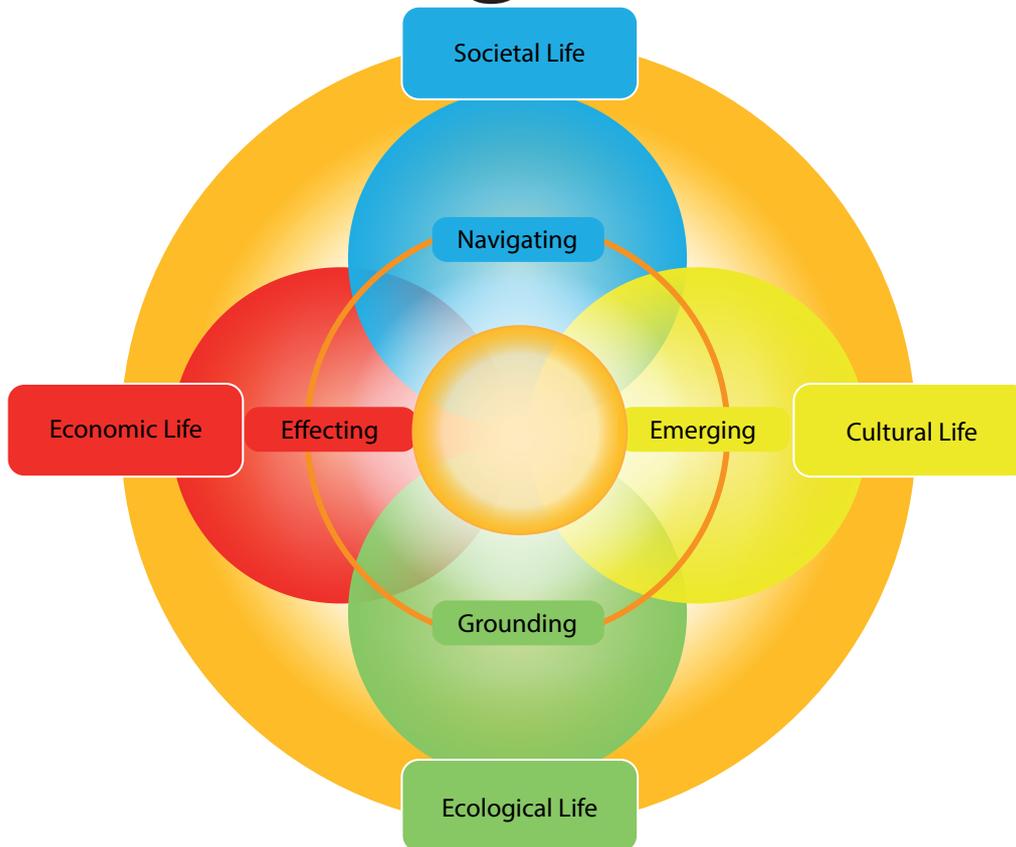


SEKEM



Integral Project Management



THE INTEGRAL WAY TO LEAD PROJECTS
IN A HOLISTIC, SUSTAINABLE WAY WITH
TRANSFORMATIVE IMPACT BENEFITING
EMPLOYEES, CUSTOMERS AND SOCIETY

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List of abbreviations

CoS	Circle of Sustainability
HIH	Hand-in-Hand
HU	Heliopolis University for Sustainable Development
HUSIL	Heliopolis University Social Innovation Lab
E.g.	Exempli gratia (for example)
IPM	Integral Project Management
PM	Project manager
PhD	Doctor of Philosophy
SDD	Sustainable Development Department
SDF	SEKEM Development Foundation
SF	Sustainability Flower
USG	University of St. Gallen

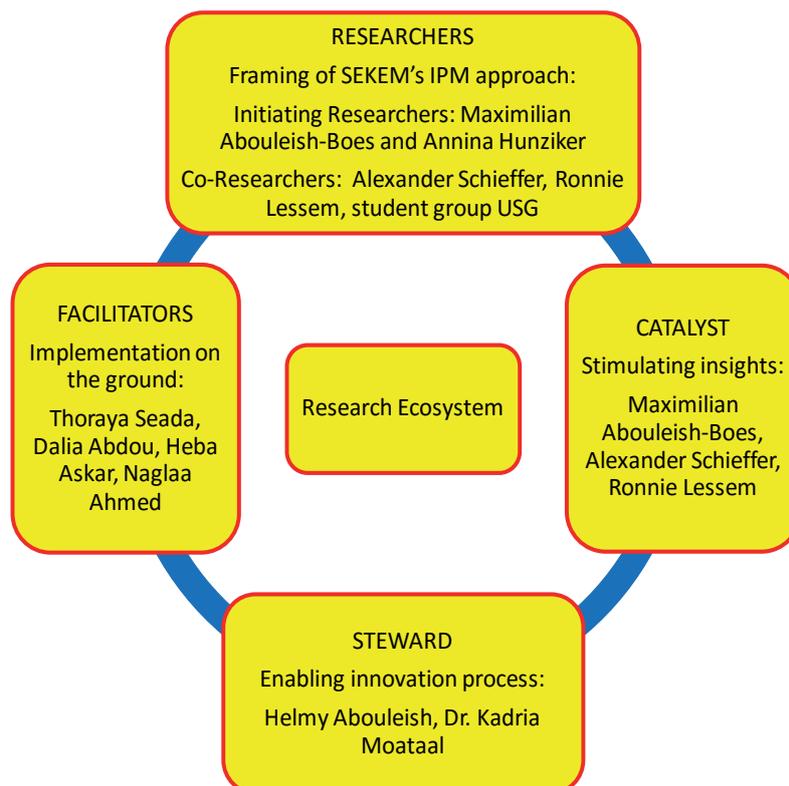
Explanation of recurring terms

Burning issue	The burning issue is the societal, technical, educational, etc. issue that calls for a solution which is met by the project.
Network	Broader network such as international organisations, local companies, international companies, etc. that are rather passive participants.
Project team	Core team of the project made out of the five roles.
Project ecosystem	The broader circle of people that contribute to, are included or are active in the project such as the local community, trainers, etc.
Trans4m	Organisation founded by Alexander Schieffer and Ronnie Lessem that catalyses transformation by creating a global movement for the integral renewal of people, organisations, societies and the planet.
Trans4m Junior Fellowship	Trans4m Junior Fellows are young agents of transformation working locally with Trans4m's partner organisations around the world to bring about integral transformation. This research-to-innovation journey was conducted under this program.

1. Introduction to the background of this Manual

This Manual introduces a new approach towards project management to take on the integral development journey that SEKEM has followed since its beginnings in 1977. The co-creation of a new integral project management (IPM) approach aims to create a differentiated picture of the roles of a project team, to define the dynamic process of a project and to visualize the outcome. The co-creation of such an approach roots in a long common journey between SEKEM and Trans4m founded by Alexander Schieffer and Ronnie Lessem. They have worked together since 2006 on the integral development of SEKEM by conducting workshops, discussions and keep up close interaction with the SEKEM community. The IPM approach is one component that developed from this exchange between the two organisations and the Trans4m Junior Fellowship at SEKEM. The Trans4m Junior Fellowship is an internship for six months accomplished in close collaboration with Maximilian Abouleish-Boes, Chief Sustainable Development Manager at SEKEM Holding, and Trans4m. It is a program conducted by young students to write their bachelor or master thesis in cooperation with SEKEM in order to create an integral solution for a burning issue. This integral solution led to the development of the IPM approach by bringing together various actors in a research ecosystem.

Figure 1: The research ecosystem that comprises actors from SEKEM and Trans4m to co-create a new IPM approach



Source: own illustration

Helmy Abouleish as a steward of this research ecosystem enabled the research process at SEKEM. Maximilian Abouleish-Boes is a core member in his role as an initiating researcher and a catalyst even over the scope of this particular research process. Trans4m was a participant of the broader ecosystem as a catalyst and researcher by being a permanent companion of SEKEM's integral development since 2006 and has regularly advised this specific research process. The University of St. Gallen (USG) student group was involved by supporting the generic development of core competencies and levels of the IPM roles.

Dalia Abdou and Thoraya Seada took over an active role as facilitators by filling the IPM roles in the pilot implementation of the IPM approach in the Hand-in-Hand Tree Planting (HIHTP) project. Heba Askar and Naglaa Ahmed participated by activating the co-created IPM tools and gave their feedbacks on them. Dr Kadria Motaal, Director of Research of Heliopolis University (HU) lend her kind support by exposing the IPM approach to the broader research community at HU, the Social Innovation Lab (HUSIL). Over the scope of this particular Trans4m Junior Fellowship, the IPM approach will develop further, facilitated by Maximilian Abouleish-Boes. This Manual is a first version and will adapt over the use of the approach in different projects.

1.1 The burning issue at SEKEM that calls for an integral solution

SEKEM integrally combines various dimensions to create an environment for holistic human development. Important for the future holistic development of SEKEM and the creation of resilient organisational structures, is to bring this integral perspective to the work of their employees. Project management as *modus operandi* in all the different dimensions was selected in order to research a new integral approach to tackle problematic issues stemming from current project management structures. At the moment, project management includes a single person oriented approach based on the project manager's (MP) experience to work with projects and to engage the project ecosystem. Therefore, the success of the project outcome depends heavily on the individual that is responsible for the project rather than on the collective effort of a team. Further, often the outcomes of the projects, the tasks assigned to people and their roles in projects are unclear. Other stakeholders involved in the project do not feel responsible for the project outcome which leads to delayings. Additionally, there is a lack of transparency between the different projects which makes synergies difficult to realise. There is no common process or formulated guideline for conducting a project that has been developed as an in-house standard. Rather the different donor requirements provide the frame for project process varying in quality. Further, there is no framework for creating and sharing knowledge about practices in project management that work well or problematically. Therefore, the experience of the project managers (PM) cannot be transferred easily to other PM or projects. This often leads to the problem that best practices are not replicated and failures are repeated. The total IPM approach was co-created in order to tackle these issues by introducing a project team with clearly defined roles, tasks and responsibilities. Further, IPM introduces a process that includes different phases to move through in the preparation, implementation and reflection phases of a project. Finally, the IPM impact matrix shows the impact of a project in the four dimensions of the Sustainability Flower (SF) for the evaluation of the project outcome and comparison between different projects. The basic concepts that underly the IPM approach are the Sustainability Flower and the Integral Development Model by Trans4m introduced in the following sub-chapters.

1.2 The Sustainability Flower as depiction of the sustainable development approach

The SF is a management and communication tool which depicts the SEKEM unique approach towards sustainable development in the four dimensions of ecological, economic, societal and cultural life.

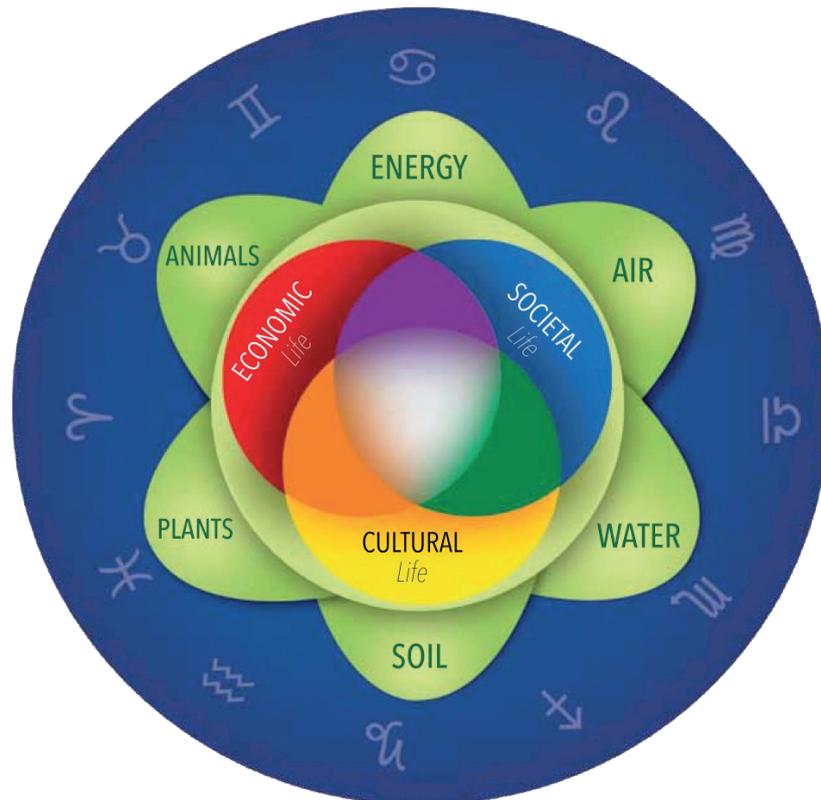
Ecological Life: "Our governing principle is not only to reduce our 'ecological footprint', but to spread life and to contribute towards a better and healthier condition of the land and the people that we work with" (Sekem 1, 2016). Therefore, it is concerned with the active uplifting and development of nature as needed under Egypt's extreme climatic and natural conditions. Hence, the ecological life is more than a mere precondition for the economic life. Dr. Ibrahim explains that every living creature is part of a network of mutual dependency and everyone is interconnected on the world. The ultimate goal is to preserve this precious balance in nature by using biodynamic agriculture methods and by reclaiming land from the desert (Abouleish, 2015, p. 50-156).

Economic Life: SEKEM understands the economic dimension as one part of a balancing act in the life cycle of people and nature. From the production of raw material in the ecological dimension, the economic dimension adds value by producing and distributing organic nutrition's, textiles and phytopharmaceutical products for the local and international market. Thereby creating a profit that is reinvested in the societal and cultural life. Another core value of the economic dimension is the creation of strong partnerships along the chain of economic activity. This idea of a closed circle of partners, suppliers and customers that associatively works together is its motor.

Societal Life: At SEKEM the societal dimension stands for the mutual respect and dignity of all human beings in society and specifically at SEKEM. It provides for the principles of equality that guides the relationships between humans. SEKEM committed to a Code of Conduct that incorporates the values of this dimension. "The place of the individual in society shapes our social relationships, while the laws of society determine individual opportunities. In a fair and just society, the individual human being is recognized to have innate rights, is equal in front of the law and granted equal opportunities" (Sekem 2, 2016).

Cultural Life: At SEKEM the cultural life is described as the holistic continuous development of values, knowledge, capacities and consciousness for individual empowerment. SEKEM describes the cultural life as: "Sustainable cultural development means individual human development. The people need to be guided to their individual inspirational sources, whether these are sciences, philosophy, religion, arts or beauty." (Sekem 3, 2016).

