

I. Preparations

A. Observation Skills

1. Observation without judgement

- a) Walk the property and record observations - takes notes, pictures, audio notes or mental - and make no judgement on the observations. Do not start designing anything yet.

B. Effective Design

1. Permaculture as a Design Science

- a) Technique = How
- b) Strategy = When
- c) Design = Where, combines all 3, this is permaculture

2. Systems and their construction

- a) Should last as long as possible and take the least maintenance
- b) System should provide for themselves and those who construct them (i.e. sustainable)
- c) Energy used in construction must be exceeded by energy stored/conserved over system's lifetime
- d) Whatever we do has consequence. Make the smallest change for the greatest effect.

3. Clarifying Roles within the Design Process

- a) Design Proposal documents should clarify the following in writing:
 - (1) Permaculture ethics and principles, underpinning the entire process
 - (2) Overview of design process itself
 - (3) Define agreed roles of client(s)
 - (4) Outline fees (daily rate/schedule)
 - (5) Provide short bio and body of work of designer/consultant
 - (6) Identify point at which designer/consultant's involvement ends

b) Beginning

- (1) Dream Circle: everyone speaks as to how they'd like the process to go, all commit to making each other's dreams come true
- (2) Chaordic Stepping Stones - A Guide To Create Group Process
 - (a) Need : The compelling reason for doing anything. It is the thing served by the work we will be doing.
 - i) What is the need that this project can uniquely meet?
 - ii) What does the situation require this meeting to be?
 - (b) Purpose: From the need flows the purpose. Purpose statements are clear and compelling and guide us in doing our best possible work.
 - i) If this work should live up to its fullest potential, what do you dream/envision is possible?
 - ii) What is the purpose we can adopt that will best meet the need?
 - iii) What could this work do/create/inspire?
 - iv) What is the next level for our work? Where should we be heading?
 - v) What is the simplest and most powerful question we could keep at the core of our work?

(c)Principles: Will help us know how we will work together. Must be simple, co-owned and well understood. These are crisp statements of how we agree to operate together so that over the long term we can sustain the relationships that make this work possible. These principles should be visible and referenced often.

i) What do we think is most important to remember as we design to meet the need and purpose?

ii)How will we know if we are being successful?

iii)If our team should live up to its fullest potential, what do you envision possible for this team?

iv)What are the principles we want to abide by to successfully fulfill our purpose and meet the need?

(1)When there is disagreement, how do we come to a decision?

(2)How do we decide if a decision is necessary or not?

(3)

(d)People: Map the network of people involved, that need to be brought in etc.

i) Who is in the room?

ii)Who is not in the room and how do we bring them in?

iii)How do we leverage relationships to propagate the ideas generated by our work together?

iv)Who will be interested in the results of our work?

(e)Concept: As we move to a more concrete idea of what our structures are, we begin to explore the concepts that will be useful. This is a high level look at the shape of our endeavor - beginr. For example, if our need was to design a way to cross a body of water, we could choose a bridge, a causeway or a ferry. The concept is important, because it gives form to very different structures for doing our work.

i) What are the shapes that we might choose for our work?

ii)What is the deeper pattern of our work and what organizational forms are in alignment with that?

iii)How might we activate our principles to do our best work?

(f)Limiting Beliefs: As we move to a more concrete idea of what our structures are, we begin to explore the concepts that will be useful. This is a high level look at the shape of our endeavour. For example, if our need was to design a way to cross a body of water, we could choose a bridge, a causeway or a ferry. The concept is important, because it gives form to very different structures for doing our work.

i) What makes us tremble, and what do we fear about new ways of working together?

ii)Who would we be without our stories of old ways of working?

iii)What will it take for us to fully enter into working in new and unfamiliar ways?

