nurturance, and vulnerability we are seeing the expression of our humanness at its very best that supports the equality of others, and our self.

Growth

Proactive Moral Definition: Make decisions and take action that create opportunities for you to develop your innate potential; and, whenever possible develop opportunities for others, and assist

them to grow into their innate potential to improve their quality of life as you do for yourself.

Ethics Statement: Assist others to grow into their innate potential just as you do for yourself. Show others, as you are able, to recognize the opportunities that may be of assistance to them to grow and improve their quality of life.

Expressed Ethics: Fairness, integrity, transparency, acceptance, appreciation, validation, worthiness, deservingness, patience, tolerance, forgiveness, nurturance, and vulnerability are a few that support the growth of others.

Quality of Life

Proactive Moral Definition: Make decisions for yourself and others that improve the *quality* of your lives.

Ethics Statement: See others as an *equal* of your own life to know how to support your efforts to develop their innate potential to *grow* to improve their *quality of life* as you would for yourself. When making decisions or writing policies and laws put yourself on the receiving end to see how you would react, and adjust the parameters of your decisions according to the seven values.

Expressed Ethics: Fairness, integrity, transparency, acceptance, appreciation, validation, worthiness, deservingness, honesty, authenticity, faithfulness, discretion, patience, tolerance, forgiveness, and vulnerability support the quality of life of others, and our self.

* Empathy (* = Secondary Value)

Proactive Moral Definition: Extend your awareness past your own life to that of others.

Proactive Ethics Statement: Extend your awareness past your own life to that of others to sense their situation in the seven spheres of human existence: physical, mental, emotional, intellectual, social, cultural, and spiritual.

Expressed Ethics: Extend your awareness past your own life to that of others to sense their situation in the seven spheres of human existence: physical, mental, emotional, intellectual, social, cultural,

and spiritual. Reflect on what you sense and compare that to your own awareness(es) of your own seven spheres of human existence.

All *Expressed Ethics* demonstrate “other-interest” contrasted to self-interest. “Other-interest” Expressed Ethics are typical of the secondary value-emotions. Self-interest is much more typical of primary values. We see the prevalence of this in the US culture with its great “me-ism” of self-centered arrogance manifested as authority, power, and control. Yes, primary values do have Expressed Ethics attached to them, but as we have seen, it is always a matter of personal choice of expressing self-interest, a little of both, or predominately other-interest. Neither is “good” or “bad.” “Other-interest” works toward social sustainability while self-interest works predominately against it, at least at the local, tactical scale of social existence.

* **Compassion**

Proactive Moral Definition: Based on our developed sense of empathy we choose to support the improvement of other’s quality of life and to grow into their innate potential, as we do for our self.

Proactive Ethics Statement: Based on your developed sense of empathy, take action to come to the aid of others, to support the improvement of their quality of life, and to grow into their innate potential equally as you do for yourself.

Expressed Ethics apply equally to the three Secondary Value-emotions because those Secondary Values act together. All *Expressed Ethics* demonstrate “other-interest” contrasted to self-interest that we see all too often.

* **Love**

Proactive Moral Definition: Love (noun) in the context of proactive morality is defined as the combined energies of empathy and compassion toward others, as you have for yourself. This is truly the most developed definition of equality — to see and value others as you do for yourself.

Proactive Ethics Statement: Love (verb), in the context of proactive morality, is defined as projecting the combined energies of empathy and compassion toward others. This is truly the most evolved definition of equality — to see and value others as you do for yourself, and choose to act accordingly.

Expressed Ethics apply equally to the three Secondary Value-emotions because those Secondary Values act together. All *Expressed Ethics* demonstrate “other-interest” contrasted to self-interest that we see all too often.

The Graces of Expressed Ethics

The Graces of Expressed Ethics apply equally to all Expressed Ethics because they are the natural outgrowth of Expressed Ethics as their name indicates. They are not necessary to be moral or ethical, but provide a “grace” to Expressed Ethics.

For example, Growth is a primary value. Proactive Moral Definitions tell us to make decisions and take action for improving the quality of life and unleashing the potential of others as you would for yourself. The Ethics Statement tell us **how to** “Assist others to grow into their innate potential just as you would for yourself.” The Expressed Ethics tell us **what to do**: Be fair, have integrity, acceptance and appreciation for that person. The Graces of Expressed Ethics add a qualitative “texture” to our personal interaction with others. The Graces suggest that *being* kind, considerate, caring, confident, generous, meek, mild, modest, strong but humble, thoughtful, patient, tolerant, positive, and friendly will go a long way to make that person feel comfortable with the challenges that growth always provides.

The “IF . . . THEN” of Building Logic-Sequences

Building any logic-sequence begins with the statement, “**IF** _ _ _ _ **THEN** _ _ _ _.” It begins with something we speculate to be true. When we create an “if-then statement” it must be checked for its validity to know if

it is PROVEN to be true, or not. Once it is proven to be true, then we call that statement a “PROOF” for that step in the logic-sequence.

As an example, from simple geometry, the “if-then statement” of a triangle is this, “**If** the ends of three lines are joined to create a three-sided object, **then** the sum of the angles is **always** 180°. The important final word in this logic-sequence is “**always**.” To validate this, we would measure the sum of the angles of dozens of different types of triangles anywhere in the world at different times of the day. The validation process provides us with a “proof” of the logic-sequence of the statement. Once the Proof is made, then we can use the Proof to build other “if-then statements,” and validate those proofs by actual measurements.

With the proof of the existence and characteristics of the seven values, we can build an integrated logical system of morality and ethics that will prove to be useful to anyone, anywhere in the world, now and into the far distant future.

Building logic-sequences (Moral Definitions) from the seven values begins with the statement, “**IF** the values do exist in everyone, **THEN** are there characteristics of these values also existing in everyone?”

To validate that “if-then statement,” we would then go out into the world and interview thousands of people from all over the world to determine if those values really do exist in everyone we interviewed. If that proves to be true, we would then develop a list of mutual characteristics for those values.

Characteristics of the Seven Values, (see page 66). Because that research has already been completed, we know the seven values exist in everyone in the world. Because everyone interviewed identified with those values, a list was made of characteristics for those values. Those characteristics include that they are *universal* to all people. From the written history of past societies and civilizations, we also know that these values are *timeless*, meaning that people have expressed these values in their lives from the earliest recordings of human history, and are the motivating values that sustained the survival of our species for over 200,000 years.

From our own personal experience, as well as our conclusions made from historical records, we know that these values are innate to our being ¹⁸ — and **not learned**. This suggests the seven values are embedded in our DNA.

What is remarkable about these values is that once they are pointed out to people, their existence seems so obvious that they are seen as being *self-evident*.

These values are also proven to be *irreducible*. That is confirmed when we challenge each value to discover if more basic values underlie each of them. Knowing that *values always underlie all decisions*, our question becomes, “What are the values that underlie *LIFE*?” Because you either have life or not, there is no decision to be made. We conclude that the value *LIFE* is *irreducible*.

Now, let us examine *growth*. What values support our growth? It, too, is irreducible because it is an unconscious urge of our species, not a decision, and is not learned. Growth spontaneously begins to express immediately when children are born. Within days infants begin to recognize faces, voices, and begin to babble in the process of learning to talk. Then comes crawling, standing, stepping, walking, running (and falling), then progresses onto learning the full scope of languages, writing, music, mathematics, and art.

As for *equality*, the conclusion is the same. We do not decide that we want to be unequal to others. The necessity of equality is born in each of us. It is an irreducible value.

Only within the last few years has it been scientifically proven that two secondary values of *empathy* and *compassion* exist in our DNA. Asking people, “Do you have empathy? Did you decide to have empathy? How about compassion? Have you ever decided to have compassion?” There are no other values behind those values that support a decision to express empathy or compassion. They are irreducible as well.

¹⁸ As we aspire to use more evolved ethical values in our decision-making, we are then able to *become* more evolved as social beings. Life is a process of growing from our current state of being to become something we aspire to.

When we become aware of these six values as having been a part of our everyday decision-making, we are able to come to the conclusion that every person in history, now, and in the future is being urged by the values in their DNA to seek a better *quality of life*.

Non-humans. Consciously or unconsciously deciding NOT to grow, not to express equality with others, and not to express empathy, compassion, and a generalized Love for humanity is a decision to become NON-human. From my experience of working in criminal felony adult corrections, that decision is only rarely a conscious decision.

A Few More Details. The few more details about values will provide a better understanding of the logical nature of the Moral Definitions and Ethics Statements that we will create.

LIFE is the logical prerequisite for the functioning of the other six values. Life is primarily a motivating value to stay alive.

Equality is a motivating value as we compare the quality of our life to the quality of life of others.

Growth is the logical evidence of life. Growth is the evidence of the genetic program expressing the innate potential of the individual and the species. Growth is a motivating value and the prerequisite for the improvement of our quality of life.

Quality of life is a motivating value that takes into account the other six values as they relate to the seven spheres of human experience, (physical, mental, emotional, intellectual, social, cultural, and spiritual).

Empathy, compassion, and “Love.” The presence of these three secondary values in a person’s life is evidence of the degree of that person being human — humane. Without these secondary values, life is a brutish and brutal experience.

From this point we can begin the process of building logic-sequences using the seven values with the confidence that what we are building will stand the test of time for all races, cultures, ethnicities, nationalities, and genders.

A.I. — A Technology in Need of Proactive Morality and Ethics

The moral and ethical predicament of the Artificial Intelligence (AI) ¹⁹ industry extends far beyond AI to include all present and historic presentations of morality and ethics. Morality and ethics have always been taught, discussed, argued, and debated because those efforts have always been ABOUT THE THEORIES of morality and ethics. In comparison, no one really seriously argues ABOUT the metric system of weights and measurements because everyone has accepted the universal standards upon which the metric system is founded. Not so with morality and ethics.