Figure 2: The Sustainability Flower (SF)



Source: SEKEM 4, 2016

1.3 The Integral Development Model by Trans4m

The Integral Development Model explains the generic Integral Theory of Schieffer and Lessem focusing on the topic of development of individuals, organisations or societies. The co-creation of a new IPM approach is a development journey too and it starts with the Integral Development Model. For Trans4m each development process begins with an inner calling for a change. The call emerges from a perceived imbalance from the outside or the inside of an individual, organisation or society. It has to be firmly rooted in the local context and particular situation. The model connects the inner calling with the local and global context by following along the transcultural realities, transdisciplinary realms, the transpersonal rounds and the transformative rhythms (the 4 Rs). Only by a deep engagement with all the 4R's, the call can be resolved sustainably. The 4 R's are now explained in detail:

Realities: Development work happens with stakeholders with diverse backgrounds: they represent different educational, cultural, rural, urban or social backgrounds. Although everyone takes on a different perspective, there are commonalities between particular disciplines, organisation types or cultures. Only by creating space for every perspective co-development can take place. The model includes four major perspectives representing four pools of commonalities: the 'southern' reality with a nature and community perspective, the 'eastern' reality with a cultural and spiritual perspective, the 'northern' reality with a scientific, systematic and technological perspective and the 'western' perspective with an entrepreneurial and economical perspective. It is important to become aware that there are several perspectives, to engage with this diversity of perspectives and to broaden our awareness.

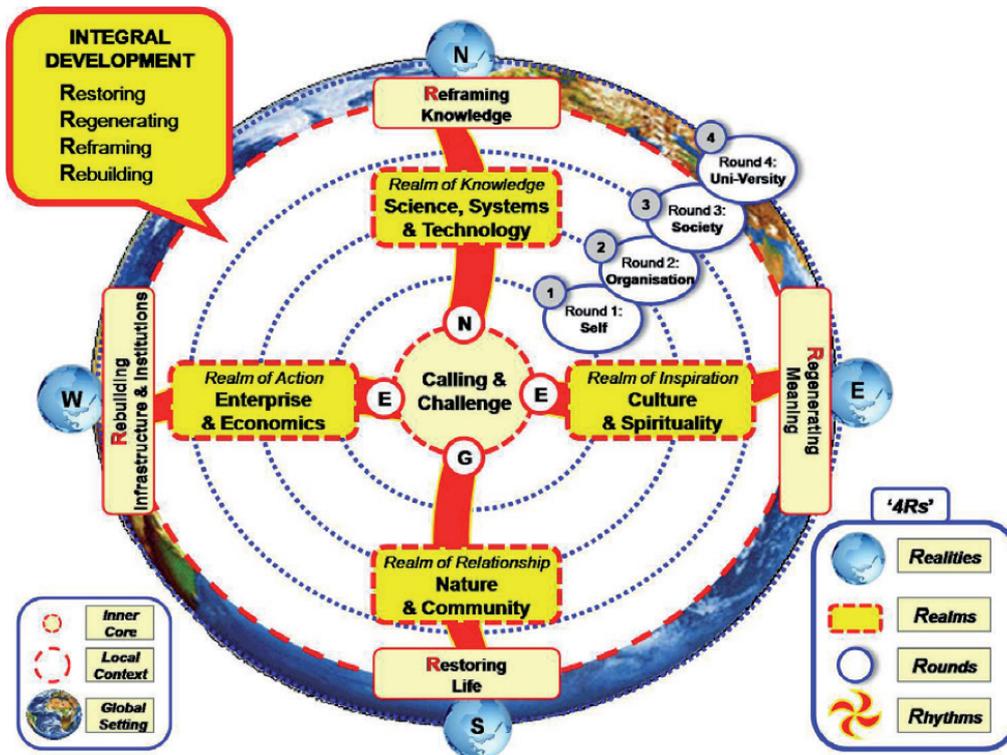
Realms: Each realm has a main theme that underpins its significance. The 'southern' realm is about restoring life in nature and community, the 'eastern' realm is about regenerating meaning via culture and spirituality, the 'northern' realm is about reframing knowledge via science, systems and technology and the 'western' realm is about rebuilding infrastructures and institutions via enterprise and economics.

Rounds: The rounds include the self, organisational, societal and global level of development. The individual perspective is the starting point of every developmental journey. By interacting with the burning issue, the individual already reaches out to the second round of organisation. The radius of exploration and understanding grows by interacting with the organisational level. In the third round, the development journey starts to engage with the community and society. Conventional development work starts immediately with this round neglecting the individual and organisational level. The fourth round is to create universality from the approach by creating new educational institutions that contribute to global practice and knowledge.

Rhythm: The rhythm brings the developmental process into action. It is the GENE-ius rhythm that follows the stages of grounding, emergence, navigation and effecting and connects the different realities, realms and rounds. It moves the process from formative grounding in the 'southern' realm, to reformative emergence from the 'eastern' realm, to normative navigation from the 'northern' realm and finally to transformative effecting from the 'western' realm.

We started with an inner calling for change emerged through a perceived imbalance. The call is then confronted with different realities according to the four realms and the developmental process moves through the four rounds following the GENE-ius rhythm. Therefore, Schieffer and Lessem (2014) called the model Integral Development as the various realities, realms and rounds are integrally forming around an inner call (p. 109-128).

Figure 3: The Integral Development Model



Source: Schieffer & Lessem, 2014, p. 111

Both of these concepts are fundamental for the development of the IPM. The SF that depicts the SEKEM unique way of creating an environment for human development is the starting point for every new integral framework. The Integral Development Model by Trans4m nurtured the IPM profoundly by creating the awareness about the importance of integrating multiple perspectives and a firm process.

2. Integral Project Management

The starting point of the development of an IPM approach was the Workshop of Trans4m at SEKEM in November 2015 about integral project management roles. They introduced a first outline of the IPM roles each related to one of the integral realities (Schieffer & Lessem, 2014, p. 98). During this Trans4m Junior Fellowship, this initial outline was further developed and adjusted to the perceived needs of the PMs at HUSIL. The IPM approach currently consists an actor level (IPM roles), a process level (IPM process) and a content level (IPM impact) to address the perceived challenges in the current structure.

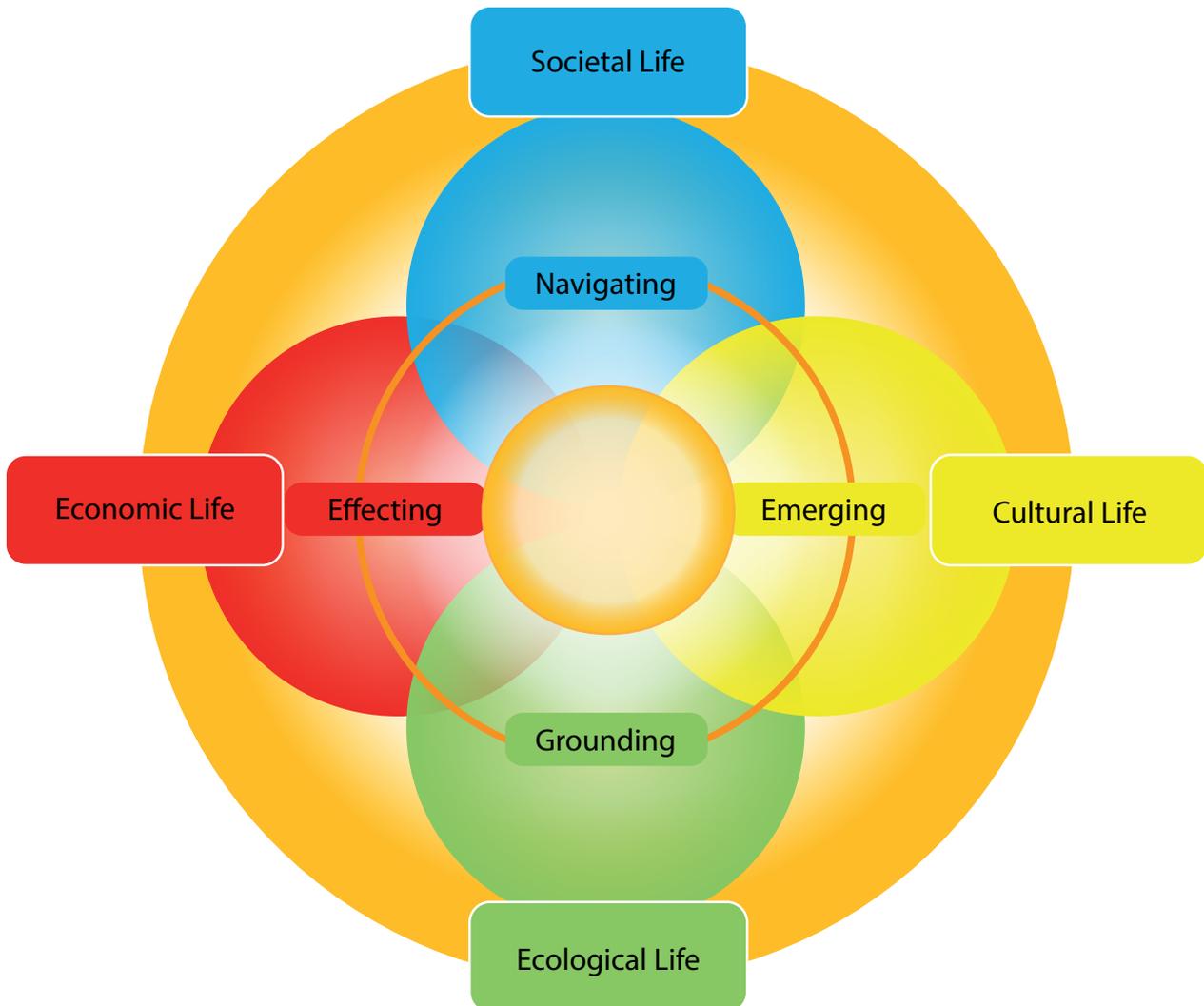
IPM roles: The five IPM roles (animator, catalyst, specialist, implementor, integrator) comprise the IPM team that mutually works on the project. Each of these roles capture a different perspective in order to guarantee a holistic view on project management. For each role we defined core competencies, a purpose to follow, tools to work with and accountabilities to conduct in the project.

IPM process: The IPM process outlines a four phased process which moves through the different phases in several rounds. Each phase is concerned with the actions according to one of the four realities of the Integral Development Model and they can run parallel or in sequence depending on the project.

IPM impact: The IPM impact matrix visualizes the contribution of the project according to the four dimensions of the SF. It serves as an evaluation tool for the team as the perceived and actual contribution are

evaluated in the end of a project. It can also serve as a communication tool for the donor organisation in order to give feedback about the end impact of the project.

Figure 4: Total IPM approach



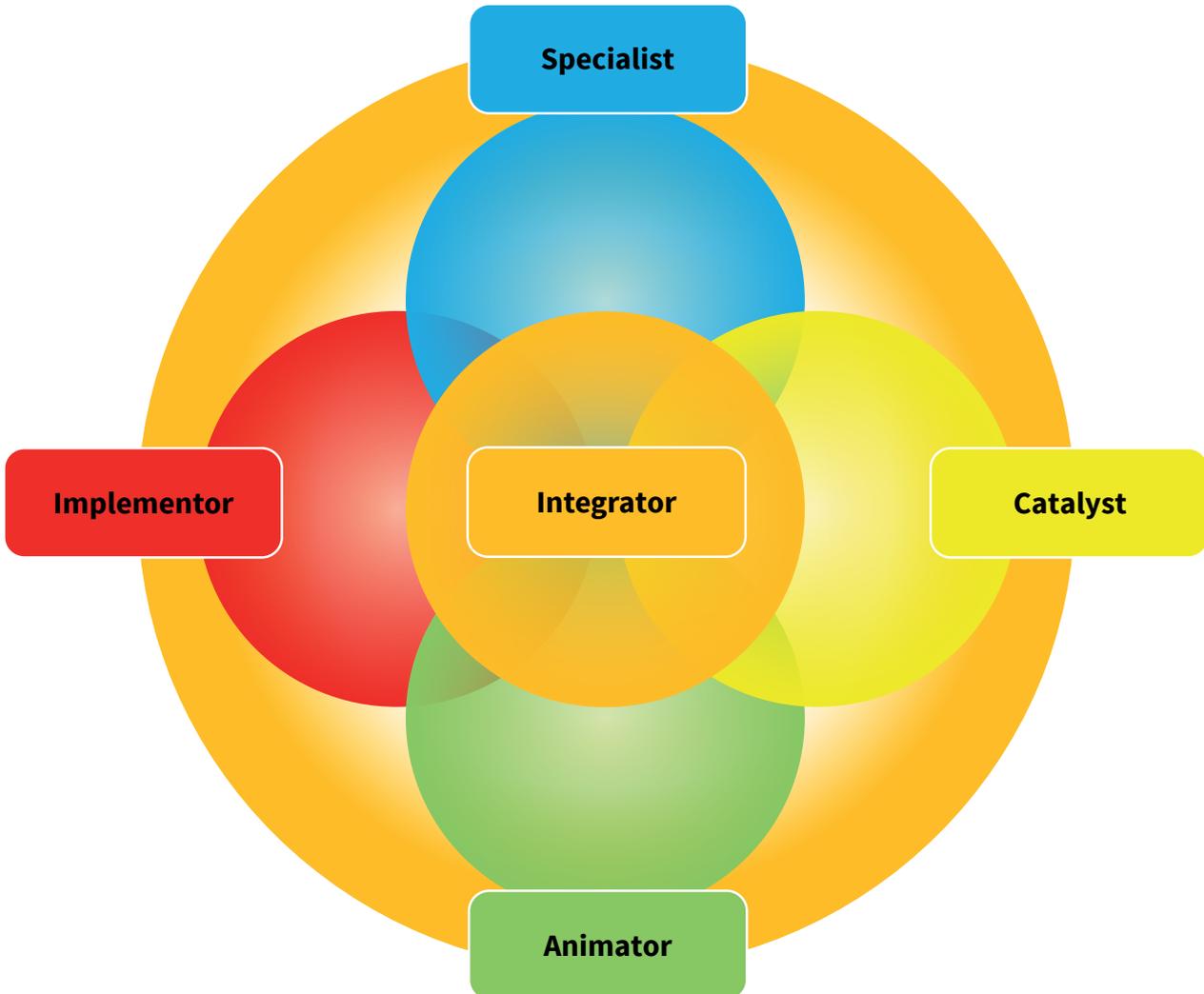
Source: own illustration

Each IPM role inhabits one circle and together they constitute a flower referring to the project team as a living organism. The roles are encircled by the IPM process that brings dynamic to the role's collaboration. The four dimensions of the SF refer to the IPM impact that builds the bridge between the projects and the SEKEM unique approach of fostering development in all four areas.