- iv)What do you need from our core team to feel supported in the places that make you anxious?
- (g)Structure: Once the concept has been chosen, it is time to create the structure that will channel our resources. It is in these conversations that we make decisions about the resources of the group: time, money, energy, commitment, and attention.
 - i) How do we support that aspirations of the group?
 - ii)Who are we becoming when we work this way?
 - iii)What is the lightest structure that will serve our purpose and need?
 - iv)What role might the core team play when the project is over?
 - v)How do we combine the organizational concepts to support our work and sustain the results?
 - vi)****TEAM PULSE DESIGN STRUCTURE*****
 - (1)See 4.a)(4)
- (h)Practice: The ongoing practice within the structures we build is important. This is the world of to do lists, conference calls and email exchanges. The invitation here is to practice working with one another in alignment with the designs we have created.
 - i) What do we need to sustain our work together?
 - ii)How do we leverage relationships and support the work that arises from them?
 - iii)How do we sustain and nourish our relationships and collective aspirations?
 - iv)What commitments are we willing to make to contribute to the success of our endeavour?
- (i)Harvest: There is no point in doing work in the world unless we plan to harvest the fruits of our labours. Harvesting includes making meaning of our work, telling the story and feeding forward our results so that they have the desired impacts in the world. A harvest must be planned up front.
 - i) What are the forms of harvest from our work that best serves the need?
 - ii)What intentional harvest will serve our purpose?
 - iii)What are the feedback loops that we need to design to ensure that our system self-regulates as much as possible?
 - iv)
- (3)Skills Audit: identify skills/experience held between the members involved in the design. This can be a part of the Chaordic Stepping Stones process.
- c)Meeting Techniques
 - (1)Everyone speaks once before anyone speaks twice
 - (2)Hand signals - use to communicate agreement/addition w/o interruption
 - (3)Think and Listen - good with large groups, pair ppl up, one speaks and one listens, then switch roles
 - (4)Visible,Open agendas

(5) Conflict Resolution

(a) Make "I" statements

(b) Avoid critical "you" statements -> instead "when you do that, I feel angry" etc.

(6) Decision making when there are conflicting opinions - protocol should be agreed upon by ALL parties at the BEGINNING of the design process, BEFORE disagreement happens.

(a) Firstly, celebrate disagreement - that means people are seeing something you're not! The design will be better for it.

(b) Questions to ask at this point:

i) What would happen if we do nothing? i.e. Do we need to decide on this now?

(1) If the answer is nothing, then table the decision for later, or just let it go.

ii) Do our agreed upon principles tell us what is acceptable and what is not?

iii) Is this decision unique in that it requires the creation of a new principle to handle future decisions like it?

(1) If a decision must be made but emotional/logical attachment is preventing this ask "What are the pros & cons of different options available?"

(a) People list the cons of their own idea, then switch and list pros of the idea they oppose.

(b) Once again ask if a decision now needs to be made with better understanding.

4. Structuring The Process

a) Design Frameworks - each if a cyclical process

(1) SADIMET

(a) Survey

(b) Analysis

(c) Design

(d) Implementation

(e) Maintenance

(f) Evaluation

(g) Tweaking

(2) O'BREDIMET

(a) Observation

(b) Boundaries

(c) Resources

(d) Evaluation

(e) Design

(f) Implementation

(g) Maintenance

(h) (Re)-Evaluation

(i) Tweaking

(3) Aussie Design Cycle

- (a) Identify
 - i) What? For Whom?
- (b) Investigate
 - i) Site, people, needs, issues
- (c) Evaluate
 - i) site analyses, plans, priorities
- (d) Possible Options
 - i) 1st Design Stage, best fits to site and ppl
- (e) Concept Design
 - i) broad pattern, consult clients for more details
- (f) Implementation
- (g) Observation
 - i) What's working? What's not? Impacts on site and ppl?
 - ii) Reflect, Review, begin cycle again
- (4) Team Pulse Design Structure (can be overlaid with any of the above design protocols or others)

5. Design Process

a) Yeoman's Scale of Permanence

(1) Most energy required to change to least

- (a) Climate
- (b) Landform
- (c) Water Supply
- (d) Roads
- (e) Plant Systems
- (f) Microclimates
- (g) Buildings
- (h) Subdivisional Fences
- (i) Soil

b) PASTE Overlay on Base Map - record all elements currently on/making use of the site