The discussions, classroom instruction materials, dissertations, theses, conferences, workshops, meetings, associations, and journals for example all have one thing in common. They are all ABOUT morality and ethics theories but not theories OF morality and ethics. The reason being that *until now* the universal values that underlie moral and ethical decision-making had not been identified and named. Further, the values that have been used in arguments about morality and ethics do not exist in a context of moral and ethical behavior that can be taught. For over 4,000 years our awareness of morality and ethics has been experienced much like looking at a photographic negative to interpret a picture. Four thousand years of proscriptive statements have not helped anyone reveal a set of values that can initiate proactive moral and ethical decision-making and behavior.

In very humble terms, talking about morality and ethics is much like talking about cake. Talking about cake can reveal many facets of discussion about cake that may include texture, density, flavor, consistency and so on *ad infinitum*, but you will never KNOW cake until you have a recipe and all of the necessary ingredients to make cake, and then verify cake in your life by actually having the EXPERIENCE of making a cake and then eating it. It is the same for morality and ethics.

* Until now there has never existed an identifiable “recipe and ingredients” that support a philosophy of morality and ethics to truly know what is moral and what is ethical, and what is not. This has been

¹⁹ As excised from the author’s paper, *Artificial Intelligence — A Protocol for Setting Moral and Ethical Standards*. Available from the author’s website.

due to the absence of an identifiable, integrated, timeless, and universal set of values.

* The predicament of AI is a predicament for all of humanity — how will it ever be possible to write AI programs that are logical and rational that empower AI to form moral and ethical decisions and recommendations if the AI architects, program developers, and code writers do not know how to use the seven values to discern what is moral and what is ethical, and what is not, and how to discern their own biases.²⁰

CRISIS AND OPPORTUNITY 危机

This early era of AI provides us with a rare opportunity in the history of humanity — we have developed the consciousness of our present global situation to compare it to similar eras of the past. We have the advantage of this vicarious view of those experiences to guide our reasoning and judgment for implementing AI as a helpmate to humanity, rather than a “sword of Damocles” as we have experienced since the invention and uncontrolled proliferation of atomic bombs. Will the AI industry be guided by that history and the experiences that we now suffer under? Or will we build a huge new era of IA technology that will aid and guide human decisions for civilization’s survival and benefit?

—

Isaac Asimov’s “Three Laws of Robotics” that he shared in “I, Robot” in 1950 have a lot to say about AI and AI applications. Consider those three laws.

1. A robot may not injure a human being or, through inaction, allow a human being to come to harm.
2. A robot must obey orders given it by human beings except where such orders would conflict with the First Law.
3. A robot must protect its own existence as long as such protection does not conflict with the First or Second Law.

²⁰ Hempel, Jessi. 2018. “The Human In The Machine.” *WIRED*, “Less Artificial, More Intelligent,” December, 91-95

After having read through the previous pages, these three laws seem to be very simplistic in nature. If we are to grasp the existential angst of Robert Oppenheimer, Father of the Atomic Bomb,²¹ who quoted the Hindu sacred scripture the Bhagavad-Gita, “Now I am become Death, the destroyer of worlds,” then AI architects are walking in the existential shoes of Dr. Oppenheimer, but without his consciousness. What is far different now with AI on civilization’s horizon from Oppenheimer’s situation is past experience. The similarities of the atomic bomb and AI are close with two exceptions.

In the First Exception, we now know what occurred and what developed in the decades following the first use of atomic bombs. Oppenheimer only surmised the vast destructive power of a fission bomb. The development of AI is very similar. We truly do not know what is ahead, but if it is anything like what happened after the atomic bomb was used, then we should use a very cautious approach for AI’s development.

Something more is needed than just those three simple laws that Asimov shared with the world in 1950. Even if Asimov had the working knowledge of the seven innate values of Homo sapiens and also had the morality and ethics that erupt out of those seven values, something more vital is needed.

*** The missing element is the critical distinction between a *personal morality* and a *societal morality*.**

Because AI will become as generic as GPS locators and useful anywhere in the world, its applications and decisions must incorporate the distinction between what will affect groups of individuals, thus all of humanity, and the decisions that affect only individuals. If the creators of AI, and AI, cannot make that distinction, then its application for offensive and defensive military and other applications will leave civilization with threatening consequences. This is an existential distinction that will determine the fate of civilization for good or for its destruction. The illustration below will help us work through this critical distinction.

²¹ <https://www.wired.co.uk/article/manhattan-project-robert-oppenheimer>

The **first priority** of all human and AI decision-making is to preserve the material existence of our species. As this is the premier priority for all humans, corporations, and governments, the morality and ethics that are built into AI programs must be as close to fail-safe as possible.

The second priority must come into play in order to sustain our societal existence. The societal existence of humanity is dependent upon the conscious development of the symbiotic relationship between the individual/family and organizations. That good working relationship is totally dependent upon conscious and intentional decision-making using the three secondary values and the morality and ethics of all seven values. When that is jeopardized, then it becomes eventual that the short and long arc of a society's existence is also jeopardized. In the case of AI, the risk is too great to dismiss the necessity of a proactive and universal societal morality and ethic as the bedrock upon which the foundation of AI programs must be built in order to sustain the societal context of human existence.



Robert Oppenheimer died as a relatively young man at age 62, (April 1904 – February 1967). He lived long enough to see the full development of thermonuclear bombs that have the capability to destroy all living beings on this planet forever. What would he say today about the potential outcomes of the undirected development of AI?

The Second Exception is the difference between atomic bombs and AI is the “I” — intelligence that directs its use. Atomic bombs are dependent upon human intelligence, decisions, and actions to release their destruction. In the case of AI with its own evolving independent intelligence, what critical parameters of decision-making will restrain AI from arranging the decimation of our species? Nothing. Just because AI can be developed to become self-evolving, does not mean that we should allow it without internal restraints (moral conscience) in ourselves and within AI programs.

What is needed is the forethought to embed a proactive morality and ethic into the basic software of all AI applications. It is inevitable that AI software will become self-developing and self-evolutionary. To get a good grip on the potential of what could occur, consider fission and fusion bombs as having AI capability independent of human decision-making. Is that where we want AI to go?

That question requires another question that all institutional AI programs must explicitly answer, “Should AI and lethal military devices be joined in force against humanity?” That question directs the third priority.

The **third priority** of decision-making, whether by humans or an AI program, lies in the distinction between personal morality and societal morality using these seven values. In this priority the foremost concern is the continuing existence (survival) of the social context of human existence because it is only within the social context of human existence that social evolution can take place. Only within the sustaining survival of functional families, communities, and societies can an improving quality of life, growth, and equality evolve for the benefit for all future generations.

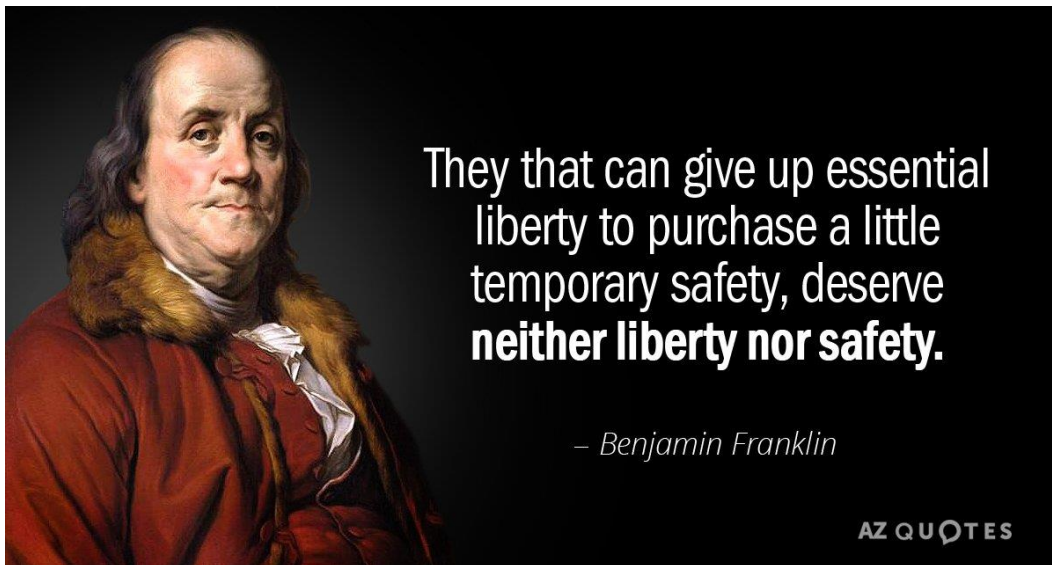
Will AI have the self-awareness to clearly make the distinction between the welfare of the larger society and all future generations, even if that means compromising the lifestyles of some people who are alive at the time? Can it make the decision to compromise its own existence to save the lives of the humans who would otherwise be killed? (This scenario has been played out in more than one Sci-Fi movie.)

✱ In order for the ethical faculties of an AI program to come into existence, it must first be in existence as a desired outcome in the architecture of AI program development. And, prior to that, it must be in the consciousness and belief systems of the program designers and code

writers to fulfill that specification and vision of AI as humanity's perennial helpmate. If the desired end result of AI development is to create incredibly capable artificial intelligence, then it must emulate the highest and ennobling intelligence, wisdom, and decisions of humans.

* AI programming at its best comes down to granular discernment. The best human intelligence is able to *listen* to a rational argument, *discern* the most salient factors, *reflect* on those factors with the foreknowledge of prior experience of self and others, *inquire* with cogent questions, and then is able to succinctly state the *lessons* involved. When there are several related lessons from similar experiences, then we can summarize those lessons into an overarching *wisdom* of them all that can be used successfully with similar situations in the future.