2.1 IPM ROLE LEVEL

2.1.1 What is different in an IPM project team?

Figure 5: The Integral project management team



Source: own illustration

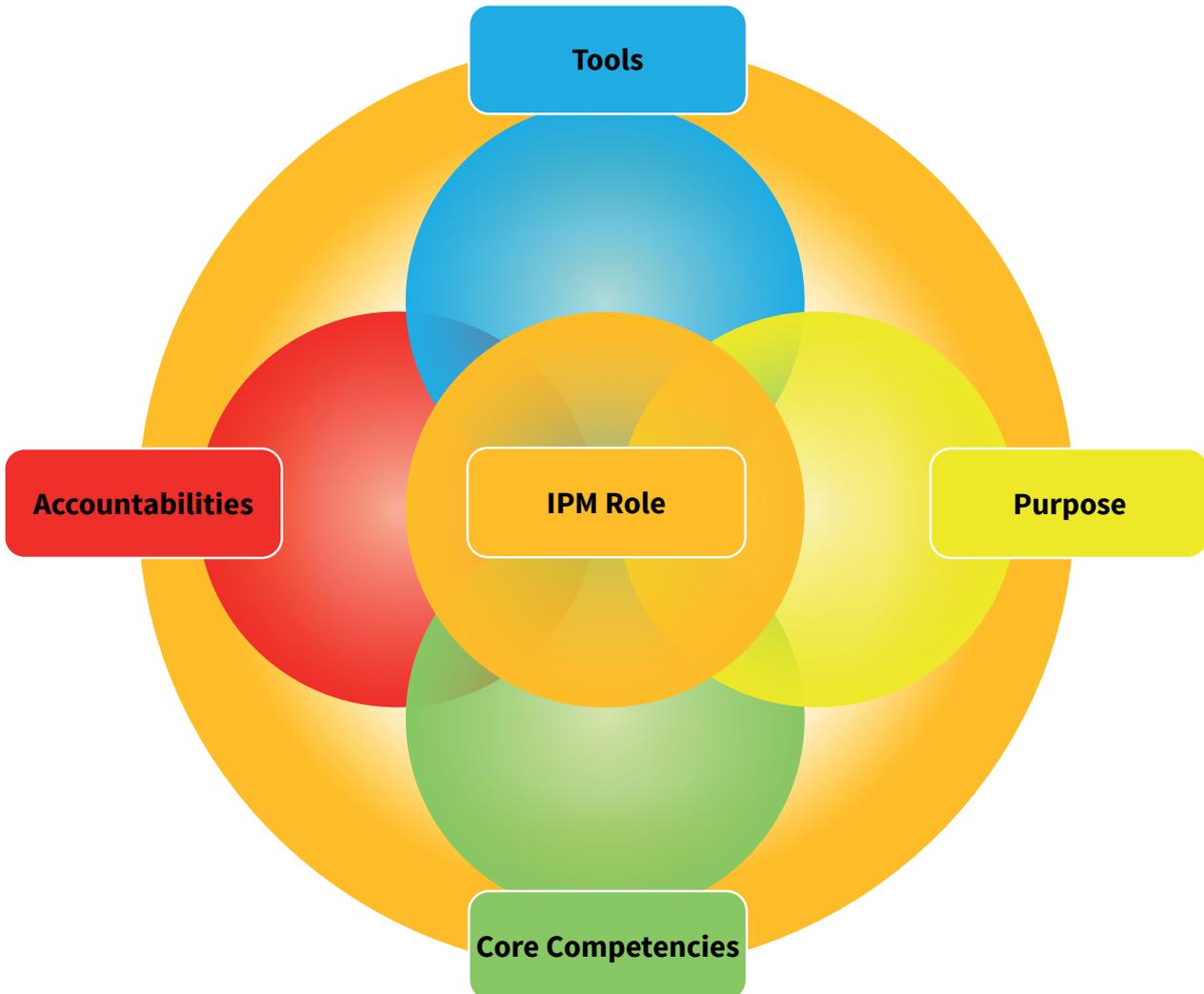
The integral project team is constituted of five different roles: the animator, the catalyst, the specialist, the implementor and the integrator. Each role aligns with one reality of the Integral Development Model in order to ensure the holistic perspective in a project. Each role looks through one lens at the project thereby ensuring that each part of the totality is understood (Schieffer & Lessem, 2014, p. 98-100). Therefore, the animator looks through a 'southern', the catalyst through an 'eastern', the specialist through a 'northern' and the implementor through a 'western' lens at the project. The integrator in the centre is the steward of the project, is responsible and assures the integration of every role in the project.

Further, one person is able to fulfil one or several roles in the same project because many people are able to engage with more than one reality at the same time. The project team itself might be constituted from one to five people depending on their ability to fill the roles. In order to match the people with the different roles the **IPM role questionnaire** has been developed which is outlined later.

The circular form of the IPM team emphasizes on the totality of the project team by the integration of all team members and the respective realities. Circles represent living systems which is the ultimate goal of an IPM team: to be a lively environment in order to conduct a project effectively in collaboration.

2.1.2 What does an IPM role include?

Figure 6: The four dimensions of the integral project management role



Source: own illustration

Each role inhibits several dimensions that follow the logic of the four realities of the Integral Development Model by Trans4m. The core competencies relate to the 'southern' reality, the purpose to the 'eastern' reality, the tools to the 'northern' reality and the accountabilities to the 'western' reality.

The four dimensions, in particular the purpose and the accountabilities of the respective roles, are a generic outline which are supposed to alter through the use of the roles in projects. Therefore, they become more adequate by applying them. Each role may adjust to the respective project as each project is different but the generic outline of the five roles should become adaptable to every project. Important is the lively and committed engagement of the PMs that fill the roles and a suitable process to change them in a governance meeting known from Holacracy.

What is a core competency?

Starting in the 'southern' reality, core competencies are the skills that each role inherits in order to fulfil its purpose and accountabilities. Core competencies are learned abilities through the relationship with nature and community and developed through education and practical experience. It is the inner nature of a role and they develop further through learning with the project environment. Each role constitutes three core competencies which are further distinguished by several levels. Levels define different stages of development of the core competencies. The outline of each role's core competencies and levels can be found in the annex on page 31. Here, the three striking core competencies of each role are outlined but there are more inherited by each role. Again, over time these competencies might develop and broaden by adapting the roles.

How does a project manager know which role/s he/she can fill?

The **IPM role questionnaire** is a tool to determine each PM's role by a self-assessment and an assessment conducted by the manager. Therefore, both map the person's core competencies with the IPM role questionnaire according to their opinion about the current level of development of the PM. The mapping leads to a visualisation of the different levels of the PM according to his own and the manager's perception. Additionally, the matrix includes the target level and the level on which the manager and the PM agree on after their discussion. Therefore, all this information is visualized in one matrix as a basis for discussion. As a developmental tool, they exchange about how the PM may reach the next level. From one level to the next the individual develops its skills further. Therefore, the IPM role questionnaire can be looked at as a tool for individual development because it fosters the exchange between the PM and its manager about the possibilities to achieve a next level.

The IPM role questionnaire and matrix can be found here:

https://drive.google.com/drive/u/0/folders/0B_ucr4cCWidGMVBSUWJhT3FwT0k

What is the purpose of a role?

The purpose of the role is the ultimate goal that a role wants to achieve and guiding principle to follow. It signifies the constant point of reference for the role, a status it wants to achieve by its actions. The purpose emerges from the 'eastern' perspective of the Integral Development Model that seeks to understand the deeper meaning of the individual existence in connection to the project team and ecosystem.

What are the tools of a role?

The tools of a role are its individual concepts that it uses in the project in order to fulfil its role. These are concepts, frameworks and strategies. Likewise, the 'northern' reality from the Integral Development Model looks at the world from a rational perspective and arranges it by using structures to create systems and concepts. The tools ultimately support the role in its execution of tasks by using structures and concepts. The references to the tools can be found in annex 4.2. There is a list provided with online sources, books or templates on Google Drive to introduce the tools for each role.

What are the accountabilities?

Finally, each role is doing recurring tasks in projects called accountabilities. These are tasks which the team can expect from the role to be conducted. As the 'western' perspective states, in this dimension the role is actively implementing and doing what it is responsible for in the project.

2.1.3 Project animator

The animator is located in the 'southern' reality and connects the project to the local community and cares about the social relationships in the project team and ecosystem. The role creates a family feeling

in the project team and introduces communication mechanisms for the local community and the team for smooth collaboration. Conflicts in the project team are taken care of by the animator because the role cares about the other's. The keywords that point out the animator's core features are: **social climate**, **local community** and **smooth communication**. The following illustration shows the particular features of the animator in each dimension which are then outlined in detail.

Figure 7: The animator



Source: own illustration

Core competencies: communication/listening skills, empathy and conflict-management (see annex 4.1.1)

As the one responsible for handling social relationships in the project, the animator should have communication and listening skills, empathy and conflict-management. Communication and listening skills are important in order to interact with the project ecosystem; the animator talks to the people, exchanges experiences and is able to attentively listens to others. Empathy supports these interactions at it is the

ability to understand and share the feelings of others. Further, conflict management is the animator's skill to discover conflicts in the project team or ecosystem with the ultimate goal to solve them and create a fruitful atmosphere in the project ecosystem. From conflicts the project team and ecosystem optimally learn for the future.

Purpose

The animator activates the project ecosystem by creating an environment in which communication runs smoothly, conflicts are solved and a learning process evolves from resolving conflicts thereby collectively working on the project.

Tools

- Problem and situational analysis
- Participatory methodologies and management
- Teamworking
- Conflict reduction
- Conflict-management
- Building partnerships
- Theory U
- Levels of listening
- World cafe technique
- Appreciative inquiry
- Template local community feedback
- etc.

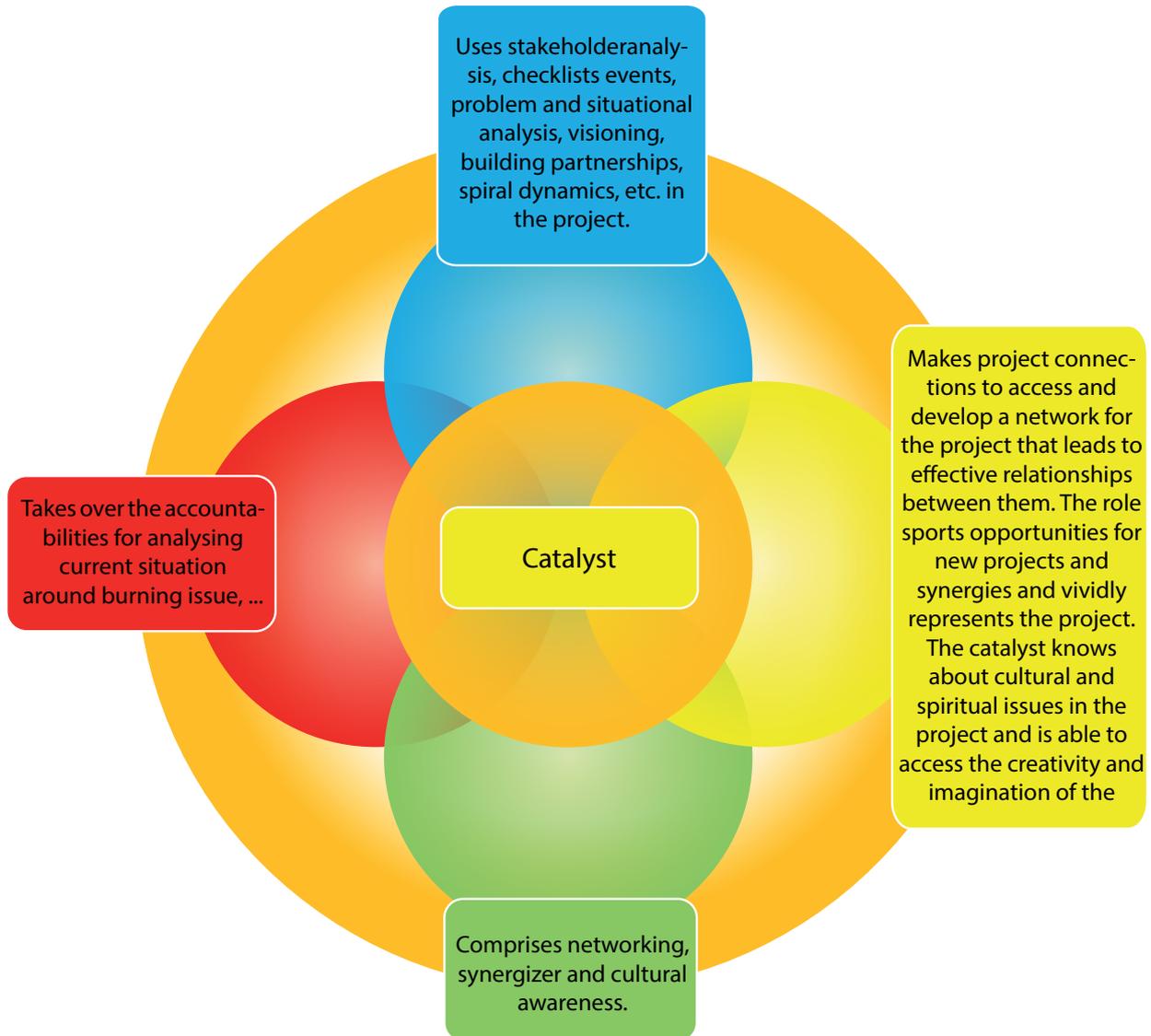
Accountabilities

- Knows its role by heart and the total IPM approach well.
- Discovering together with project team the burning issue on organisational and societal level.
- Engaging project team and ecosystem by creating a smooth communication and feedback system in the project team and ecosystem.
- Grounding the project in the local community and environment where project takes place meaning that local community is informed, can give feedback and participates.
- Establishing a family feeling and building a warm social context with local community and with the project team and ecosystem.
- Visiting project on ground on a regular basis in order to keep up interaction with people working on the spot.
- Ensuring that values/objectives of project are aligned with those of SEKEM.
- Managing conflicts in project team and between project team and ecosystem to ensure smooth communication.
- Assisting implementor in final report.

2.1.4 Project catalyst

The catalyst looks at the project from the 'eastern' lens and is able to connect projects and roles with each other. Therefore, the role is the connector between different ends thereby using lateral thinking. The role can reflect upon past, current and future projects and ideas and is able to express them in front of others. The catalyst seeks to synergize the projects and roles with each other in order to create better collaboration and common achievements. The role is actively looking for new opportunities for projects and synergies between projects. Further, the catalyst knows about the local culture, traditions and customs and how to enrich the project with such. The role creates awareness about cultural traditions and customs in order to inspire the team for creatively shaping the project. Its core features are summarized in the following keywords: **connector**, **representer** and **cultural life**.