- (1) Plants
- (2) Animals
- (3) Structures
- (4) Tools
- (5) Events
- (6) *Also add to each item a DAFOR ranking - Dominant, Abundant, Frequent, Occasional, Rare

c) Map access points / desire lines - current and future

d) Map Zonations

- (1) note that zones can be seasonal and can shift
- (2) record as it currently stands, then think about how it might be

e) Map Sectors

- (1) when working with overlays, group directional sectors (sun, wind, fire danger, noise, light etc) and topographical sectors (frost, flooding, fire) on their own separate sheets - identify combinational sectors that create microclimates

- (2) Consider inclement weather - how is each sector affected by 100 year or 1000/10k year events?
- f) Record Water across the site
 - (1) Storage, drainage, runs, cycling (current & potential), runoff, collection points
- g) Identify limiting factors
 - (1) Unused resources typically, missed opportunities
- h) Map Site Utilities
- i) Identify resources available nearby

II. The Client Interview

A. SMART Goals

1. Specific
2. Measurable
3. Attainable
4. Relevant
5. Time-Bound

B. How do clients feel about current arrangements?

1. Overall layout - how is it meeting their needs?
2. Water, access, structure, maintenance, organic elements
3. Identify client's needs and wants
 - a) Must vs. want
4. Client's values & vision
5. Lifestyle questions
 - a) Occupations, income levels, time on site?
 - b) Ability to implement? Skills? Transportation?
 - c) Hobbies? Interests? Eating habits?
 - d) Entertainment? Family accommodations?
 - e) Personal Limiting Factors
 - (1) Physical, Emotional, Mental, Financial
 - f) Available personal resources
6. Financial Budget for Design
 - a) Communicate up-front nature of investment in this type of design
7. Site Related Questions for Walkabout
 - a) How long on site? What kind of tenure? Own, rent, lease?
 - b) Security issues w/ site?
 - c) Who owns/maintains site boundaries?
 - d) Right of ways?
 - e) Neighbors? Issues?
 - f) Where are utilities located? What utilities are currently being used?
 - g) Where are energy/resource leakages on site?
 - h) How long to storages last?
 - i) Unused outputs?
 - j) Animals?
 - k) Multi-seasonal site information/photos?
 - l) Government hogwash / restrictions?

8. Timeline

9. Personal Details

10. Anything else?

III. Analysis

A. What is the purpose of our design? KNOW THIS in addition to the ETHICS

B. Identifying Functions

1. What are the key functions in this design?

a) The most important things your clients want

b) Remedial strategies (points of intervention) that will plug the worst energy leaks (spirals of erosion on site)

C. Choosing Systems and Elements within

1. Based off required functions

2. Each element should fulfill at least 3 functions (aim for this as minimum)

a) Take each function, and systematically write down all the ways you can think of (systems/elements) to realistically achieve them.

b) Compare this list with initial thoughts and observations/ideas

c) Vet against client's goals and values to ensure congruence

d) Obtain a yield with chosen systems/elements

D. Financial Costs

1. Offer plan B's to primary desires, alternate ways of achieving same outcome

E. Time Limitations

1. Record time and material costs of all projects that you do for future reference.

F. Connect needs and yields of different systems/elements

1. Identify needs and yields of all chosen elements, match them up appropriately with intelligent placements/timestacking

a) Random Assembly Method

(1) List elements, create 3x5 card stack, have page in middle with connectors - attached to, underneath, inside, on top of, in the middle, containing, next to, beside etc.

b) Web of Connections Method

(1) Draw circle with all chosen elements around outside, then link them with each other according to daily, weekly, seasonal, supervise connections

2. Identify Intrinsic Characteristics of Elements/Systems

3. Compare Best Options

a) SWOC - Strengths, Opportunities, Weaknesses, Constraints

G. Placement