The danger of AI development is that most people have not been taught the basic elements of discernment; and do not have the ability to make competent, let alone cogent distinctions of discernment. It is an elemental process of thinking, i.e., intelligence. Think of discernment as an app of the human intelligence. Proceeding with AI development without this process intact in the mind of program developers and coders, and the existential angst of Robert Oppenheimer to foresee what AI may become, will leave all future generations without representation in those decisions. Let us proceed very cautiously and begin by embedding the best of humane decision-making into the fundamental designs of AI.



5

Working with the Schematic as a Moral Compass

An Experiential Exercise

The Moral Compass of Social Sustainability has three primary functions,

1. Cross-checking the socially sustainable moral validity of those designs and other work that is produced by Social Sustainability Teams;
2. To test the socially sustainable moral validity of existing policies and laws, for example, whether of private organizations, corporations, governmental agencies, or non-profit organizations of any size, for example.
3. To guide the design of new social policies and laws.

NOTE: The following is an adaptation of the same experiential exercise, (44-53), for using the Social Sustainability Design and Validation Schematic. Here it is applied to the Moral Compass of Sustainability. In this case, the purpose of the exercise is to provide a proof that the solutions of the Schematic are morally in agreement with the seven values of social sustainability.

Developing Social Programs to Fulfill the Moral Answer: This exercise will complete the bottom half of the Moral Compass for Social Sustainability by developing programs to “Reduce teen pregnancies / Reduce abortions,” and testing for Moral Validation.

The Top Half of the Moral Compass asks for definitive and descriptive information about the moral question.

1. The Moral Question: “Does the morality of social sustainability support the publication and provision of education and training concerning human procreation to individuals age 20 and below to reduce teen pregnancies, ages 12-19?”

2. AREA OF SUSTAINABILITY: For this exercise, circle **“a. Social”**.

3. State the moral issue being validated for social sustainability. For this exercise, the issue is: **“Free Press, Child Bearing.”** Also, write this as the **“Moral Issue”** in the top line of the Compass. It is duplicated here for future reference as you accumulate pages. Number the pages consecutively.

4. Venue: Circle: **Individual/family level.** For the sake of this example, it is easier to select the “Individual/family” level because an individual or family is the lowest sovereign social level for how it chooses to practice sustainable morality.

5. Statement of intention? This is directly related to “1. Moral Question.” According to our example, we write **“Reduce Teen Pregnancies”**. The moral issue is the publication of relevant material to reduce teen pregnancies, and our *intention* is to reduce pregnancies in this group.

*** At this point the top section of the Compass has been completed.** Because the topic of inquiry has already been examined through the Design Team Process using the ten columns of the Schematic, there is no need to duplicate this process for using the Moral Compass. The moral validation finding of that topic at that point is either “yes” or “no.” What comes next is a discussion of that determination in the Statement of Findings.

Statement of Findings.

The Statement of Findings provides a more detailed, narrative of how the four primary values and the three secondary values were used to validate social and moral issues.

The moral question: “Does the morality of social sustainability support the provision of education and training concerning human procreation to individuals age 20 and below to reduce teen pregnancies, ages 12-19?”

Quality of life: The quality of life is morally assured when informed, conscious, and intentional procreation takes place at the optimum point in the life of the prospective mother, father, and child. **YES.**

Explanation: Premature pregnancies deprive the mother, father, and child of the opportunity of a higher *quality* of life to *grow* into the full

potential of their social, emotional, physical, intellectual, and spiritual maturity equally as others who wait.

Growth: The growth and maturation of the individual, (mother, father, and child), is morally assured when informed, conscious, and intentional procreation takes place at the optimum point in the life of the prospective mother, father, and child. **YES.**

Explanation: Premature pregnancies prevent the optimal course of maturation and growth that support the social sustainability of the mother, father, child, family, community, and society.

Equality: Concerning the potential pregnancy, the value of each person is equal when procreation is preceded by informed, conscious, and intentional decision-making at the optimum point in the life of the prospective mother, father, and child. **YES.**

Explanation: Premature pregnancies deprive the mother, father, and child the opportunities of a more mature life to access the benefits of life equally as others who have waited. Their value to the community and society to aid their own sustainability and that of their own family, community, and society is diminished by the responsibilities of premature parenthood.

Empathy: We have empathy for the child (children) born to a mother and father who themselves did not receive the preparations for their own life to develop their potential. Early pregnancies and subsequent births in most cases deny the mother, father, and child the opportunities of growing up with adequate preparations and opportunities to explore their innate potential compared to those who wait to procreate.

Compassion: In compassion we provide population management education and training, at appropriate times in the child's development, for the child to make conscious decisions about the most advantageous time to procreate their eventual children; or, to decide not to have children.

Love: It is because of our love of all humanity and our concern for the development of socially sustainable societies that we exercise our moral responsibilities to provide population management and

procreation information, education, and training to children and young adults.

Because providing information and training about procreation encompasses the realm of families, the considerations for sharing information and providing training encompasses the earliest eras of the continuum of social sustainability. Providing population management, procreation information, and training does not violate the morality of social sustainability. Oppositely, denying or failing to provide that information and training IS a moral violation of social sustainability.

Necessary questions. Procreation training begins specifically with pre-conception couples who have decided to bring children into the world. What do they need to know to bring a healthy sustainable child into existence? What information does the couple need to know about informing and instructing their child with sustainable procreative information? At what developmental stages does the child need this information? What are the usual developmental stages of sharing specific information in those stages with children who are not capable of reproduction? And so on.

In a socially sustainable society, responsible parenting and child rearing begins by learning about and knowing how to delay procreation until the optimum time in their life to bring children into existence. Second, the process of parenting involves sharing that same information with their child as he or she grows up by providing age-dependent information as the child needs to know. In this way, the moral decisions and family practices of social sustainability become the responsibility of each person. Parents become responsible for enculturating their children in the responsibilities and art of living in a socially sustainable society, and responsible for instructing their children with the knowledge to fulfill those cultural norms in their own lives, and in their own children, including population management and procreation information.

This moral responsibility extends far beyond the individual person to include the three levels of social responsibility,²² and nine moral relationships. In this referenced book in the footnote, 81 combinations of

²² Raphael, Daniel 2016 *Organic Morality — Answering the Most Critical Moral Questions of the 3rd Millennium*.

moral responsibility are described. Here, for the sake of brevity, only nine are described.

Person

A. Person to person: Children are responsible to learn the socially sustainable requirements of procreation, as they age and need to know this information. Parents are morally responsible to inform and teach their children about moral population management and procreation practices.

B. Person to social organization: The individual is morally responsible to delay the procreation of children until they have achieved the optimum point of their own life to have children. Preventing early pregnancies prevents the decrease of the quality of life for the whole community.

C. Person to global organization: The individual is responsible to both maintain the population of the civilization — to produce children, but not more than 1.5 per person, or 3.0 for reproducing couples.

Social Organization

D. Social organization to social organization: Social organizations are responsible to produce internal and external policies, and behavior that supports social sustainability of procreation.

E. Social organization to individual: Social agencies are morally responsible to support and aid individuals to develop the moral foundations of population management and responsibilities of procreation by providing procreation educational materials, training, and assess the individual's progress.

F. Social organization to global organization: Social organizations are responsible to support the moral social sustainability of their nation and the global community of nations concerning procreation and population management.

Global Organization

G. Global organization to global organization: Global organizations are responsible to be in agreement with the principles of socially sustainable procreation and population management practices.

H. Global organization to social organization: Global organizations are responsible to provide social organizations with the support necessary for responsible population management practices by individuals. Global organizations have a necessary moral responsibility to support the efforts of social organizations to provide education and training of individual population management practices.

I. Global organization to individual: This is usually not applicable. See “H” above.

Validating the Moral Sustainability of Legislative Options

For any community or society to become socially sustainable into an indefinite future, all beliefs must succumb to the scrutiny of the Moral Compass to answer the primary question, “Do these beliefs (policies) work? i.e., do these beliefs contribute to the moral sustainability of all families, communities, and societies?” To examine the socially sustainable moral contribution of a law or public policy, we would ask, “Does this statute or public policy *contribute* to or *diminish* the social sustainability of individuals, family, community, society, and civilization?”

Political correctness will surely exist in the future. For citizens who are trained to use the Moral Compass it will be easy to examine any and every statement of political rhetoric for its validity as it contributes to moral, social, and material sustainability.

The Compass would be useful to validate the work of Congress, Parliament, and state legislatures. Every piece of legislation could undergo a four-fold examination, **1)** for how it affects the balance of the budget; **2)** whether an environmental impact statement is needed; **3)** whether it needs a social and/or material sustainability impact statement; and, **4)** whether it passes the “morality-sustainability” test. But don’t expect arguments on congressional or legislative floors to end.

Importantly, the Moral Compass of Sustainability would provide a rational process allowing the actions of any government, social agency, institution, foundation, or think-tank to be validated by anyone using these measurable criteria with the four primary values.



6

The Design Team Process, A Process of Empowerment and Hope

Introduction

Significantly, several highly important interpersonal interactions are in continual operation in the Design Team Process, but only become evident when they are pointed out to team members and observers.

- The seven innate values that are in constant operation in each of the team members also exist in the people who will receive the creative designs of the team's inquiry. Because those values are used as the criteria to validate the Team's design solutions, this symmetry should make those solutions more readily acceptable to the people who will use them.
- Neurologically, using the four primary values and the three secondary values requires both sides of the brain of team members to successfully create design solutions that are well balanced. The left side of the brain is more logical and analytical and works primarily with the four primary values, (life, equality, growth, and quality of life) to create logic-sequences. The right side of the brain is more creative and original in its functioning and works primarily with the three secondary values (empathy, compassion, and Love) to create aesthetic options for developing the Team's results.
- Further, men tend to have a propensity for using the left side of their brain to create logic-sequences for decision-making. Women tend to have a propensity for using the right side of their brain for developing creative designs that are aesthetically pleasing. Some men and women inherently use both sides of their brain to provide well balanced reasoned options. Do not mistake "balanced solutions" as being wishy-washy, centrist, or moderate in nature.