Figure 8: The catalyst



Source: own illustration

Core competency: networking, synergizer and cultural awareness (see annex 4.1.2)

As the one connecting people and projects, the catalyst has the core competency of networking. The role can communicate with others, inspire for his ideas and create productive relationships between people and projects. Further the role is a synergizer because the role spots possibilities of collaboration in projects. The role engages with people with different value systems which implies the core competency of cultural awareness. Therefore, the catalyst needs to be aware of differences in cultural traditions and knows how to engage the project team to access their spiritual and cultural sources creatively.

Purpose

The catalyst makes project connections to access and develop a network for the project that leads to effective relationships between them. The role spots opportunities for new projects and synergies and vividly

represents the project. The catalyst knows about cultural and spiritual issues in the project and is able to access the creativity and imagination of the project team.

Tools

- Stakeholder analysis
- Checklists events
- Problem and situational analysis
- Visioning
- Brainstorming techniques
- Building partnerships
- Spiral dynamics
- etc.

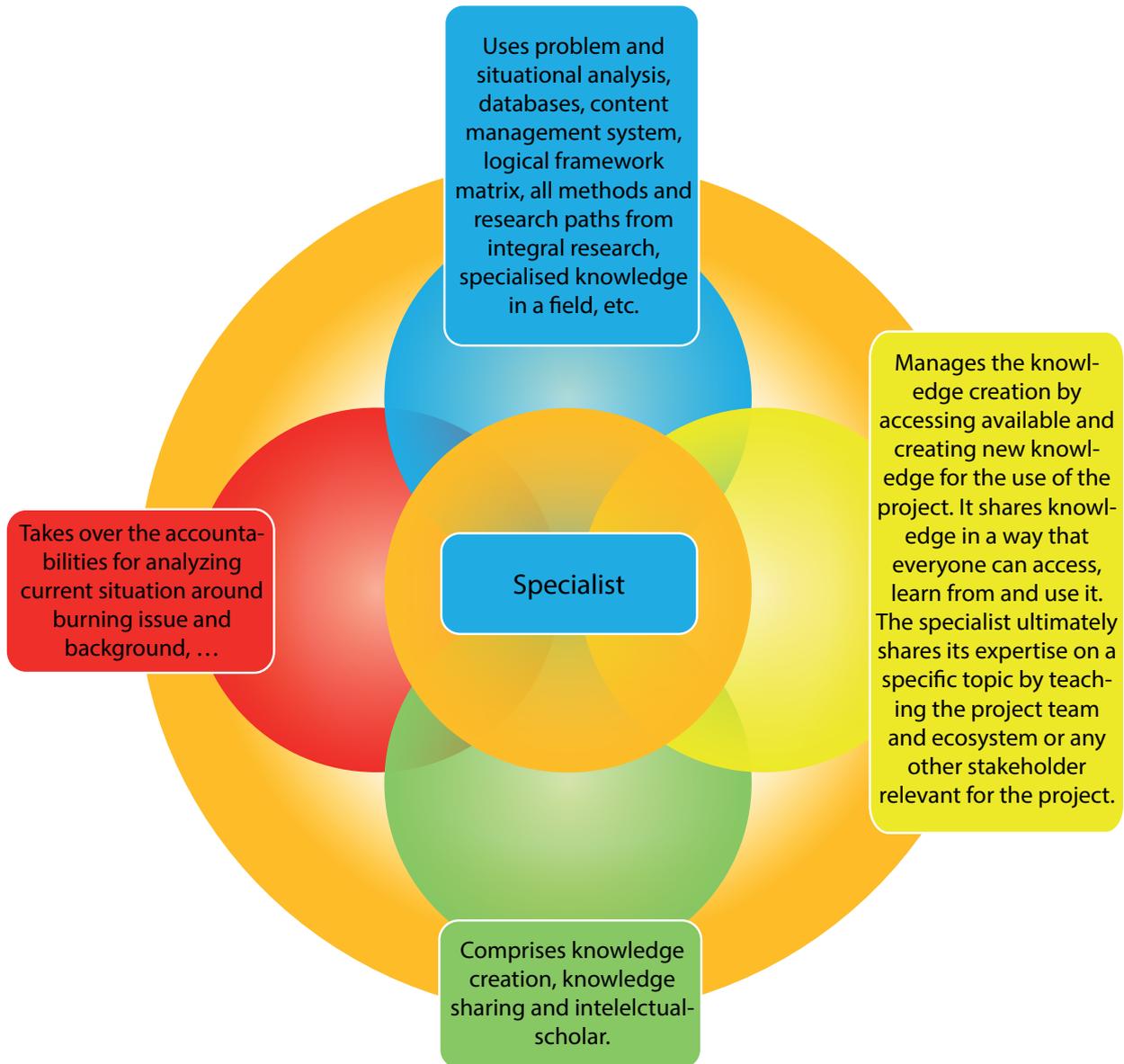
Accountabilities

- Knows its role by heart and the total IPM approach well.
- Analysing current situation around burning issue (core of project).
- Introducing new ideas such as new projects, new tools, etc. to the project team and ecosystem.
- Assessing cultural impacts on project.
- Connecting current with future projects to realise synergies.
- Supporting objective-setting process by making sure project team digs into its creativity, imagination and insights.
- Making a presentation about the overall project on google slides and keep it up-to-date.
- Monitoring and managing networks (external people and organisations).
- Communicating with the network about general advancement of project.
- Organizing content and logistics for events together with network partners.
- Organizing content and logistics for trainings and workshops together with project team.
- Using existing communication channels with network and partners of SEKEM to seek for new opportunities or partnerships for projects.
- Representing the project team at events or in meetings.
- Assisting implementor in final report.

2.1.5 Project specialist

The specialist is responsible for the 'northern' lens and supports the project team in navigating the project by creating and sharing knowledge. The role has conceptual and analytical strengths and can deal with complex content. The specialist creates information for the project, organizes it in a usable way and transfers knowledge to the project ecosystem. Further, he can detect knowledge gaps as the role knows what information is needed and what is available. It is responsible for the data collection and analysis. A deep interest in a specific area of knowledge and expertise in this area display the specialist. The core features of the specialist are summarized in the following keywords: **knowledge manager, conceptualization** and **research**.

Figure 9: The specialist



Source: own illustration

Core competencies: knowledge creation, knowledge sharing and intellectual/scholar (see annex 4.1.3)

To be able to fulfil its accountabilities and tasks, the project specialist can create knowledge by collecting data, analysing it, gather information and organize it. Sharing knowledge is a further skill of the specialist that the created or available knowledge can be accessed by the roles and project ecosystem for the use of the project. The specialist owns the core competency of being an intellectual as profound interest in areas of knowledge, being able to apply theoretical concepts and having the ability to learn and teach.

Purpose

The specialist manages the knowledge creation by accessing available and creating new knowledge for the use of the project. It shares knowledge in a way that everyone can access, learn from and use it. The

specialist ultimately shares its expertise on a specific topic by teaching the project team and ecosystem or any other stakeholder relevant for the project.

Tools

- Problem and situational analysis
- Knowledge databases
- Content management systems (e.g. Google Drive)
- Project Management platform (e.g. wrike)
- Logical framework matrix
- All methods and research paths from integral research
- Specialised knowledge in the respective field
- Scientific research methods
- Word, Excel, Powerpoint, etc.
- etc.

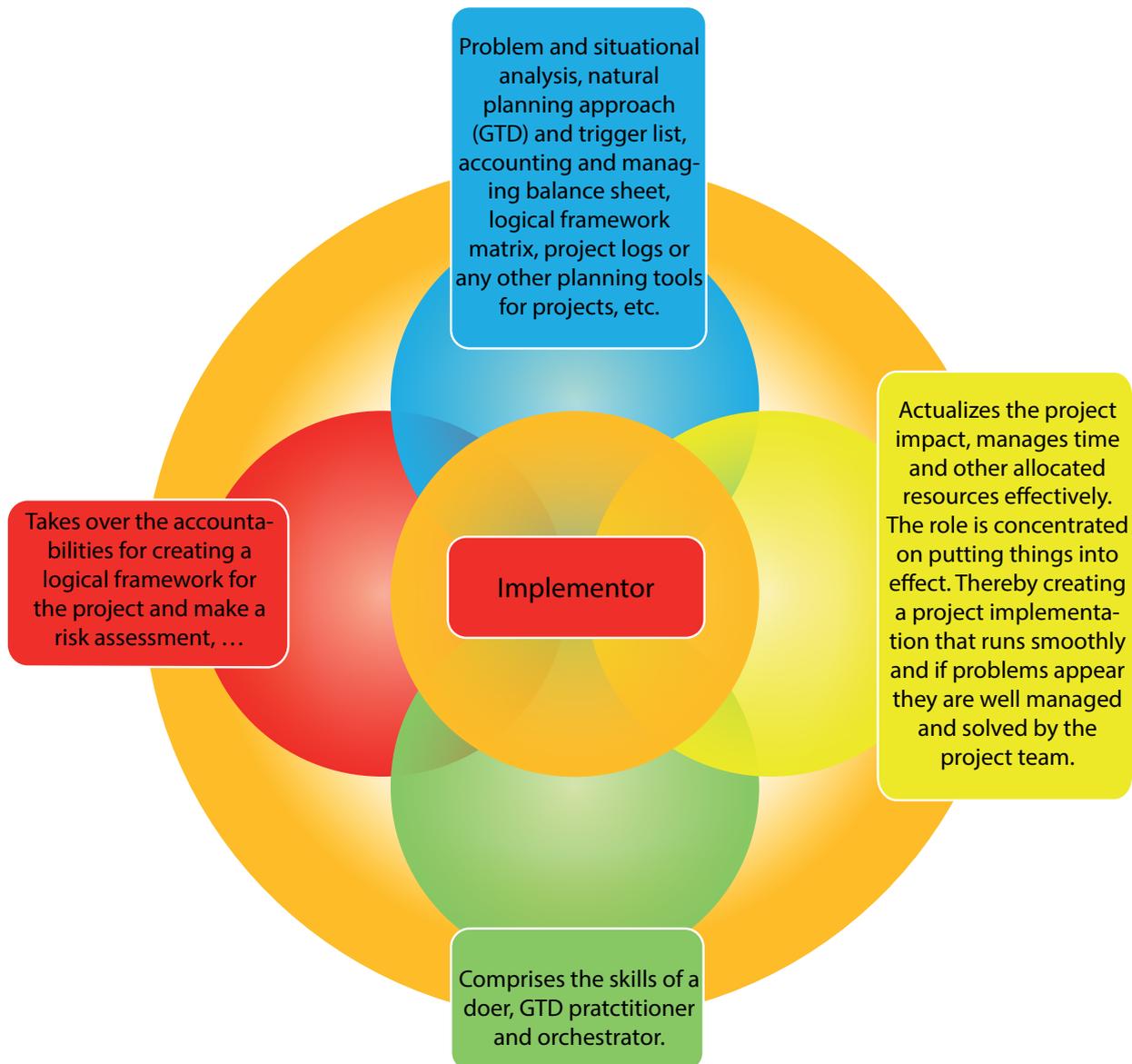
Accountabilities

- Knows its role by heart and the total IPM approach well.
- Analysing current situation around burning issue and makes research about background of burning issue connecting across all domains (economy, ecology, societal, cultural).
- Understanding current knowledge bases.
- Creating new knowledge from the roles and their experiences gained in the project.
- Conducting trainings and workshops in the project.
- Sharing knowledge in events by informing stakeholders with specialised knowledge.
- Combining acquired expertise with recognised theories, and methodologies, relevant to the project.
- Installing and maintaining of database for current project and keep it up to date.
- Creating explicit knowledge from new and available insights from project.
- Assisting implementor in final report by providing data, results and insights from research activities and background knowledge.

2.1.6 Project implementor

The implementor is responsible for the ‘western’ perspective of the project. It is the one responsible for the actual implementation of the project and for the project’s economic feasibility. Therefore, he sets the project process into action based on the previous phases of preparation. The role activates the plan and controls it to guarantee a smoothly running process. The implementor is a practical person, is able to learn from experience, focuses on next actions, sets tasks in the project and monitors advancements. Its core features are summarized in the keywords: **action**, **financials** and **management of implementation**.

Figure 10: The implementor



Source: own illustration

Core competency: doer, GTD practitioner and orchestrator (see annex 4.1.4)

In order to fulfil the accountabilities the implementor needs the core competencies of a doer, GTD practitioner and orchestrator. Doer means that the implementor can put things into practice and is an organised, time affiliated person that is able to plan, organize and control. As a GTD (Getting-Things-Done) practitioner, the implementor knows the concept well and is using it in its daily work. GTD is a way to improve the workflow by the total work-life management system that enhances productivity (Allen, 2016). Essentially it is about gaining control and perspective. As an orchestrator, the implementor is able to bring a project to conclusion by accompanying every step of action and being able to transfer the skill of the orchestrator on team level to follow up with the project (Holacracy, 2016).

Purpose

The implementor actualizes the project impact, manages time and other allocated resources effectively. The role is concentrated on putting things into effect. Thereby creating a project implementation that runs smoothly and if problems appear they are well managed and solved by the project team.

Tools

- Problem and situational analysis
- Natural planning approach (GTD) and trigger list
- Accounting and managing balance sheet
- Logical framework matrix, project logs or any other planning tools for projects
- Risk management
- Influencing and negotiating
- GTD approach to gain control and perspective
- Wrike
- etc.

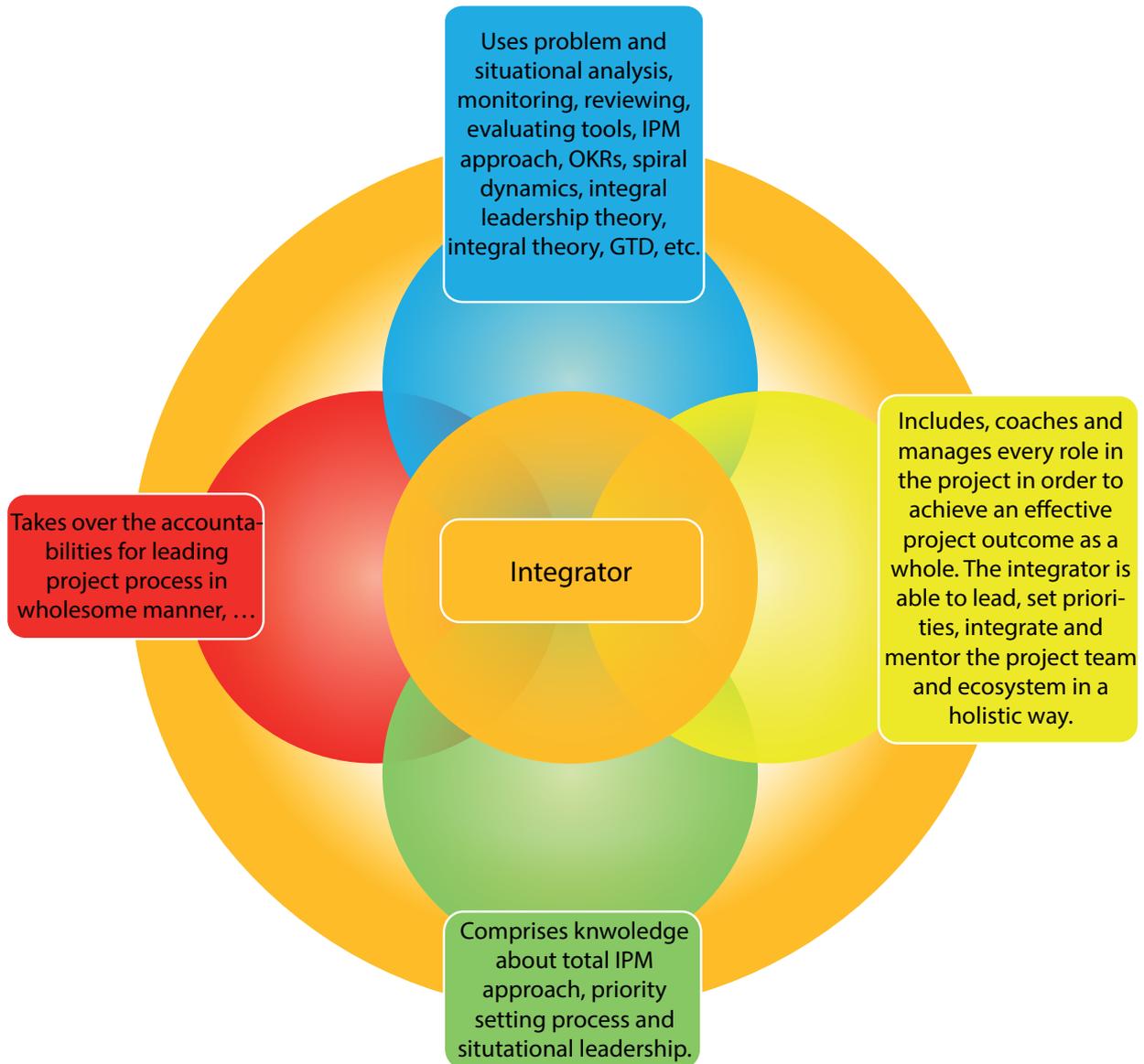
Accountabilities

- Knows its role by heart and the total IPM approach well.
- Creating a logical framework matrix for the project based on previous discussions and exchanges with project team.
- Making a risk assessment for the project by consulting with other roles if needed.
- Mapping imagined project contribution with IPM impact matrix after objectives of project are set (for later comparison when project is over).
- Setting timeline for implementation process.
- Planning, organizing, communicating and controlling, that is managing the project as a whole in implementation phase.
- Communicating within project team and follow-up on project advancement within project team.
- Assessing and monitoring of project advancement thereby comparing status quo of project with objectives in logical framework matrix.
- Setting up governance, sprint meetings and weekly circle meetings.
- Monitoring of objective-setting process for sprints and review of sprints.
- Managing financial issues of project.
- Managing other resources (material, technics, etc.) for project.
- Reporting and communicating to donor.
- Co-working with the whole project team on triangle that keeps resources - time - objectives in balance.
- Writing final report.

2.1.7 Project integrator

The integrator is the role which takes responsibility over the project, its outcome and has the overview over more than one project at the time. It is the one that leads the project and inherits an approval authority (is on a higher hierarchical level than other team members). The role sets up the project team thereby ensuring that each role is integrated in the project. It manages and monitors the project team in order to achieve a good collaboration, effective workflow and that each role brings in its individuality. The integrator is the one that ensures that through each role's diversity the project team works as a whole. It allocates the resources to the different roles (e.g. gives financials to implementor), manages the priorities of the project during all stages and takes on a leading position if needed. The integrator is responsible for the further development of the IPM Manual through each project. The features of the integrator are summarized in the following keywords: **coach**, **leader** and **developer**.

Figure 11: The integrator



Source: own illustration

Core competencies: knowledge about total IPM approach, priority setting process, situational leadership (see annex 4.1.5)

In order to be able to take over the lead and fulfil the accountabilities the integrator needs the core competencies of knowledge about the total IPM approach, priority setting process and situational leadership. In order, to constantly enrich the IPM approach by practice, the integrator understands the approach completely and adjusts it to its project ecosystem. It guarantees that integral knowledge is practiced in the project process. In order to keep the project run smoothly the integrator can set priorities in the preparation, implementation and reflection of the project. Further, to support the project team, the integrator is able to take over the lead and to effectively manage and coach the other roles.

Purpose

The integrator includes, coaches and manages every role in the project in order to achieve an effective project outcome as a whole. The integrator is able to lead, set priorities, integrate and mentor the project team and ecosystem in a holistic way.

Tools

- Problem and situational analysis
- Monitoring, reviewing, evaluating
- IPM approach
- OKRs
- Spiral Dynamics
- Integral Leadership theory
- Integral theory
- GTD
- etc.

Accountabilities

- Knows its role by heart and the total IPM approach well.
- Leading project process in wholesome manner thereby integrating the roles with their different perspectives on the project.
- Managing roles in the project thereby requesting the roles to fulfil their duties.
- Setting up project team according to IPM role questionnaire.
- Making project objectives once they are set visible for the whole project team.
- Engage with each role in order to look at the individual level of core competencies and possible development for the future.
- Coaching and mentoring IPM roles in filling their accountabilities.
- Allocating financial and other resources to the roles and in the project ecosystem.
- Owning responsibility over the project.
- Advising project team by sharing integral and IPM knowledge.
- Sharing experience with project team.
- Creating awareness about the purposes, skills, accountabilities and core competencies of the roles and how to include them in the project.
- Approves final report.

Each of the roles outlined are a differentiated description of a role model which needs to be filled by the individual PMs, hence, with life. The detailed description creates transparency and clarity about each role's tasks in the project. The following description of the process gives a dynamic to the project and the project team. It outlines how a it optimally runs and which role takes over which task during the process. Again this process is a generic guideline in need of adaptation by using it in projects.

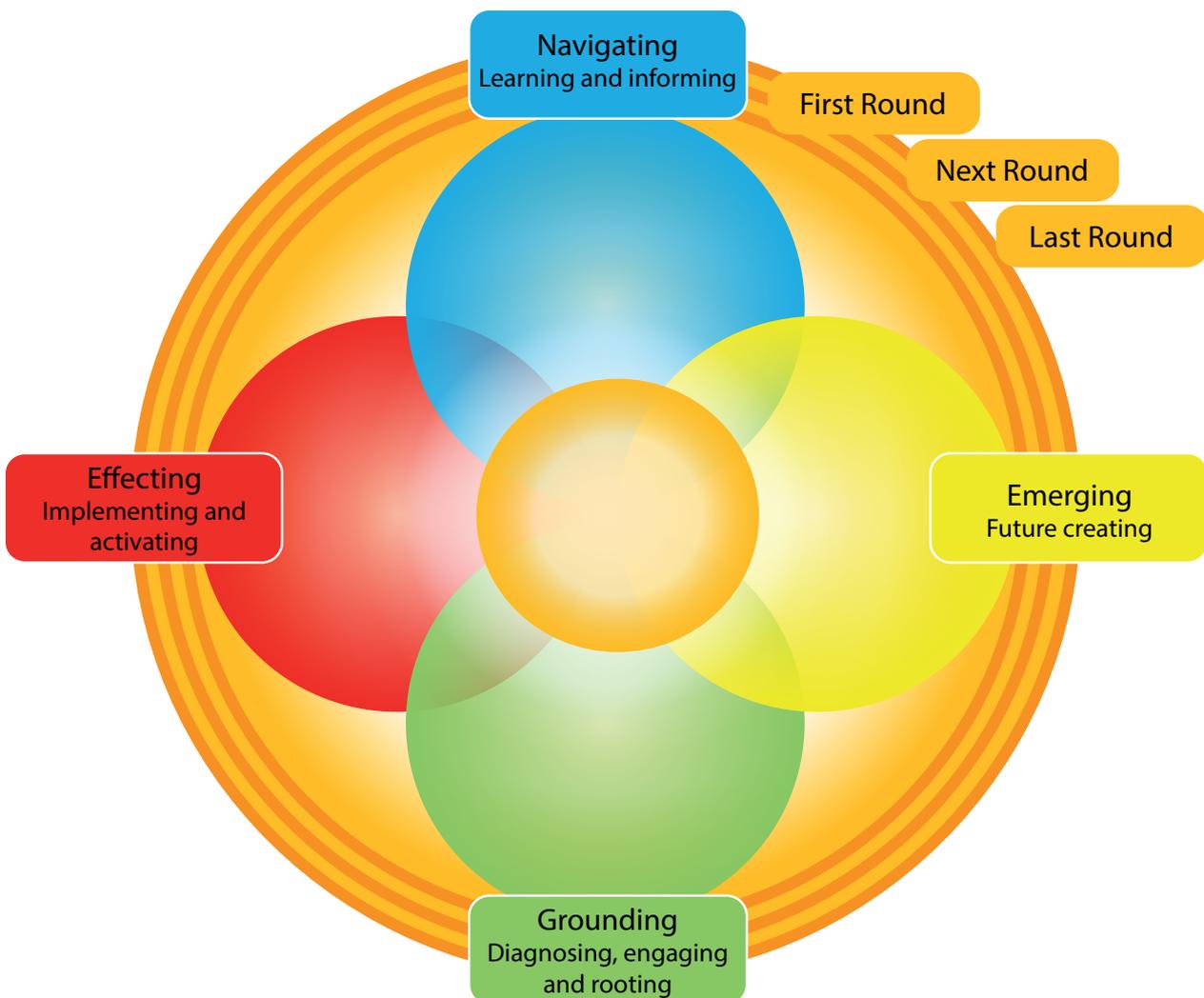
2.2 IPM PROCESS LEVEL

2.2.1 What is the IPM Process?

The IPM process is a dynamic process that outlines how projects optimally run. There are four major phases that the project passes through in a circular form. Therefore, each phase occurs several times through the project process. The IPM process bases on the GENE-ius rhythm evolved by Trans4m and introduced later in detail. The following paragraphs explain the first round of the phases in greater detail and then contin-

ues with more simplistic next rounds because aspects from the first round continue to be important in the following rounds. The first three phases (GEN) in the first round are the preparation phase of the actual implementation (E) of the project. The preparation phase is very important in order to engage the roles, gain new insights and create knowledge to have a smoother process during the implementation phase. Döring (2002) states that 80% of the work in a project should be done in the preparation phase in order to create an effective outcome of the project (p. 1-5). Further, the IPM process includes two types of meetings that enables the project team to exchange and collaborate. Finally, a checklist at the very end is included to assign each role to its tasks. It includes useful tools or supporting questions to conduct the tasks. Further supporting materials for the different actions in the process are found in a Google folder.

Figure 12: Depiction of IPM process



Source: own illustration

The figure illustrates the four basic GENE processes and the several rounds that are passed through in the project. The project team, depicted by the five roles in the shape of a flower, displays the living force of the project.

2.2.2 What is the basic concept that builds the foundation of the IPM process?

The IPM process bases on the GENE-i-us rhythm developed by Trans4m in order to bring in the dynamic

aspect to the development of human systems. It is depicted as a fourfold spiralling process which energizes the Integral Development Model. The rhythm creates a transformative exchange between the different perspectives and integrates them during the process. It is an unfolding process with many rounds thereby starting in the 'southern' dimension (Lessem and Schieffer, 2009).

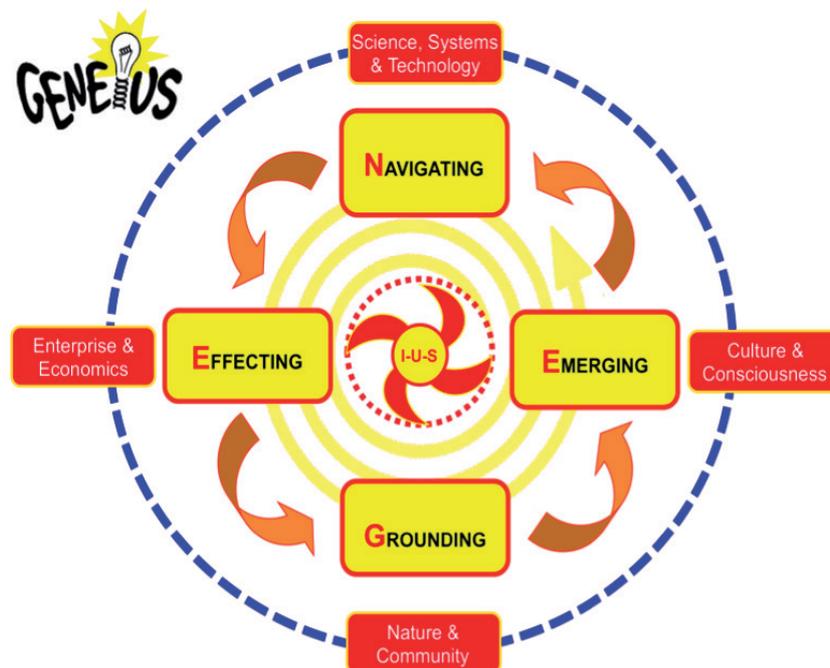
Grounding: The understanding of the nature and community of the burning issue is important in order to embark on the process of transformation. It is about the local identity in which a burning issue appears and about feeling and experiencing real life. Therefore, nature and community are activated in this phase by participation and engagement.

Emergence: The emergence creates a deeper insight for the people by lifting it to a higher level of understanding. Here people interact, dig in cultural and spiritual roots and co-create new ideas. It is about letting some of the old go and tap into unknown fields by imagine and intuitively explore new forms of human systems.

Navigation: The insight gained during previous phases are now transferred into concepts, systems and new knowledge. The ideas formulated before and insights gained are now formulated in more abstract terms and frameworks to activate the mind level of the people involved.