In the team setting, a balanced number of women and men is helpful to develop solutions that will be more readily accepted by those who will use the team's solutions. What the team must seek are solutions that draw upon the best innate emotional, intellectual, social, and cultural mental faculties of team members.

The Team Dividend. Andrew Harvey describes teams as “Networks of Grace,” as quoted by Barbara Doern Drew and Dr. Walter Drew.²³

“Form Networks of Grace.

Harvey acknowledges that in these times of extreme turmoil, death and suffering worldwide, we can feel paralyzed by impotence, helplessness, fear, and despair. In [his book] ‘The Hope,’ he insists that it is essential that sacred activists, while pursuing their individual spiritual paths and specific areas of service, learn to work together and form empowering and encouraging networks of grace.

These he describes as ‘like-minded, like-hearted beings brought together by passion, skill, and serendipity in order to pool their energies, triumphs, grievances, hopes and resources of all kinds.’ He has observed an amazing synergy resulting from such collaborations and says these common [team] efforts can actually take us out of our ‘depleted loneliness’ and start making us ‘a lover and warrior and a midwife for the new.’”

The Design Team Process offers citizens a process of hope to overcome our individual and collective sense of being powerless to affect our social, political, and economic-financial systems. In these times of volatile, uncertain, complex, and ambiguous developments locally, nationally, and internationally, the DTP offers a practical process of empowerment, and hope for citizens to develop sustainable solutions to overcome the problems that confront us.

—

The Design Team Process is the fourth element of the methodology, following the 1) Seven Values, 2) Schematic, and 3) the Team. The Design Team Process involves the interaction of Team members as they work with the Social Sustainability Design and Validation Schematic. Though

²³ Drew, Barbara Doern, Dr. Walter Drew 2019. “A Call for Sacred Activism,” February, 2019 *Guide for Spiritual Living* Vol 92 No. 2, p 122. Quotation from *The Hope: A Guide to Sacred Activism*, by Andrew Harvey.

the Schematic is inert, it provides a familiar procedure for team members allowing the working environment to become highly interactive. A synergism usually develops spontaneously when the Team works through the Schematic and as Team members feel emotionally and socially safe.

The Design Team Process is a highly educational environment where members learn *how* to think, rather than *what* to think. Members who have been trained to work in a Design Team have remarked that their listening skills became more perceptive while their thinking became more keen and discerning. The best result is that team members learn how to ask cogent, even intuitively incisive questions that help lead to clarity in discussions, in or out of the Team.

“Flow” of the Team Process. ²⁴ When the team is in the flow of its work, it is as though time stands still. The flow of the team process takes on a character and “glow” of its own so that the serendipity of insights and participation of the team members occurs when it is needed. There is an underlying awareness among the team members that they “know” the way ahead and their work is on target, useful, and effective.

Using a fillable PDF of the Schematic on a large flat panel or individual laptops will help keep the members at the same level of accomplishment, and help the team anticipate what is needed to add to or amend the Schematic as new input is developed. As comments are added, other members can use them to modify their own thinking as blank areas of the Schematic are filled in. It is also valuable to have additions and modifications visible when other members may be working collaterally with support staff or engaged in online research.

Sources of Knowledge and Wisdom

The sources of knowledge and wisdom used by the Design Team include:

- Using what the members know;
- Investigating historical and contemporary social research;
- Researching archives of wisdom on the Internet and in libraries;

²⁴ Peck, M. Scott, M.D., 1987 *The Different Drum – Community Making and Peace*, Chapter III, “The True Meaning of Community,” p 59-76

- Entering into moments of reflection where each must reach within and find the Source to guide them toward those ingenious, serendipitous insights that did not exist before. ²⁵

The wisdom of sustainability is historic and all around us. From historians millennia ago to contemporary historians they all have much to say about the reasons societies and civilizations fail. The failures are very pragmatic in what they tell us: *Not this way!* It is time that we consciously, intentionally, deliberately, and conscientiously began the process of accumulating wisdom related to social sustainability to turn our national societies into learning organizations. First, we must also create a “Library for Sustaining Human Wisdom,” a repository for that wisdom that can be accessed by anyone, anywhere. Second, local Design Teams are an excellent place to begin because it trains and educates millions of citizens to become contributors to and collaborators of the future they and their children will fulfill with their lives.

No one in the past has engaged this work with the intention of designing socially sustainable societies. We must be the first to avoid adding our own civilization to the list of failed civilizations. Gathering and writing Statements of Validation must not become just another book of platitudes, but pragmatic wisdom that is incorporated into the vision and working policies of sustainable family designs, and organizations; and, that those designs become developed into plans, and action taken to invoke their accomplishment.

Consider the following piece of historic wisdom from Cicero, 55 BCE, that alludes to the sustainability of a national economy.

- The Treasury should be refilled,
- public debt should be reduced,
- the arrogance of officialdom should be tempered and controlled, and
- the assistance to foreign lands should be curtailed lest Rome become bankrupt.
- People must again learn to work, instead of living on public assistance.”

²⁵ Jaworski, Joseph 2011 *Synchronicity, The INNER PATH of LEADERSHIP*

Example. Economies are a product of human social activity. What are the universal, underlying truths, principles, and axioms of sustainable economies? We must discover and apply them to stabilize our communities, nation, and world; and, avoid the obvious causes of economic destruction. Ironically, we are in possession of thousands of years of experience in hundreds if not thousands of cultures, yet we have not compiled that wisdom to answer the question, “What works economically to support social sustainability?”

Once those principles become known and validated, we must create designs that incorporate that wisdom into the training and operation of financial institutions for them to become sustainable and contribute to the economic stability of the global economy. History is fairly explicit in its identification of what financial and economic actions do not work, and must be avoided. What we need to discover is what does work,²⁶ and eliminate what does not work. When we generate designs that work through this process, the economy of our societies will become stable.

It seems an obvious development that a small number of Design Teams with a predisposition for examining historic and contemporary wisdom relating to social sustainability could begin working to discover those universal axioms and principles. Because the three primary values — quality of life, growth and equality — provide the validating “truths” of social sustainability, inquiring teams would soon discover the principles and axioms that are universal to the sustainability of all social structures and processes. I suspect that those inquiring teams will begin to “mine” history books and social research sources to collect the bits of wisdom that hundreds of generations of thoughtful historians, writers, thinkers, philosophers and social researchers have shared.

What is the “Human, Social Continuum”?

As Design Team members consider the parameters for the development of options to social topics of inquiry, those options are affected by where the audience lies in the “Human Social Continuum.” This would be entered

²⁶ Wright, Kurt 1998

into item #4 of the Schematic, page 131. The use of the Continuum helps the Team become more specific in the options they develop.

The human, social continuum (next page) is created by the overlapping of generations from conception, childhood, adulthood, parenthood, and grandparenting by each new generation. This continuum is composed of numerous eras of human development. Because human development is capable at any time during a person's life, and in all seven areas of human development (physical, mental, emotional, intellectual, cultural, social, and spiritual), human existence becomes a rich experience when these seven areas are explored and nurtured. While this may sound like an ideal situation, it is wholly possible to experience when parents understand their role as the most influential to develop the organic potential their child brought with them at birth.

With each passing generation, the older generation (4 grandparents) will come into the play of sharing best practices of parenting and child rearing with the infant/child **and** the new parents. Each generation that has been trained, socialized, and educated in these practices will become a resource for grandchildren of their own older children, thus reinforcing best practices for social existence in these three generations.

A child's innate potential has a far greater possibility of being more fully developed when the "best practices" of parenting and child rearing are used by the parents and grandparents. When we take into account the "layering" effect that grandparents can provide to the application of best practices to their children and grandchildren, each new generation has a far greater possibility of enjoying their potential as adults.

When multiple generations of great grandparents, grandparents, parents, and children are involved in this multi-generational use of best practices, we can anticipate a transgenerational influence that will have a powerful positive effect on society and eventually "bend the culture" toward social-societal stability and peace.

The Human, Social Continuum Illustrated



Described below are my own descriptions of the various eras of human existence from a time before birth to death. Undoubtedly, developmental psychologists and others can provide alternative eras with explanations.

Pre-verbal

- Infants in utero
- Newborns
- Days-old
- Infants
- Pre-toddler children
- Toddlers
- Children who are not yet verbal

Verbal Children

{Here we will need to discover the various major developmental eras of children from verbal to Pre-adolescence.}

- Pre-adolescent
- Adolescent
- Pre-adult
- Young adult
- Adult before leaving home

Pre-couple adults

Couple adults

Pre-conception couples

Pregnancy couples

Parents of:

- Newborns
- Days-old
- Infants
- Pre-toddler children
- Toddlers
- Children who are not yet verbal

Verbal Children

{Here we will need to discover the various major developmental eras of children from verbal to Pre-adolescence.}

- Pre-adolescent
- Adolescent
- Pre-adult
- Young adult
- Adult before leaving home

Summary

The creative and ingenious developments of the Design Team are particularly needed considering the following:

- The problems we now face are global. Yet, our civilization has developed without a plan for sustaining itself.
- Numerous global, civilization-threatening problems have developed that endanger our civilization's continued existence: food and water shortages, decreasing arable land, over-population, natural resource limitations, economic instability, militarism and political instability, and increasingly destructive natural cataclysms, to name only a very few.
- Futurists, scientists, and historians agree that earth's civilization, as it exists and as it grows larger, is unsustainable. The decline in the number of people and the quality of life is inevitable, and, it appears, imminent.
- These problems are so complex, so pervasive, and so huge in scope as to be insolvable by any one government/nation or combination of nations even if those problems were identified and the solutions were obvious. Political position-taking, power-authority-control conflicts, resource acquisition and allocation conflicts between political parties, nations, and large corporations, and public malaise will prevent timely action to alleviate the problems.
- Because no person has ever had the experience of managing and administering a planet, and no one living has the capacity to bring the resources that are obviously available to heal the problems described above, the only resource that has the talent, breadth of service and sheer numbers needed to begin healing the unstable and unsustainable nature of our global culture are the people who have the most to lose and the most to gain — millions of citizens in thousands of local communities.