Effect: This phase depends on the previous stages as it collects them all together and put it into effect. It is about applying and implementing the new knowledge gained over the course of the process. Simultaneously, the new innovation is actualized but the process does not end with this stage. It is rather a first stepping stone while the process continues to go through all the stages again and again.

Figure 13: GENE-IUS rhythm by Trans4m:



Source: Lessem and Schieffer, 2009, p. 61

Accordingly, the IPM process follows the GENE-ius rhythm in order to release the full potential of the project. At the core, the burning issue that is answered by the project is the sparking core. For example, in the Hand-in-Hand tree planting project the sparking core is the sustainable tree planting in the desert to face

climate change mitigation by capturing CO2 and by improving land management (SLR, 2016, p. 1). Further, the IPM process includes two different types of meetings that bring the roles together and enables to evolve the IPM approach as such further.

2.3 The IPM Process

2.3.1 Types of meetings:

The IPM process includes two different types of meetings that are closely related to the meetings known from the Holacracy concept introduced by Brian Robertson (2015). In the governance meeting structural topics related to roles are central and in tactical meetings the actions of the roles are central.

Governance meetings:

Governance is defined as the process in an organisation by which power and authority is assigned. A governance meeting serves the purpose to improve and clarify the role structure in a project team. This meeting is about how the work in the project is done. For example, if a role feels a tension with one of its accountabilities and wants to change it, this step can be done in a governance meeting. Usually, the implementor calls and organises these meetings but can be demanded by any role (Robertson, 2015, p. 20-65). The following link will guide you to the Holacracy Constitution where the process and decision-making is explained in detail from page 9:

http://www.holacracy.org/wp-content/uploads/2015/05/holacracy_constitution_v4.0.pdf

Tactical circle meetings:

Robertson (2015) created by best practice the tactical meetings to move fast through the issues that could not be solved during the week in order to synchronize the team that would slow down the progress of the project. After the first check-in round in which each person gets present in the meeting, several stages were designed to create a picture from the reality of the project. The first stage includes checklist items (checklist points are recurring items), the next metrics items (metric reports that highlight latest data) and the third gives space to share updates on the projects. After, the overall agenda is built depending on the people's perceived problematic issues. Then the agenda is resolved by going through each issue in a specific way of decision making and problem solving technique. Additionally, special topic meetings can be hold to discuss specific topics which do not follow the same procedure (p. 60-65). The following link will guide you to the Holacracy Constitution where the process and decision-making is explained in detail from page 19:

http://www.holacracy.org/wp-content/uploads/2015/05/holacracy_constitution_v4.0.pdf

Two types of tactical circle meetings are held in the IPM process:

- **Sprint meetings:** sprint meetings are held approximately every month. It is the time where the project team sets the objectives for the next sprint (the time until the next sprint meeting). Each role knows exactly what its actions are and the next sprint meeting reviews what was achieved, what can be improved and which objectives are set for the next sprint meeting (Mountain Goat Software, 2016).
- **Weekly circle meetings:** the project team meets weekly in order to exchange and keep up the collaboration in the project. Therefore, problems, challenges, and next actions are discussed in the project team in order to create a smooth workflow (Mountain Goat Software, 2016).

2.3.2 First round

The first round of the IPM process is mainly contributed to the preparation of the project in the different phases. Each role is responsible for the respective phase: The animator for the Grounding, the catalyst for

the Emerging, the specialist for the Navigating and the implementor for the Effecting. The integrator is in charge of the overview and the integration of all roles in the project.

Grounding

The first phase called Grounding discovers the burning issue which is answered by the project. The Integral Development Model (Schieffer & Lessem, 2014) explained that the inner call of change for development starts the developmental process. Similar, the burning issue is the initial starting point for a new project which ultimately seeks to solve either a developmental, research, technical, educational or related issue. The Grounding phase roots the project in the local community and the natural environment that surrounds it. It is divided in the diagnosing of the burning issue, the engagement of the project team, ecosystem and network and an early navigating.

Diagnosing

- Discover burning issue on organisational or societal level that is directly addressed by the project (e.g. climate change). Methods to discover the burning issue include observation, questionnaires, data analysis, discussions with local communities, ideas inspired from international organisations or management decisions.
- Analyse current situation in relation to the burning issue that is answered by the project including political, economic, social, technological, legal and ecological issues. Here the burning issue is analysed in order to create a common basis of understanding to move on in the project.
- Analyse local context in order to get an overview over the circumstances where and in what circumstances your project takes place.
- Research background of burning issue in order to embed it in the bigger societal context of Egypt or the world. For example, the HIH project answers the burning issue of climate change by planting trees in the oasis in order to support the ecosystem and combines it with an educational approach to bring students from HU closer to the topic. Climate change is a topic that concerns Egypt in particular due to rising sea levels, desertification and other issues that arise. Climate change is also a global phenomena that connects the project to the world.
- Assessment of risks: assess potential risks that the project might face during preparation and implementation phase (see Google folder for template).

Engaging

- Addressing project team: set up of project team by using IPM role questionnaire in order to find suitable people for the project team.
- Consult as widely as possible, get advice on key people who should be part of the project ecosystem or networks and engage project ecosystem and relevant stakeholders.
- Make stakeholder analysis in order to create knowledge about all the stakeholder involved, their interests and potential conflicts that may emerge (see Google folder for template).

Early navigating

- Install project management platform/ infrastructure (e.g. wrike) to track actions and sub-projects of the project.
- Create database for project and knowledge sharing platform (e.g. Google Drive) and adjust it to wrike.

KICK OFF MEETING

The Grounding phase ends with a tactical circle meeting that signifies the official kick-off of the project and the commitment of the project team to mutually work on the project.

Emerging

The Emerging phase is where the goals of the overall project are set, hence, future creating processes take place which are defined as where the future of the project is determined. It is prepared by the Grounding phase that rooted the burning issue of the project in the local context. It is the stage where intangible knowledge from culture and spirituality should enrich the goal setting procedure facilitated by the catalyst. Therefore, look at cultural or historical practices that could be used in your project or inspire your objectives (e.g. irrigation systems were already used in Ancient Egyptian times, tree planting at SEKEM has a tradition since the 80s). Further, new connections between roles and projects are analysed by assessing potential synergies. All these actions contribute to the creation of the project goals, thereby creating the future path for the project and enabling the collective journey towards the project goals.

Future Creating

- Connect project to local culture and spirituality: Dig in the cultural and spiritual background of the organisation and the people involved in order to look for potential solutions that lead to objectives of the project (e.g. meet local community and drink tea, talk, visit people's homes, discussion with project team and exchange of ideas).
- Set overall goals: work out goals and targets of project and make them visible and accessible for all involved stakeholders.
- Align goals of the project with overall vision of SEKEM thereby ensuring that project is in alliance with SEKEM's ideas.
- Brainstorm with project team about the path to achieve the objectives: who does what and when. Therefore, think about how logical framework matrix will be outlined and where next actions and meetings are documented (you can also use write to track the next actions).
- Map imagined project goals with IPM impact matrix. It serves as evaluation tool after the project is over to compare it with actual achievements of the project (see Google folder for template).
- Assess potential synergies with former projects, other teams, with known networks and international organisations.

The Emerging phase is where the first sprint meeting serves to brainstorm, exchange ideas and set the overall goals of the project and to agree on the objectives to be reached in the next sprint. Therefore, it establishes collectively the creation of the future path of the project. After the first sprint is completed, it is analysed by the project team in order to set new objectives for the next sprint and align them with the overall goals of the project. At the same time, the weekly circle meetings start in order to discuss tactical issues such as problematic issues, next steps, communication with project team, ecosystem and network. Tactical circle meetings can be called by the implementor with the whole project team or conducted by the respective roles that need to discuss an issue.

Navigating

In the Navigating phase the knowledge and information for the project is collected, the place to store and exchange knowledge installed and data needed for the project or created by the project collected. It is all about creating and sharing knowledge for the project itself and to create concepts, presentations, and frameworks to support the following process.

Informing and Learning

- Understand knowledge bases for the specific project (e.g. PV solarpumping = electrical science, PV engineering, agriculture, hydraulics, etc.).
- Collect data and knowledge needed for project (e.g. including specialists, data analysis, interviews, market research, local investigations, trainings, etc.).
- Plan for needed workshops and trainings for the project ecosystem and stakeholders.
- Database created for project.

- Write down plan, strategy, work packages (WP) in logical framework matrix. It helps to have a guidance through the whole project process and needs to be adjusted over the process with the actual developments (see Google folder for template).

In the Navigating phase governance meetings, sprint meetings and weekly circle meetings serve to create a smooth project process and good collaboration between the roles. The created structures, templates and frameworks for project support are updated regularly during the Navigating phase for the use in the Effecting phase.

Effecting

In the phase of Effecting the project is implemented by building on the three phases of preparation (GEN). The project is actualized in this phase but does not end with it but rather starts a new round. The plan is set in effect and revised regularly. The project process documented and re-assessed and priorities adjusted. In this phase, the roles start to build routine by using the tools and working on the implementation.

Implementing

- Implement project by executing planned actions.
- Document the project process continuously by using the prepared templates and frameworks from the Navigating phase (see Google folder for templates).
- Manage finances of the project as one major component of a successful outcome of the project.
- Revise project plan and strategy periodically: keep resources, objectives and time in balance.
- Set new priorities for actions if needed.
- Conduct on spot visits of the project, engage with local community and use the feedback mechanism to bring in their ideas and concerns.

All the processes from the previous phases lead to the distilled actions of the Effecting phase by setting the project in effect. All these processes were thought through, planned, lead, monitored and controlled - but they are all not fully projectable nor controllable. Therefore, the next rounds are here to adjust to unforeseen developments in the project.

2.3.3 Next rounds

Once the first round of actions is accomplished and the implementation of the process started each phase (GENE) is reviewed according to the project process. For example if after the installation of a new machine or technique the data collection starts, the phase of navigation is affected. Therefore, the different phases can run parallel or sequential to each other. The IPM procedure is therefore a dynamic circle.

Grounding

- Assess and compare burning issue with status quo of the project.
- Include continuous feedback from project ecosystem and local community.
- Keep up good communication and collaboration in project team and ecosystem for smooth process.
- Manage conflicts in team and ecosystem.

Emerging

- Compare status quo with set objectives of the project and seek improvements where it is needed.
- Set new priorities according to project development.
- Nourish and manage networks.
- Represent project in conferences, meetings and other gatherings important for the project.
- Realise synergies with other ongoing projects.

Navigating

- Continuous research and data collection - knowledge creating and sharing.

- Manage and update knowledge sharing platform (Google Drive) and project management infrastructure (wrike).
- Conduct trainings and workshops.

Effecting

- Monitor project advancement continuously.
- Allocate and manage resources according to the project development.
- Set priorities according to the advancement in the project and monitor process well.

2.3.4 Last round

Once the project is finished, the last round takes place in order to create a learning process for the team. Therefore, each phase is reflected upon and asked what each role has learned, what improvements could be made for the next project, what has worked well and what not. Here, the project is communicated, discussed and reflected with all relevant stakeholders. At the same time the roles and their accountabilities are reviewed in order to adjust the IPM Manual.

Grounding

- Feedback of local community about project contribution and reflection about the impact on local community.
- Create long-run support system for project contribution.
- Reflection about communication within project team and ecosystem.
- Discussion of recurring conflicts in the project team.
- Reflection about changes for the community and the environment due to the project.

Emerging

- Reflection about Emerging phase and achieved contributions and discuss new insights
- Map project impact with the IPM impact matrix and compare it with imagined project contribution from the beginning. It serves as an evaluation tool of the expected and actual outcome to uncover problematic issues and areas of improvement.

Navigating

- Research report written.
- Reflection about Navigation phase, specifically about the knowledge creation and sharing during the project and about installed structures and concept to support it.

Effecting

- Adjust IPM Manual for future projects.
- Report writing for donor and in house reporting.
- Reflect about Effecting phase and financials with the respective stakeholders.
- Celebration of end of project.

The last round ends with the celebration of the project end by the project team. It serves as a common ending point for the project.

In summary, the IPM process lines out a guideline for a project to follow from the preparation phase, to the implementation and finally to foster a reflection process in the project team. The four phases of the GENE-ius rhythm are run through several times during the process and assures that the different perspectives of the roles are integrated in the process too. Thereby bringing an integral dynamic to the project. The Checklist that summarizes the actions of each and the tools to accomplish the actions are found in the annex 4.3. Further, the same structure is implemented in wrike (a project management platform) to assign the tasks to the respective roles.

The next chapter is concerned with the content level of the IPM process thereby introducing how the project's contribution can be mapped by a matrix to increase transparency and clarity about the project's imagined and actual outcome. Further, the content level aims to bridge the role and process level with the outer world - meaning that the project's impact is depicted according to the four dimensions of the SF. Therefore, it connects the projects with the SEKEM unique way of developing human beings by working in the four dimensions.