Without innovative solutions from the bottom-up at every local level to move our societies toward social sustainability, our civilization is likely to go the way of many dozens of civilizations that have risen, peaked, declined, and disappeared, (Diamond, Jared). Implementing design solutions for social sustainability must emanate from the people who will enjoy the benefits of their preparedness, or suffer from their lack.



Part 2

Getting Started Globally

Values underlie all decisions — always.

Progressive social evolution will not be possible
Until leaders and the people realize that
The hope of a better nation – and a better world –
Is bound up in
The progress and enlightenment of the individual.

7

Conscious Social Evolution and a Call for Action

Of all the concepts and ideas that have developed in writing this book, none seems to make a heart connection with me quite the way that “conscious social evolution” does. I first heard about “conscious evolution” as being somewhat of a popular idea 10-20 years ago when a friend sent me a link to Barbara Marx Hubbard’s website (Foundation for Conscious Evolution ²⁷). I realized immediately that it fit with the concepts of social transcendence and a sustainable democracy that I had been working on for over 30 years.

It is fortunate for all of us that Barbara Marx Hubbard, Ervin Laszlo, Andrew Cohen, the Dali Llama, Wayne Dyer, and Deepak Chopra among others have tilled the soil of consciousness to prepare adherents of conscious evolution for what must occur; for participating in the developments that require the principles of conscious social evolution to become a pragmatic part of our social, political and economic realities. For conscious social evolution to become an ongoing process of constructive social change, it must be guided by the best efforts of our society’s cultural leaders.

What is needed are the steady hands of patient social activists to guide that social evolution consciously, deliberately, and with forethought of intention and design. Social sustainability provides sound forethought and intention that will require the very best efforts of the very best people in our communities and societies to bring peaceful, thoughtful conscious social evolution into being. “Social” sustainability focuses its attention on “conscious *social* evolution,” and provides a process for intentionally and consciously creating solutions to social issues and problems rather than “fixing” them. The illustration on page 85, *Priorities of Decision-Making in a Socially Sustainable Society*, uses the seven values that have sustained our species’ survival to create socially sustainable solutions that support the creation of social sustainable organizations.

²⁷ <http://barbaramarxhubbard.com/conscious-evolution/>

Hope. Now that I look back at those moments when I had developed a deep appreciation for “conscious evolution,” I realize that what I felt was a bit of authentic joy to roll those words around in my mouth and hear them come back into my ear for further thought. I realize now that joy was and still is deeply connected to the *hope* that the words “conscious social evolution” evokes in me and in others. It is as though those two words develop some kind of heart centered resonance where the first word that comes to mind is *hope* !

But, hope for what? That question required a bit more reflection in contemplation mode. I began to realize that conscious social evolution gave me hope, as I have confirmed with others, that we, individually and collectively, could become involved in, participate in and become co-responsible for forming the future that would unfold for our children and great-great-grandchildren. Conscious social evolution has never been attempted before with a means to accomplish it! Yet, as I searched for the means and methodologies that might be connected to that evolution, I found none, other than to “Share your vision to fulfill your dream of making the world a better place through the power of your voice” as suggested by Barbara’s site.

The hope of the future lies in local Design Teams initiating the conscious evolution of our social, political, and economic institutions. Because the Schematic uses the seven values of our species, the findings of a team become complementary to those of other teams. Self-initiating local leaders who organize local Design Teams can begin developing sustainable models for social, political and economic policies, processes, organizations and institutions, and the options for the inevitable decisions that will have to be made in this century.

Many decisions will have to be made considering that over 7 billion people live on a very crowded planet that was designed to sustain 1.5-3 billion. For anyone who appreciates historic and global perspectives, you already know that world population is far beyond the limits of material sustainability for this planet.²⁸ While most social scientists know this and the fact that the planet will experience a severe population collapse before

²⁸ *Sustainable Population Levels Using Footprint Data* Dell Ericson© 2000.
http://www.mnforsustain.org/erickson_d_determining_sustainable_population_levels.htm

2050, ²⁹ most people are completely ignorant of the peril they live in. Most people who are now age 60 and below will experience that collapse, either as observers or participants. The population collapse is inevitable and unavoidable, but how we prepare will give hope to those people and communities who remain to rebuild communities and societies to become socially sustainable.

Time to Reflect. In the slower pace of history, before telegraph and smart phones, people had time to reflect and contemplate about their experiences — time to examine any lessons that may have been inherent in them, and to gather the wisdom from those lessons. People are now on information-overload from many sources. Who wants to take time to think about the trends of a culture or society? Almost no one. Scale that up to a national level and you will quickly see that no one is gathering the wisdom needed to lead us out of the thickets of public issues that will soon erupt.

Accessing Our Collective Wisdom. In times of rapid social change and our imminent awareness of greater difficulties coming to individuals from forces we have no control over, accessing the collective intelligence and wisdom of our citizens is vital to our mutual survival. It is vital that organizations are desired so that support learning from the lessons of our individual and collective experiences. If people do not have time to reflect on the experiences of their life, then our organizations must.

Historians have chronicled thousands of years of social change in hundreds of cultures in earth's history, yet there are no reports that those societies perceived the developmental stages that led to their demise. And none speculated about a sustainable society, let alone thought of conscious developmental social evolution that would lead to social stability. Most gave only limited attention to material sustainability; almost all assumed that social stability was an outcome of material provisions; and no thought was given to proactive social sustainability and a supporting morality that aids in that process. That pretty well describes the state our own societies, today!

The conscious social evolution of a society begins when organizations are designed to become self-aware, much like a self-observing person. (See

²⁹ Meadows, Donella, Jørgen Randers, [Dennis Meadows](#) 2004. *Limits to Growth: The 30-Year Update.*, Chelsea Green Publishing Company and [Earthscan](#).

page 23 for the “Observing Self,” and page 34 for being “proprioceptive.”) Only a self-aware person is capable of engaging activities that allow him or her to consciously transcend their own beginnings — to learn from their experiences.

The inception of the conscious social evolution of our societies begins when numerous Cultural Creatives³⁰ take it upon themselves to promote social consciousness, and then organize others to broaden and deepen their intentional experience of projecting their consciousness of oneness onto the world. This work provides a fertile and receptive seedbed for subsequent pragmatic actions that help social organizations evolve through developmental stages.

Some readers may disparage such work as being idealistically impractical, which to them may seem like so much New Age, woo-woo, mumbo-jumbo. Yet, some of the most highly paid motivational speakers in the world use this approach for themselves and recommend to their students that they “project themselves into the situation” where they are going to make their presentation. It is the process of visualization that “puts you there, actually present in that situation.” Only in the projection can you feel and experience the anguish or triumph of the moment. By its very nature the conscious social evolution of our societies must become an intentional process of positive, constructive thinking, and using a reliable methodology to project that onto the world.

When individuals make a decision to take action to create sustainable communities, they have begun the conscious social evolution of their societies and cultures. Who will lead local citizens to do so? Every community has that unique 1% who are natural born leaders who see that something needs to be done and motivate their neighbors to get involved. These are the unrecognized Cultural Creatives who exist in every community. It has always been local citizens in local design teams who have and will continue to determine the course of their communities and societies.

If citizens leave the development of social sustainability and the social evolution of their communities in the hands of politicians, nothing will get done. What is the alternative? It is to consciously bring about the conscious

³⁰ Ray, Paul H. Ph.D., *The Cultural Creatives: How 50 Million People Are Changing the World*. (2000), ISBN: 0-609-80845-1

social evolution of societies beginning in local communities, based on the seven values that have been proven successful to sustain our species. This has not been tried before! What is required is a willingness to accept responsibility for the fate of future generations without the possibility of ever seeing that accomplishment. This is no different from the expectations of the architects who designed and began building gothic cathedrals, some of which took centuries to complete.

A Call to Action

What will motivate local citizens to take action will be the continued and obvious failure of legislatures and Congress to take any effective action in a timely way. We can expect no guidance from state and national leaders during the coming era of epidemic social upheavals as they scramble and mumble through while striving to look impressive and successful. What we can hope for is an eruption of thousands of self-initiating local leaders to come forward to use the tools provided here to begin creating new intentions and designs for social processes, organizations, and agencies even as the larger society around them is collapsing.

Existential Crisis

+ Conscious Decision

= Conscious Social Evolution

→ *Culture Change!*

Billions of people are completely unaware of the precarious house of cards that international finance and economies are built upon. This is particularly the case when it concerns the fragile political situation of the Middle East from which a major portion of global petrochemical industries and national economies are dependent. This is also the case as it concerns the immense indebtedness of most developed nations. There is the appearance of these being stable and permanent. But that is only an appearance.

When billions of people are unaware of the fragile nature of their social, political, and economic situation they have a mistaken sense of calm,

order, and confidence that “everything is fine.” How could so many people be wrong in what they believe? They are wrong because they all subscribe to the same base of *underlying, unexamined assumptions* that provide them with a false sense of security and confidence. Few people see the contemporary situation in the world as seriously problematic. The irony of this global situation is lethal: Conscious choice of the options and taking action is only available with awareness of an impending situation. Being unaware, no decisions seem necessary. Being unaware and all in agreement, no one has the awareness that they need a methodology that examines their underlying, hidden assumptions and to design socially sustainable social processes, organizations, and institutions.

*** *Existential Crisis.*** Lack of awareness usually is the leading cause of an existential crisis. An existential crisis is a dawning awareness that solutions are too late, with a simultaneous awareness of regret for not being more diligent to observe what now appears to be so obvious! Grievously, it will be just as obvious that it is far too late to make preparations for the reconstruction of those societies.

What will bring that existential crisis into view is a widening observation by a few thousand people who see as if in slow motion the developments of societies on a course of crises-in-evolution. Some already see not just one but the beginning of a cascade of crises that will destabilize global economies and eventually develop into full blown cataclysms that will overtake the resources of even the most prosperous and powerful nations. For some, the decline and collapse of contemporary civilization is not only possible, but probable, and perhaps imminent.

Long before this occurs, the awareness of those proximate crises will be in the minds of those who have an acumen for making predictions whether economic, financial and market analysts, military forecasters, insurance actuaries, governmental budget analysts, or ordinary citizens who are observant of the longitudinal developments that support societies or cause them to crash.

That situation will be much like a motorist who has stalled his car on a railroad crossing with cars stopped ahead of him and behind him, with a fast-moving freight train approaching. The only reasonable alternative is to get out of the car and watch as the train smashes it to smithereens. In the case of the approaching global existential crisis, hopefully some will come

forward to point out the obvious, and call for solutions to reconstruct broken societies and nations afterwards. What is obvious to me is that all of history and our current reality have not prepared us for what is about to happen to billions of people in myriad ways.

+ *Conscious Decision.* The earlier that nations become aware of this existential crisis, the sooner they can prepare to reconstruct their communities, societies, and nations to become socially sustainable. What is most troubling about this situation is that most national leaders in developed democracies already know of the crises ahead, though few of them are fully aware of the magnitude of what is to develop. Again, it falls upon self-initiating local community leaders to acknowledge what is developing and to make the public aware of these developments. Yes, many will panic as these crises become well known, publicized and dramatized by media.

If you look at this situation as a global civilization in great despair without any workable solutions being provided by national and international leaders, then it comes down to the initiative of self-motivated, self-appointed individuals who see a problem and have the chutzpah to step forward into leadership. Perhaps they have read of some ideas that form the basis for plans to reconstruct their community.

The decision to begin designing the reconstruction of communities and societies may seem too surreal to engage now in pragmatic terms. But old timers who went through the Great Depression or who reported on it would agree that preparation for what is to come is paramount to rapid recovery.

= *Conscious social evolution → CULTURE CHANGE!* What will occur eventually is the outforming of a pragmatic idealism — those pragmatic designs that bring all of these influences of social sustainability together into integrated systems of social and cultural development that have purpose, intention, and a vision of what is to become. Being self-aware, decisions are made in a continual manner so that adjustments are continual by a conscious and ongoing process of feedback decision-making, as in a learning organization. That feedback mechanism is provided by the Social Sustainability Design and Validation Schematic and the Moral Compass act as aids to validate the choices for action that lead to social sustainability.

When this comes into place even in a small way our culture will have begun its course toward a sustainable future. Sustainable culture change develops as one success leads to another, where integration dominates over decisions and actions that cause separation.

This culture change involves a conscious awareness of the holism of social systems. When awareness occurs, then the culture is ready to change its strategy from “fix the old paradigm” to “let’s create the future.” In pragmatic terms, this involves social planners having personal, social and world views that envision all social systems as being sustainably linked as an integrated social system. This will not be a rational system until a socially sustainable morality is applied to the three primary pillars that support a functional society, (social-societal, political-governmental, financial-economic) of that social holism. Whether that involves health care systems, fiscal, economic, and financial systems, jurisprudence, education, and spiritual systems, for example, all are seen as interlinked systems.

Contemporarily, organizations exist unto themselves without a common intention to make contributions to the individual/family. What we see in the aggregate of social institutions, social systems, and organizations is the potential of an integrated intention for all social institutions. What keeps that aggregation from becoming an integral system is the absence of universal values. (See illustration, page 63.) Because values always underlie all decision-making, when there are no universal values there is no proactive decision-making that contributes to their mutual survival. And because of that, and intentional and conscious social evolution in any society, whether democratic or autocratic will not be able to become more than just an intention.

A Different World View

Achieving social sustainability requires a much different world view than most people have been given. First, people now seem to be most concerned about the economy and financial matters that affect them personally. While those matters will never disappear from our conversations, they will eventually be seen and valued as the decision-making processes of organizations that support the continuity and sustainability of our families, communities and societies.

Second, achieving social sustainability is a very long term project. Many people use the US Space Program initiated by John F. Kennedy as a standard by which they measure national programs – something achievable in less than twenty years, and preferably within two presidential administrations. Yet, such a measure pales in comparison to a program that would lead a nation into a very long term era of social, political and economic stability, i.e., social sustainability. Such a program would require rewriting social policies and decision-making processes from monetary, quantitative measurements to measures that assign qualitative valuation to social programs that aid the advancement of social evolution and social sustainability. What once was measurable in terms of quantities of money then becomes measurable in terms of improving the quality of life of individuals, families, communities and societies.

Such a long term project would bring about a fundamental culture change where individuals see their decisions, actions, lifestyles, and standards of living as contributing to the sustainability of other individuals, families, and communities. Such a world view and culture change can only be accomplished when organizations are also designed to become socially sustainable; and, make decisions that contribute to the stability and eventual social sustainability of families, communities, and society. Such a vision must have the clarity of sight that requires social proposals to contribute incrementally to the quality of life, growth, the equality of citizens, and to their own organization's social sustainability, i.e., social evolution.

Awareness

Is social sustainability a desirable goal? Is it even reasonable for a society to consider such a goal when the vagaries of the human character are so unstable as to make any attempt fruitless? Is there any apparent need to even consider such a monumental task as this? Answers to these questions will not become apparent until the missing puzzle piece appears: Imminent necessity! As of today, there appears to be no apparent necessity for even discussing social sustainability let alone thinking of the option to consider it as a local or national project.

Because most people lack the awkward gift of prescience, the need for developing social programs that support social sustainability must wait

for more global crises to remove their cavalier “business as usual” confidence. Until then, making a decision about social sustainability will make no sense, as most decision-makers are not even aware of social sustainability as an option.

Some however do believe that this planet’s civilization — your community and your way of life — is under threat of social, political and economic upheaval and eventual disintegration. If this is apparent to you, then it is also necessary that you believe that you can do something to counteract this threat — something that will aid your community, family, children and grandchildren to move toward the stable social state of social sustainability.

Resources

Educational institutions, particularly colleges and universities, already have the resources to begin. What most educational institutions are missing is the awareness that the preliminary work has already been completed. There exist vast libraries of social research that can be mined for the wisdom of social sustainability — what works in the long term. Knowing what does not contribute to the healthy longevity of a society is vital as well.

The missing elements for guiding research into those libraries are now available: The combination of the seven values of social sustainability, the Social Sustainability Design and Validation Schematic, and the Moral Compass of Social Sustainability. Perhaps an algorithm could be devised to scour historic and contemporary social research for evidence and wisdom, that contribute to social, democratic and economic sustainability, or not. These must be collected and collated before efforts are made to begin *designing* socially sustainable models from validated research findings. Their effectiveness will be greatly enhanced when they are then validated in a “Design Team” environment.

For educational settings to move ahead to include social sustainability as a curriculum, I believe that almost all of the necessary resources already exist but need to be redirected and applied to this area of study and research. The timing is significant to begin developing leadership in this area as the social stability of our societies becomes questionable. Much

work is needed to teach and train future leaders and constituents how to prepare their organizations and memberships to apply social sustainability practices.

Training. If hundreds or perhaps thousands of local Design Teams are to come into existence, how will they be trained, and by whom? The methods for training and preparing hundreds of millions of citizens in a relatively short period of time to participate in thousands of local social sustainability teams will require Internet technologies, software applications, and training simulations on personal computers and smart phones. These technologies will provide the capability to inform, train and educate millions of citizens in weeks rather than years to participate effectively in developing social sustainability in their lives, family, and community. This technological capability is already existent. Only the training materials and models need to be developed.



“Is democracy as we know it the
last improvement possible in government?
Is it not possible to take a step further towards the rights of
man?

There will never be a free and enlightened State
until the State comes to recognize the individual as a
higher and independent power,
from which all its own power and authority is derived
and treats him accordingly.”

Henry David Thoreau, "Essay On Civil Disobedience," 1846

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Training Billions

Introduction

How would you train billions of people in all democratic nations to design and apply socially sustainable practices for their nations and cultures? In view of the immense social changes ahead, the best way would be to do it is quickly! That training would include the dominant languages of those cultures, using instructions that produce uniform outcomes, over the Internet with simulations and experiential exercises. Training would be needed in every community to give citizens an appreciation and understanding of the significance of sustainability from local-to-global levels. Further, the training must help citizens participate to make more conscientious choices, as they will be the ones who will live by those choices.

Today, with the incredible capacity of telecommunications, there really is no rational reason not to train the public to move into the future in step with the responsibilities of informed citizens to make decisions at the local and societal levels. Most philosophers have always known that the all affects each, and each affects the all. We are not apart from that responsibility any longer, particularly as our world becomes less and less sustainable

Smart Enough? The biggest assumption of introducing Design Teams and validating moral sustainability is that citizens of democratic nations are concerned enough and smart enough to fulfill the goal they set for themselves to initiate socially sustainable solutions for their communities and nation. “[In a company] ...the best way to value people is to create an environment in which smart people are treated as if they are smart. Employees are told what the goals are; they are not told how to achieve them.”³¹ (p.11, Annunzio)

The way into the future is through trust in the capability of our citizens to “find their way” ahead like sustainability Taoists, and as Annunzio

³¹ Annunzio, Annunzio, Susan Lucia 2004 *Contagious Success*
Penguin Group, New York p 11 ISBN: 1-59184-060-0.

suggests. Only by designing, testing, doing, revising, testing, doing, and revising again and again will we achieve that goal. Mistakes are a natural part of the process of creating successes. Because no one knows the way into the future, we must use our collective intelligence in local community training workgroups and those via the Internet to train people to initiate and function in local Sustainability Design Teams. We know the goal — create stable societies and social processes, organizations, social institutions and social policies. I believe people of developed democracies are fully capable of finding their way forward toward that goal in hundreds of community Design Teams, and collate their findings into sustainable social principles for the decades and centuries ahead.