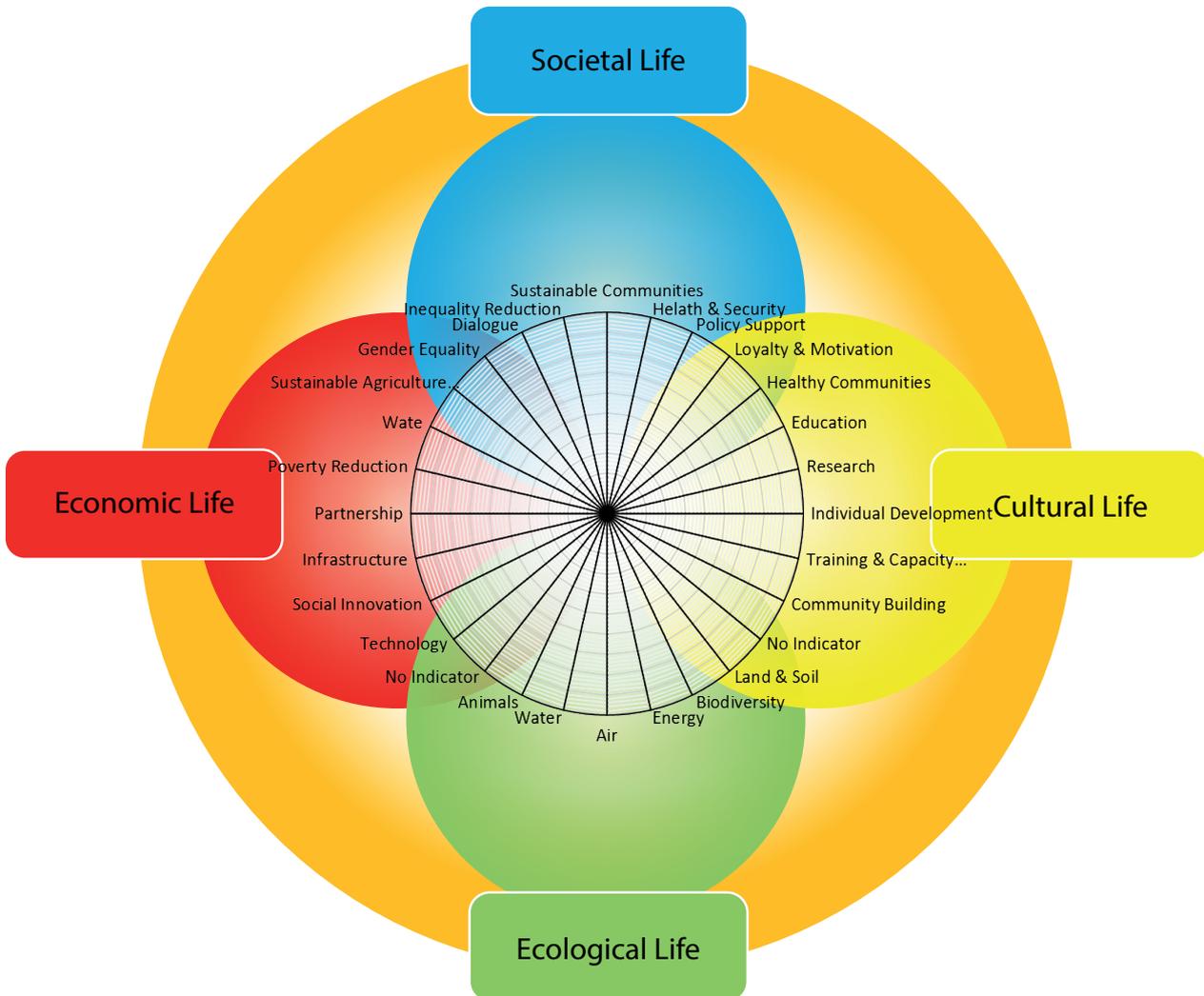
2.4 IPM IMPACT LEVEL

2.4.1 What is the IPM impact matrix about?

The IPM impact dimension enables a project team to visualize the contribution of the respective project in the four dimensions in which SEKEM operates. The **IPM impact questionnaire** can be used as a holistic evaluation tool of an individual project. Firstly, the project's objective can be visualized at the beginning (stage of Emerging) to see what the overall goals of the project are. Once the project is completed, the second mapping of the project shows the actual achievements of the project. The comparison of both in the end will help the project team to analyse areas of improvement. As the team is collectively working on this evaluation it should enhance a learning process for future projects and improve teamwork. Further, it is a tool to increase transparency over the sum of the projects at SEKEM and HU. The **IPM impact questionnaire** builds a common basis for comparison and shows where the projects are located in the four dimensions. Therefore, the tool links the projects to the societal impact of SEKEM in the four dimensions.

For now, the questionnaire asks for six to seven indicators of contribution in the four dimensions. In the future, each project team might develop a project specific contribution visualization on top of this general one. At the beginning, each project team would ensure that indicators and dimensions are individually adjusted to the specific project. After the project is finished, external beneficiaries can use the questionnaire as a tool to give detailed feedback on the project outcome.

Figure 14: IPM impact matrix



Source: own illustration

IPM impact matrix to visualize the project's contribution in the four dimensions of the SF.

2.4.2 How can the project team map its project?

The IPM impact questionnaire is a tool with which the project can be mapped by answering the questionnaire. The questionnaire is divided in four dimensions according to the areas of activity of SEKEM. Each question asks about one specific indicator and each dimension includes six to seven indicators. The project team can scale the indicator from none (zero contribution) to 9 (vibrant contribution).

Please follow the link and wait for the IPM support to return your individual matrix: https://docs.google.com/a/hu.edu.eg/forms/d/1zAoOTtL-xluEhuvIQNvPmIh6TCami4hY_Vb-VmS4krE/edit?usp=drive_web

2.4.3 What does the IPM impact questionnaire include?

The content of the questionnaire is divided in the four areas in which SEKEM is active as depicted by the SF at the beginning of this Manual. The SF "represents a management, assessment and communication tool symbolizing the concept of sustainable development in its four dimensions": economic life, societal life, cultural life and ecology with its six sub dimensions (Sekem 1, 2016).

2.4.4 What are the influxes of the indicators?

The indicators of the IPM contribution questionnaire are a collection of various sources that are all important to measure sustainable development. In the following paragraph each of the references are shortly outlined and explained how they helped to evolve the indicators.

Sustainable Development Goals - the 2030 Agenda for Sustainable Development: These goals are the UN agenda for sustainable development until 2030. The different goals were divided into the four dimensions of the SF in order to create comparability between the goals and the tool of SEKEM.

Sustainability Report - SEKEM: The sustainability report is a yearly report about SEKEM's sustainable development which is perceived as the core business of the whole initiative. Therefore, a report was developed in order to measure specific indicators in all the four areas in order to assess and evaluate the development on a monthly and yearly basis (Sekem 6, 2016).

Circles of Sustainability: It is an approach to depict cities, communities and organizations according to their sustainability. The profile circle tool was used for the IPM impact indicators because it offers a set of indicators which are used to measure and visualize sustainability (Circles of Sustainability, 2016).

Demeter Report - SEKEM: SEKEM is an active member in the Demeter association in Egypt. This association released a report which explains the general principle that the association follows. The report served as a reference in order to understand the indicators of the ecological dimension (Demeter, 2016).

Sustainability Flower - SEKEM: see chapter 1.2 on page 02.

Self Assessment Tool - EDILE: EDILE is the short term for Economic Development through Inclusive and Local Empowerment. It is an organisation that follows a local approach to support investments in the area of "sustainable development, inclusive growth, youth employability and women empowerment" (Edile, 2016). Further it created a tool in order to measure the project's impact in an economic, social, environmental and community dimension (Edile, 2016).

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4. Annex

4.1 Core competencies and levels of different roles

4.1.1 The animator

Core competencies (South)	<ul style="list-style-type: none"> • Communication/listening skills • Empathy • Conflict-management
Levels for communication/listening skills	<p>As a person with communication and listening skills, I have repeatedly demonstrated that...</p> <ol style="list-style-type: none"> 1. I can interact with the project team by using my basic communication and listening skills. I am generally available via email and phone and able to answer on requests within a working-day. 2. I have experience in the area of communication in projects. I am able to use communication tools such as Emails, Google Drive, wrike, etc. in a basic way to stay in touch with the project team and engage in a virtual dialogue (not “face-to-face”). 3. I know how to avoid misunderstandings and create a common understanding on mutual expectations between me and the project team. If I meet people from the wider project ecosystem I can give basic information about my work in the project. 4. I am able to use my communication/listening skills in order to support the interaction of the project team. I can use above mentioned communication platforms for team communication and create new documents, folders, and streams to stimulate interaction among team members. 5. I can communicate with external stakeholders (including local community) with strong guidance and I am able to create documents and content that can be send to to the wider project ecosystem with strong support and final quality & language check. 6. I can proactively and professionally communicate with external stakeholders without guidance and I am able to create content that can be send to to the wider project ecosystem without support and final quality check. I can anticipate information needs form project team and external ecosystem and address them timely. mmunicate with external stakeholders without guidance and I am able to create content that can be send to to the wider project ecosystem without support and final quality check. I can anticipate information needs form project team and external ecosystem and address them timely. 7. I reached a level to train and assist others in developing their communication and listening skills. I can be responsible for high level communication with external stakeholders.

<p>Levels for empathy</p>	<p>As a person with empathy, I have repeatedly demonstrated that...</p> <ol style="list-style-type: none"> 1. I know my own feelings and I am able to express them. I am able to engage with other people while respecting their feelings, thoughts & experiences. I am able to participate in a check-in round prior to meetings. 2. I have the ability to understand an individual's experiences and thoughts and can empathize with his or her feelings. 3. I am able to use this skill of empathy to be aware of the feelings, thoughts and experiences of the whole project team. 4. I am aware and able to share the feelings, thoughts & experiences of my project team and can support them in addressing personal problems in the team. 5. I am able to establish a warm social context in the project team where each role feels comfortable, personal problems can be addressed and mutual respect for each other prevails and people feel encouraged to engage and share their ideas. 6. I am able to align these ideas with the values of SEKEM and enable the creation of a common identity in accordance with SEKEM's vision. 7. I am able to expand my skills of empathy in the project ecosystem and be known for my warm, social & supportive personality. 8. I am able to connect the project to the community on the ground and make sure it is well accepted by the community and embedded/grounded in its ecosystem. 9. I can establish a family feeling in the project ecosystem by building a warm social context where everyone receives mutual respect and is able to express their thoughts and feelings, feels heard and is able to share his/her feelings.
<p>Levels of conflict-management</p>	<p>As a person with the skill of conflict-management, I have repeatedly demonstrated that...</p> <ol style="list-style-type: none"> 1. I am able to detect conflicts on a conscious level in the project team. 2. I am able to distinguish between personal conflicts (root in personal relationships) and substantive conflicts (root in performance, tasks, actions, accountabilities) and know how to address them in the project team. 3. I am able to detect & address conflicts in the project team and support the process of solving them. 4. I can react to conflicts in the project ecosystem by addressing them with the respective parties & finding solutions so that the project process can continue. 5. I can handle conflicts in a way that the individuals involved learn from it and know how to solve the same type of conflict by themselves. 6. I can handle conflicts that a learning process in the whole project team emerges and conflicts are seen as a potential to increase collective learning for the future. 7. I have created an environment of healthy and participatory co-existence where roles/people learn from conflicts and where mutual respect, trust and support allow addressing every problem in the project ecosystem so that a joint solution or a compromise can be found.

4.1.2 The catalyst

<p>Core competencies (South)</p>	<ul style="list-style-type: none"> • Networking • Synergizer • Cultural awareness
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Levels for networking	<p>As a networker I have repeatedly demonstrated that ...</p> <ol style="list-style-type: none"> 1. I know the basic facts and figures of my project and can share my knowledge with others. 2. I have profound knowledge about the details of my project, can share my knowledge with both external and internal stakeholders and exchange information with other project teams. 3. I know the basic facts and figures from several projects at SEKEM, I am able to eloquently talk about my organisation and have profound knowledge about SEKEM and my projects and I can do small talk with external and internal stakeholders. 4. I am able to contextualize my projects and SEKEM as an organisation in the Egyptian society and see what impact my projects have, where projects are needed and how connections between projects, external stakeholders and international organisations could create better solutions. I am able to hold presentations in front of a larger group of people and represent the projects. 5. I understand the impact of my projects and SEKEM in the Egyptian society, I am able to communicate, share experiences in the area of my projects and connect with external and internal stakeholders in order to create new opportunities for future projects. 6. I know about political, economical and social developments in Egypt, the world, new trends in my project field. I can reflect about this knowledge and connect it to my projects, my work and SEKEM. I address people easily in order to discuss current topics that align my work and national/global developments. I can formulate concrete projects and identify concrete partners that are interested in developing new projects together and can evoke genuine interest for SEKEM in other people. 7. I am able to develop and maintain successfully over time a profound network including international organisations and potential donors for projects. I can interact with people from various backgrounds easily and have winning communication skills. From events I return with plenty of business cards and new lead opportunities for concrete projects. 8. I am able to manage long-lasting relations with stakeholders and business partners. Therefore, the network exists of a variety of people from different areas of business/society at hand, people that I can rely on and call whenever needed.
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Levels for synergizer	<p>As a synergizer I have repeatedly demonstrated that ...</p> <ol style="list-style-type: none"> 1. I know the basic facts and figures of my project and where needs and challenges are. 2. I have detailed knowledge about my and other projects, I am open towards new inputs and start thinking about synergies between projects and roles to spot improvement possibilities. 3. I am a reflective mind, critical thinker, able to question, challenge and have the capability to see well-settled approaches in a new light. With that I am open to new perspectives and paths of development and inspire new ways of thinking/new approaches. 4. I can look over the boundaries of my roles and projects, I can spot opportunities to combine the competencies of roles & people in my project and others in order to achieve a better outcome. I am able to question the existing plan and communicate my ideas for synergies with the integrator role. 5. I have the ability to reflect about the projects currently running at SEKEM, I have an overview over past projects and envision how the different projects and roles could be combined in order to achieve better outcomes. I am able to suggest changes in current project design to increase synergies and benefits without causing complications with donor regulations. 6. I am aware how to reach the aim of synergies between roles & projects and approach the project ecosystem by creating cooperative interactions, such as brainstorming sessions or synergy workshops, between the roles and other projects in a holistic manner. 7. I am well known in my project ecosystem as someone that has a very good overview over the roles & projects at SEKEM and knows how to combine them in a way that everyone profits from the collaboration. Furthermore, I can contribute to formulate strategic project and research goals for future maximization of synergies and benefits.
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<p>Levels for cultural awareness</p>	<p>As a person with cultural awareness, I have repeatedly shown that...</p> <ol style="list-style-type: none"> 1. I know about local customs, traditions and cultural issues in Egypt. 2. I know about local customs, traditions and cultural issues in Egypt and the specific local context, have a deep understanding of it and how they affect my project. 3. I have a deep understanding of them, can reflect about traditions and cultural issues and so develop an interest to increase my knowledge about cultural issues in Egypt and at SEKEM. 4. I know how these cultural inputs can inspire the project while generating spiritual meaning and connectedness to the project team/ecosystem. 5. I am aware of project challenges and potentials that may develop from cultural customs and traditions in advance so that all stakeholders can personally relate to the project. 6. I can create creative solutions how to solve the challenges and how to access the potentials within the project team while fostering the ability to deeply connect (also on the spiritual level) and inspire stakeholders of the project. 7. I am aware of cultural differences and value systems and know about their bright and shadow sides. I have basic knowledge about spiral dynamics and can actively use the insights in the project and help others to make use of insights and implications. 8. I am an expert on spiral dynamics and furthermore understand the Integral Four Worlds Model from Lessem and Schieffer and can translate this knowledge in concrete project needs and activities to improve its outcome.
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4.1.3 The specialist

<p>Core Competencies (South)</p>	<ul style="list-style-type: none"> • Knowledge creating • Knowledge sharing • Scholar/intellectual
<p>Levels for knowledge creation</p>	<p>As a knowledge creator I have repeatedly demonstrated that...</p> <ol style="list-style-type: none"> 1. I am able to do relevant background research about the topic of my project. 2. I know how to access and use important data sources in order to collect data for the project topic. 3. I understand the current knowledge bases needed for the project and address specialists in project specific fields and obtain insights from them. 4. I am able to collate and review all collected data efficiently, and determine their necessity and importance for the project. 5. I am able to choose the best methods to analyse the collected data and draw conclusions from it in a way that it can immediately be used by the project team. 6. I am able to set up a research design into the project proposal and to update it if necessary. 7. I am able to instruct the project team in order to standardize the documentation and presentation formats required by each project role in the project process. 8. I am aware of different research-to-innovation methods according to Lessem and Schieffer’s Integral Research spectrum and can integrate fitting action research methods into the project. Further, I can convert data/information/knowledge gained during the project process in shared experiences in a way that at a different point in time the information is still accessible.