Inner Resources. Citizens of democracies are both a resource and a solution-creating source to move their societies into sustainability. As an internal “knowledge community,” technologically developed democracies have a huge untapped creative resource of intelligence and knowledge in its citizens that can be brought to focus on any matter of survival, existence, and social and political stability — the long-term goal of social sustainability. *One ingredient is needed — training and encouragement for all communities of every democratic society to become solutions-capable.*

Social media and Internet technologies. Electronic telecommunication technologies, the Internet, and social media have made it *impossible* for millions of people to remain aloof and anonymous as they once were in “the silent masses.” Those technologies are being used as a convenient *tool* for self-organizing networking for protests, revolts and riots ³² and can be used as effectively for citizen participation within the local communities, political jurisdictions, and larger jurisdictions.

These technologies have become so pervasive and effective that it is predictable that millions of “Social Cyborgs” will bring about the peaceful networking of like-thinking social-political groups. ³³ The vast majority of X, Y, and Millennium Generation citizens already know that the traditional, staid representative democratic processes of 2nd Stage Democracies ³⁴ will never be able to address or resolve the social problems that are rapidly arising in evolving societies. Social networking mentioned in “#Riot” creates

³² Bill Wasik, “#RIOT, **WIRED**, 20.01, (2012):76-83, 112-115.

³³ Joe Campbell and William Finegan, “Dawn of the Social Cyborg,” **TRAINING**, 48.05, (2011):20-27.

³⁴ Raphael, Daniel 2017. *The Progressive’s Handbook for Reframing Democratic Values* p 109.

social and political pressure to opt for an effective means of resolving rising anti-establishment sentiments.

Fortunately, the same tools used in networked protests can be far more effectively used in combination to create an ongoing *process* that supports the peaceful empowerment of far larger masses of thoughtful and peaceful citizens. The “silent majority” need not stand by silently any longer, but can be actively and powerfully involved in the social and political developments from wherever they are connected to the Internet. The rational option becomes obvious: proactive invitation to the public to participate more effectively and peacefully in their representation, enabled by the *proactive rapid training of those millions using those same technologies*.

Training and education have taken to the Internet. Stanford University and MIT among others have begun to teach tens of thousands of students around the world.³⁵ Stanford professors Sebastian Thrun and Peter Norvig, at Stanford University, in the fall of 2011 opened an online class, “CS221: Introduction to Artificial Intelligence,” to anyone who had an Internet connection. They expected at most 2,000 students, but within weeks they had enrolled 160,000 worldwide with over two-thirds living outside of the United States.

There is reason to believe that this global educational technique could be as easily and as quickly applied to an educational program for *Designing Sustainable Societies and Democracies* in every democracy in the world in their national language. The effect would be a positive and constructive cultural shift as each democratic society began its journey to develop sustainable social processes, organizations, institutions, policies and laws. The learning experience of one democracy would become echoed in other democracies, with each sharing their experiences, knowledge, and wisdom so that all democratic societies could be “on the same page” and “come up to speed” together. And for those societies that were not ready, the wisdom gathered would be available online for them when they were. Further, developing democracies could shave decades from their growth curve to become effective democracies far earlier than has historically been the example.

If we saw our democratic nations as learning environments, public media and Internet technologies could be used to deliver training

³⁵ Steven Leckart, “The Stanford Education Experiment,” **Wired** 20.04 (2012): 068-077.

resources to wherever citizens are connected to the Internet, whether by smart phone, hand held device, laptops, desktops, or the local library PC. Importantly, it would initiate a national strategic planning process that is ongoing, continual, and able to learn from its successes and failures. Strategically, it would provide a hands-on, ongoing method for training next generation, strategic thinkers and planners with improving accuracy as sustainability principles become known.

Fortunately, uses of smart phones, laptop, and home and office computers could be applied quickly to provide training. These would offer the “students” the opportunity to make mistakes as a means of learning how to discover and create socially sustainable answers to pragmatic moral and social problems and situations they will or have already encountered in their community. Training can proceed quickly across several national populations providing they have a similar language.

Training could occur in a short period of time with these same technologies using experiential training simulation software in the form of smart phone apps. The rapid acceptance of computer and Internet technologies are examples of how quickly our culture can assimilate and use those technologies effectively. With the goal of becoming socially sustainable, *social change will have direction and purpose* to the benefit of all social institutions in all democracies and the lives of billions of individuals.

The same dynamic changes that have occurred in corporate learning environments in the last twenty years involving the phenomenal application of communication technologies, particularly smart phones, are now broadly taking place in all technologically developed societies. These are intrinsic within the X, Y and Millennium generations. These young minds have become “Social Cyborgs.” “It’s naïve to assume that people who have grown up using these technologies have not adapted new ways of learning, thinking, and problem solving. ... Social Cyborgs have adapted their learning to take advantage of this rich environment. They research problems by leveraging the social networks and information resources available to them in the network. They review and filter information through open knowledge systems such as Wikipedia. They rely on their social networks to determine the value of information. They solve problems by seeking out help from their social contacts. This is distributed learning

that leverages technology and people.”³⁶ We can anticipate that they will become the innovative social and political leaders of Stage 3 Democracies.

Tough decisions. Training Internet-connected citizens to participate more directly and effectively in their representation in every democratic nation will broaden the base of acceptance for the tough decisions ahead. To move democratic nations and the democratic global culture into 3rd Stage Democracies,³⁷ public executives must also be taught and trained how to reframe their thinking from political processes that support democracy to social processes that support sustainable democracies.

Political leaders and the public must grasp the reality of examining choices and making those tough decisions that move this nation into a socially stable future. Is this too far advanced, too far ahead of the leading edge of social development for young leaders in every venue of business, government, and social organizations to come forward to engage this exciting new social-political agenda? I don’t think so!

A connected system of Teams will also require training to integrate their findings. What use are these systems if they do not lead to *the retention of wisdom* from decision-making to guide future decision-making? None. To ensure the efforts of hundreds of teams are productive and effective begs for the establishment, organization, and development of an “Institute for Human Sustainability” in order to provide uniform training to teams to develop uniform standards for their findings. This would allow those results to be accessed by other teams anywhere in the world.

Corporate Leadership and Sustainability. Corporations now have the opportunity to become the cultural leaders of this new era of sustainability, if they choose and take action in that direction. Their most valuable asset is being multi-national and non-sovereign, which allows them to be far more nimble and adaptive to attain and implement sustainable answers than the governments of sovereign nations.

The development and implementation of policies that support social sustainability by any large organization, whether corporate or governmental, will occur because to do otherwise is too ominous. Becoming aware of the choice to adopt or not to adopt policies that support social

³⁶ Ibid, **TRAINING**, “Social Cyborgs.”

³⁷ Raphael, Daniel 2016 *The Progressives Handbook for Reframing Democratic Values*, p 99-101, 109.

sustainability is not far away. In that awareness of choices, corporate boards won't need to be historians or futurists to realize that by looking back at the ripe and prosperous years of the past, they will come to realize that the world is plunging rapidly headlong into un-sustainability. The real questions corporations must answer is this, "How do we remain sustainable (make a profit and stay in business) in a world with declining populations, declining income per capital globally, and with a decreasing middle class?" The centuries old assumption of continuing population growth with a prospering middle class to fuel corporate growth, profits, and dividends will be proven in error in the next decade or two. Large organizations must devise new global strategies to survive.

The slow, invisible creep of history eventually comes to a point in time when only great leadership seems to have the capacity to see, almost with prescience, the "right" decision must be made, and action invoked, (Jaworski, Joseph, *Serendipity, The Inner Path of Leadership*). We have come through a tremendous profit-making era, followed by the global financial bust that began in 2008, and now we are in the airy drafts of an unstable global economy waiting for the next era to become identified. Prescient leadership is needed now to ensure there is a bottom line.

Every corporation that aspires to build a lasting commercial presence can begin the process by validating the sustainability of their corporate policies. Profit or loss, return on investment, and percentage of profit and other short term measurements are not sufficient for any corporation to make a conscious choice to engage societies that are not moving toward social stability and social sustainability. Corporations now must look to the subtle tides of social change that are washing the shores of every facet or democratic societies, and prepare for that odd rogue wave that could wash them away.

No government or corporation is above validating its policies in light of social sustainability, considering what is coming in this decade and the next. Governments and corporations will come to see their functions *within* the context of social sustainability. In the term of decades and centuries, a nominal lifetime for a global corporation or government, choosing to function outside of the irreducible parameters of social sustainability is very risky. The social evolution of our global society has developed to where reckless commercial and environmental adventurism that violates these values will yield severe economic penalties.

When corporate or governmental goals are discussed, we must ask, “Goals for whom? Do those goals meet the standards of social sustainability?” The goals can be that of a community, city, county, state, region, and the national and international community of nations; and, sole proprietorships, companies, national corporations, and global corporations. The question is as valid if asked by only one citizen or board member, or hundreds of thousands. If an international corporation has in its goals to be in existence 50-250 years from now, then it must begin now to anticipate a sustainable future.

Assumptions: A Social Sustainability Team System

- People are willing to work on a project in which they see gradual results for their volunteering in a Design Team.
- People will be motivated to develop social sustainability designs for their communities, states, nation, and the community of nations progress toward stability, good relationships, and peace.
- People are willing to take personal responsibility to contribute what they can toward improving their community by volunteering in a local Design Team.
- People will be patient as this imperfect process gets underway.
- People will overcome their pessimism that individuals can make a difference in their world; that they can literally create the future they desire for their children and grandchildren.
- Teams around the nation will produce and submit designs for social processes, organizations and institutions; teams will also submit to examination and test for validation of public policies in areas of their choice.
- That citizens do not feel secure to invest their future solely in the hands of politicians, but need to originate the designs for stable, secure and sustainable communities and societies.

Assumptions: An Independent Institute

- That the summaries published by the Independent Institution will be examined for implementation by local social organizations, institutions, agencies, and, governmental agencies; and considered for adoption and implementation.
- That individuals and whole communities will be willing to examine their “sacred cows” of belief and unexamined assumptions in light of sustainable social policies.
- That local governmental agencies, states and the nation will be willing to examine and validate existing social policies.

Some assumptions of citizens work against their personal and social agendas. The following are not necessarily unique to Americans.

- “We can do it ourselves better than anyone else.”
- “What was good enough for my father and grandfather is good enough for me.”
- “What decline in our civilization?”
- “We’re not worried, we’ll just keep doing what we’ve always done.”
- “Why bother our public executives? They know what they are doing.”

Future World View

How do we see ourselves in relationship to “out there”? We see ourselves in a global community of socially sustainable democratic nations, and nations developing toward social, political, and economics stability. Stable international relationships and peace are essential to this development. As our communities and nation become more and more socially sustainable, we aid our neighboring communities and nations to do the same. Until all nations consciously and intentionally work toward social sustainability, global peace will always be in jeopardy.

Our Work

To design and build a system of local learning organizations (Design Teams) within democratic systems that generate learning outcomes for communities, organizations, and for individuals.

Summary / Conclusion

When we consider the three pillars of functional societies (social-societal, political-governmental, and financial-economic) in terms of social sustainability, we must consider two positions. The first is that the development of these pillars of society to take on the values of social sustainability in their decision-making will contribute to the very long term stable continuity of societies, and our global civilization. The second is that the development of these pillars will contribute to the very long term, stable continuity and social sustainability of individuals, families and communities, locally and nationally.



“The best way to predict the future is to create it.”

Alan Curtis Kay, 1971, at an early Palo Alto Research Center meeting.
(Also attributed to Peter Drucker and Dandridge M. Cole.)

**“Strategic planning is worthless —
unless there is a strategic vision.**

**A strategic vision is a clear image of what you want to
achieve,
which then organizes and instructs every step toward that
goal.”**

John Naisbitt, *MEGATRENDS*

9

Addenda

COMPLETED EXAMPLE: Social Sustainability Schematic	123
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SOCIAL SUSTAINABILITY DESIGN AND VALIDATION SCHEMATIC ~ Project: Child Bearing

p. 1

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1. **GLOBAL STATEMENT OF PROJECT:** Reduce Teen Pregnancies, ages 12-19
2. **STATEMENT OF INTENTION (briefly):** Decrease abortions
3. **AREA OF SUSTAINABILITY:** ☒ a. Social or ☐ b. Material ?
4. **State the area of examination for social sustainability (e.g., family, childrearing, community, education, health care, economy, commerce and trade, governance, or other) :** Child Bearing
- OR
- State the question relating to material sustainability:** N/A

5. **VENUE:** ☒ → Individual/Family ☐ → Community ☐ → State/Region ☐ → National ☐ → Global Region ☐ → Global

6. CRITERIA FOR FULFILLMENT (This should be measurable) [We observe]	7. EXPECTATIONS (This involves planning) [We expect]	8. BELIEFS (And assumptions) [We believe]	9. INTERPRETED VALUES [We value]	10. INNATE VALUES
a. Fewer incidents of pregnancies for girls 12-19; b. Lower school dropout rates, more graduations; c. Fewer abortions (reported/projected); d. Fewer welfare and WIC enrollments e. Fewer reported abandoned infants; f. Fewer infants put up for adoption g-z. Other criterion as necessary to measure this project.	* Diagnostic, self-administered evaluatory tests are provided to determine what clients know and do not know regarding human procreation; Test results are tied linked to self-teaching guides. a-f. Educational, instructional, and self-administered materials (reading, video, smart phone apps, and other materials) are developed for age-related and developmentally related individuals. * Self-administered retesting is provided to guide the client to knowledge areas that show low comprehension.	a-f. Individuals of any age cannot make moral decisions without knowing the repercussions from their decisions. * All individuals who are capable of reproduction morally should know how to prevent pregnancy, and the most beneficial time to reproduce. Pregnancies and subsequent births between the ages of 12-19 are life-changing events for all concerned: parents of the girl and boy, the child that will be born, and the burden upon social agencies, and taxpayers for example. * (Continued)	Preserving life is the #1 value for all people. Opportunity to grow into one's potential becomes a real capability when procreation is delayed, giving the young adult a more equal possibility of improving their quality of life. This capability is enhanced when pre-pregnancy individuals have their empathy and compassion awakened by personally experiencing the problems of pregnancy, birthing, and parenting by those who did not wait.	LIFE Equality Growth Quality of life Empathy Compassion Love of Humanity

CRITERIA FOR FULFILLMENT (This should be measurable) [We observe]	EXPECTATIONS (This involves planning) [We expect]	BELIEFS (And assumptions) [We believe]	INTERPRETED VALUES [We value]	INNATE VALUES
		<p>* Abortion is an immoral act; the consequence of negligence, and lack of knowledge of consequent repercussions, for example.</p>		<p>LIFE</p> <p>Equality</p> <p>Growth</p> <p>Quality of life</p> <p>Empathy</p> <p>Compassion</p> <p>Love of Humanity</p>

SOCIAL SUSTAINABILITY DESIGN AND VALIDATION SCHEMATIC ~ Project: _____ p. _____
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1. GLOBAL STATEMENT OF PROJECT: _____
2. STATEMENT OF INTENTION (briefly): _____
3. AREA OF SUSTAINABILITY: ☐ a. Social or ☐ b. Material ?
4. State the area of examination for social sustainability (e.g., family, childrearing, community, education, health care, economy, commerce and trade, governance, or other) : _____
- OR
- State the question relating to material sustainability: _____

5. VENUE: ☐ → Individual/Family ☐ → Community ☐ → State/Region ☐ → National ☐ → Global Region ☐ → Global

6. CRITERIA FOR FULFILLMENT (This should be measurable) [We observe]	7. EXPECTATIONS (This involves planning) [We expect]	8. BELIEFS (And assumptions) [We believe]	9. INTERPRETED VALUES [We value]	10. INNATE VALUES
				LIFE Equality Growth Quality of life Empathy Compassion Love of Humanity

CRITERIA FOR FULFILLMENT (This should be measurable) [We observe]	EXPECTATIONS (This involves planning) [We expect]	BELIEFS (And assumptions) [We believe]	INTERPRETED VALUES [We value]	INNATE VALUES LIFE Equality Growth Quality of life Empathy Compassion Love of Humanity

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Daniel Raphael is an independent, original thinker, and futurist. He is a Vietnam veteran with 18-years experience working in adult felony criminal corrections; father of three and grandfather of four children; former volunteer fireman, small business owner, inventor, and manufacturer of a household sewing machine product; self-taught theologian, ethicist, and holistic life coach; principal of Daniel Raphael Consulting since 2003; and a remarkably unsuccessful self-published author of numerous books, papers, and articles. Daniel enjoys public speaking and has taught numerous classes and workshops nationally and internationally.

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- * Creator of The EMANATION Process, the core process of Stage 3 Democracies.
- * Creator of The Design Team Process, which incorporates the seven values and subsequent ethics and morality, the Raphael Design and Validation Schematic, and specific Design Team member roles.
- * Discoverer of the seven innate values of the Homo sapiens species
- * Creator of the Raphael Unified Theory of Human Motivation
- * Creator of the Raphael Unified Theory of Social Change
- * Originator of A Universal Theory of Ethics, Morality, and Values
- * Creator of Learning Centers for Sustainable Families
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The task of the leader is to get [her] people
from where they are to where they have not been.

The public does not fully understand
the world into which it is going.
Leaders must invoke an alchemy
of great vision.

Henry Kissinger, 1976, Time Magazine

The Design Team Process

The great benefit of having a set of timeless, universal, and irreducible values and subsequent ethic and morality is that we can use them in analytical formats as the *Design Team Process* to validate existing laws, policies, attitudes, prejudices, cultural, ethnic, racial, and gender assumptions, and social theories.



Several key elements are needed to produce the synergy of *The Design Team Process*: **1)** The “Design Team” that is composed of 5-11 team members; **2)** Specific roles of team members provide functions within the team to gather their collective intelligence during the inquiry process; **3)** The “Social Sustainability Design and Validation Schematic” that guides their inquiry and can optionally be used as a “moral compass;” **4)** The seven innate and universal values of Homo sapiens; and, **5)** The subsequent ethic and morality of those values.

The Design Team Process provides a continuation of the traditional, long history of town hall meetings that uses a rational and synergistic process to gather the intelligence of small teams of local citizens to create solutions for common community, societal, and political problems.

The Design Team Process is fundamental for sustaining the legitimacy and effectiveness of the democratic process and the survival of democratic cultures.

Fortunately, the product of Local Community Design Teams can be shared with other Design Teams in democratic nations via the Internet to resolve ongoing social, political, and financial-economic problems and to resolve related issues. The goal is to design socially sustainable social institutions that exist similarly in those nations, and to design organizations so that they, too, contribute to the social sustainability of those societies for the great benefit of all future generations.