<p>Levels for knowl-edgesharer</p>	<p>As a knowledge sharer I have repeatedly demonstrated that...</p> <ol style="list-style-type: none"> 1. I am able to set up an information platform to share collected knowledge about the project such as Google Drive, Dropbox, Clouds, etc. 2. I am able to write project documents which communicates information and knowledge accurately and concisely. 3. I am able to share knowledge by using visualisations, charts, templates, reports, documentations, project logs and make the knowledge easily accessible for the project team/ecosystem. 4. I am able to assess the current status of the knowledge base of the project ecosystem and address the Catalyst to set up trainings/workshops for the project team/ecosystem. 5. I can instruct the project team to use the knowledge sharing tools in order to create a knowledge platform enriched by every role for the use for future projects and I can create incentivisation mechanisms for knowledge sharing. 6. I am able to create a learning process for the project team and ecosystem by filling knowledge gaps by trainings and capacity building with specialists. 7. I am able to create tools to enhance learning processes in the future by setting up, maintain and supervise knowledge platform design for wider ecosystem.
<p>Levels for scholar/intellectual</p>	<p>As a scholar/ intellectual I have repeatedly demonstrated that...</p> <ol style="list-style-type: none"> 1. I have profound knowledge in the areas that I worked in or studied. 2. I developed my own learning style in order to access new knowledge fields. 3. I am a passionate reader, academic writer and know how to apply theoretical knowledge into practice. 4. I can share my specialist knowledge in the course of trainings and workshop with other roles and the project ecosystem. 5. I am able to to access other knowledge fields by using theoretical concepts and my ability to learn/study and connect other knowledge fields to my specialist area. 6. I can instruct the other roles to determine their ideal learning methods and so develop their own learning style. 7. I am able to teach other roles to connect their knowledge with other knowledge fields.

4.1.4 The implementor

<p>Core competencies (South)</p>	<ul style="list-style-type: none"> • Doer • GTD Practitioner • Orchestrating
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Levels for doer	<p>As a doer, I have repeatedly demonstrated, that ...</p> <ol style="list-style-type: none"> 1. I have the ability of putting things into effect, to manage the resources allocated to me and keep up with set timelines. 2. I am a structured, organized, and time oriented person with the ability to assess status quo of my work critically. 3. I have experience in implementing projects but I still need some guidance to prioritize tasks. I have an overview over open project tasks and sub-projects and I can follow up with project members to remind them. Still, project tasks and sub-projects are often delayed. 4. I can plan, organize, communicate and control, that is managing the project as a whole independently. I am able to manage resources and deadlines for the whole project. If I follow up a task this means that a task gets done with almost no delay. In case of delay I know how to activate formal hierarchies to speed up implementation and resource allocation. 5. I can reflect about the implementation of the project during the implementation process and adjust the plan, organization, communication, allocated resources thereby management of the project. 6. I am able to handle crises and react to challenges, even under stress and brief the project team/ecosystem for next actions to take. I never miss a deadline without a good reason and I am able to bring others to make extra-hours to finish something on time. 7. I manage my and the project's tasks with good example, the project team and ecosystem have confidence in my implementing skills and can adjust my implementing style to roles and situations.
Levels for GDT practitioner	<p>I have repeatedly demonstrated that...</p> <ol style="list-style-type: none"> 1. I can use some form of basic organizational system/approach that's better than holding everything in my head. 2. I can use a stripped-down set of Getting Things Done (GTD) and other organisational system practices, and demonstrate some of the key benefits this practice. 3. I can use the fundamentals of GTD practice with good consistency, and I look and feel like an experienced GTD practitioner. 4. I can stay organized, present, and "in control", without unconsciously dropping stuff, even while juggling lots of projects and inbounds. 5. I can effectively teach and coach GTD practices from deep experience as a master practitioner; my colleagues deeply trust my trusted system.

Levels for orchestrator	<p>As an orchestrator, I have repeatedly demonstrated, that ...</p> <ol style="list-style-type: none"> 1. I can drive a project to completion, while deftly removing any stuck points I hit along the way with support of my project team. 2. I can take a need, come up with a clear envisioned end result, and effortlessly break it down into a series of efficient actionable steps to get there. 3. I can stay focused on the most important & worthwhile aspects while driving my projects forward 4. I can own a project so much that my team and project ecosystem relax with high trust that it's in the right hands for an effective outcome. 5. I can stay laser focused on achievable results, without unconscious scope creep, getting lost in an unrealistic vision, or distracted by possibilities; my team benefits and my stakeholders love me 6. I can mobilize others to get the benefits of the preceding capacities on a team, even when the need is fuzzy, the project complex, and others aren't naturally as focused 7. I can take even the fuzziest sense of need, figure out the right vision for maximum leverage with all things considered, and make it all happen end-to-end, even when dependent on others
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4.1.5 The integrator

Core competencies (South)	<ul style="list-style-type: none"> • Knowledge about total IPM approach • Priority setting process • Situational leadership
Levels for Knowledge about total IPM approach	<p>As a person with the core competency of knowledge about total IPM approach I have repeatedly demonstrated that ...</p> <ol style="list-style-type: none"> 1. I have profound knowledge and understanding about the total IPM approach. 2. I have worked on a project that used the method of IPM approach. 3. I developed my knowledge about the IPM approach to a point that I can support the implementation on any project. 4. I am able to teach and instruct other roles about the IPM approach to use it for implementation. 5. I am able to revise the IPM approach during its implementation and formulate new ideas for improvement. 6. I can develop and adjust the IPM approach further in order to adjust it to any context of the project and transfer the concept to other areas beyond research and development.

Levels for priority setting process	<p>As a person with the core competency of priority setting process I have repeatedly demonstrated that...</p> <ol style="list-style-type: none"> 1. I am able to set priorities for my role/ roles and list them in yearly as well as quarterly OKR sheets and I am able to inform other roles & people about my achievements. 2. I am able to assess a situation and adjust priorities accordingly, still not deviating significantly from the original OKRs and I am able to say “no” to other people’s requests if needed. 3. I am able to support other roles in their priority setting process and make this visible in individual OKR sheets and align them with the goals of the whole team/ circle, thereby support the integration of their individuality in the project. 4. I am able to monitor, review and evaluate the whole project process and set priorities for the project that are reflected in project OKRs. I am able to map the project’s contribution in the contribution matrix. 5. I am able to improve the smooth processing of the project by changing priorities if needed and review the advancement of the project constantly. I can create an alignment of individual and team/project OKRs. 6. I have a complete overview over the objectives & process project, know exactly what each role is accountable for, which priorities need to be addressed and flexibly adjust them to new situations. I can help project members to set priorities to achieve their OKRs more effectively. 7. I mastered the priority setting-skill by creating an atmosphere in the project team in which every role can bring in its individuality and is able to achieve its tasks.
Levels for situational leadership	<p>As a person with the core competency of situational leadership, I have repeatedly demonstrated that ...</p> <ol style="list-style-type: none"> 1. I am an organized, structured and self-confident person that is capable of doing good work and knows his/her talents, skills and good work habits. 2. I am a humble person who is able to transfer my personal skills on a team level, can contribute to the team work in my role and has a good connection to all the roles in the team. 3. I am able to ensure that the project team meets the set goals and objectives and that the purpose of the project is met. 4. I am able to critically assess the project process, any present and future challenges and adapt to difficult situations by coming up with creative ideas developed in the team to overcome challenges. 5. I am a competent manager, I can organize people and resources to an effective and efficient pursuit of the project outcome. I can adapt my leadership style according to people’s value systems, situations and cultural backgrounds. 6. I am an effective leader which means that I set high performance standards for the project team, able to motivate the team to achieve the goals, lead the roles in the process of achieving them and integrate their individuality in the project. 7. I am interested in leadership and management literature, I know about Spiral Dynamics and other Individual/organisational/societal development literature and include it in my leadership style. 8. I am able to include the project ecosystem in a way that the overall project goal is reached more effectively and more efficiently. I ensure that everyone is constantly aware of the overall goal of the project team and ecosystem.

4.2 References for tools for each role

4.2.1 The animator

Problem and situational analysis	See template in google folder https://docs.google.com/document/d/13u24CoV-EnPCTXYbagEFwaof_QIfgcc3NeZBFCbfrOtE/edit
Participatory methodologies and management	See “Tools for Development” in google folder https://drive.google.com/drive/u/0/folders/0B_ucr4cCWidGULQ5S01haUxLYmc
Teamworking	See “Tools for Development” in google folder https://drive.google.com/drive/u/0/folders/0B_ucr4cCWidGULQ5S01haUxLYmc
Conflict reduction	See “Tools for Development” in google folder https://drive.google.com/drive/u/0/folders/0B_ucr4cCWidGULQ5S01haUxLYmc
Conflict-management	See https://www.mindtools.com/pages/article/newLDR_81.htm
Building partnerships	See “Tools for Development” in google folder https://drive.google.com/drive/u/0/folders/0B_ucr4cCWidGULQ5S01haUxLYmc
Theory U	Otto Scharmer (2007). Theory U: Leading from the Future as it Emerges. Executive Summary: http://www.ottoscharmer.com/publications/executive-summaries
Levels of Listening	See http://www.doncrawley.com/the-five-levels-of-listening-how-to-be-a-better-listener/
World cafe technique	See http://www.centerforappreciativeinquiry.net/more-on-ai/the-generic-processes-of-appreciative-inquiry/
Template community feedback	see template in google folder https://docs.google.com/document/d/1kEwYis-V7CYw0GnefdKpgr2eozl5wTQa7Q2RMvb_DZts/edit

4.2.2 The catalyst

Stakeholder analysis	see template in google folder https://docs.google.com/document/d/1rR8DVH-koffKJzfKWsc0_1V8frRfrp0OFTDppldTbdRQ/edit
Checklists events	See http://www.wildapricot.com/articles/eg-event-checklist

Problem and situational analysis	see template in google folder https://docs.google.com/document/d/13u24CoV-EnPCTXYbagEFwaof_Qlfgcc3NeZBFCbfrOtE/edit
Visioning	See “Tools for Development” in google folder https://drive.google.com/drive/u/0/folders/0B_ucr4cCWidGULQ5S01haUxLYmc
Brainstorming techniques	see template in google folder https://docs.google.com/document/d/1D0KDt_YU4THgua9TgD9uOGKzXwhvTxNvHroYOsOSetw/edit
Building partnerships	See “Tools for Development” in google folder https://drive.google.com/drive/u/0/folders/0B_ucr4cCWidGULQ5S01haUxLYmc
Spiral dynamics	Beck, D. E./Cowan, C. (2007). Spiral Dynamics. Leadership, Werte und Wandel. Eine Landkarte für Business und Gesellschaft im 21. Jahrhundert. Bielefeld: J. Kamphausen Verlag & Distribution GmbH. Or http://spiraldynamics.org/

4.2.3 The specialist

Problem and situational analysis	see template in google folder https://docs.google.com/document/d/13u24CoV-EnPCTXYbagEFwaof_Qlfgcc3NeZBFCbfrOtE/edit
Knowledge databases	-
Content management system (e.g. Google Drive)	A content management system (CMS) is a software application or set of related programs that are used to create and manage digital content.
Project management platform (e.g. wirke)	See https://www.wrike.com/wa/
Logical framework matrix	See template in google folder https://docs.google.com/document/d/1CHIYQ6P-POnziD-xaEM2TZ0PmWISzJqFINt7HsZ8E2gc/edit
All methods and research paths from integral research	Lessem, R./Schieffer, A. (2010). Integral research and innovation: transforming enterprise and society. Surrey: Gower Publishing, Ltd.
Specialised knowledge in the respective field	-
Scientific research methods	-
Word, Excel, Powerpoint, etc.	See homepage for tutorials http://www.gcflernfree.org/topics/office/

4.2.4 The implementor

Problem and situational analysis	see template in google folder https://docs.google.com/document/d/13u24CoV-EnPCTXYbagEFwaof_QIfgcc3NeZBFCbfrOtE/edit
Natural Planning Approach (GTD) and trigger list	See template brainstorming session in google folder https://docs.google.com/document/d/1D0KDt_YU4THgua9TgD9uOGKzXwhvTxNvHroYOsoSetw/edit
Accounting and managing balance sheet	-
Logical framework matrix	See template in google folder https://docs.google.com/document/d/1CHiYQ6P-POnziD-xaEM2TZ0PmWISzJqFINt7HsZ8E2gc/edit
Risk management	See template in google folder https://docs.google.com/document/d/1OSFr3b-CeGqCglm_wy3k1l44Mi9m2vLHpch2X_UBgVeM/edit
Influencing and negotiating	See “Tools for Development” in google folder https://drive.google.com/drive/u/0/folders/0B_ucr4cCWIDGUiQ5S01haUxLYmc
GTD approach to gain control and perspective	See http://gettingthingsdone.com/
wrike	www.wrike.com

4.2.5 The integrator

Problem and situational analysis	see template in google folder https://docs.google.com/document/d/13u24CoV-EnPCTXYbagEFwaof_QIfgcc3NeZBFCbfrOtE/edit
Monitoring, reviewing, evaluating	See template in google folder https://docs.google.com/document/d/1MIwSXLyBaFJTnzEYHmT-FKu4acjCnvOQi2PhJybvP0_o/edit
IPM approach	See IPM Manual https://docs.google.com/document/d/1D_c3X8Hg3Kg4mCIQTKNPDeXTS2xSY-GeHTenxi_FHeMQ/edit#

OKRs	<p>See google slides</p> <p>https://docs.google.com/presentation/d/1Rb-Syg8VQXfx36lwBCMEps2BR_ccRRkYe2vH1ZFjLE-jo/edit#slide=id.p4</p> <p>Or</p> <p>watch video</p> <p>https://www.youtube.com/watch?v=mJB83EZ-tAjc</p>
Spiral dynamics	<p>Beck, D. E./Cowan, C. (2007). Spiral Dynamics. Leadership, Werte und Wandel. Eine Landkarte für Business und Gesellschaft im 21. Jahrhundert. Bielefeld: J. Kamphausen Verlag & Distribution GmbH.</p> <p>Or</p> <p>http://spiraldynamics.org/</p>
Integral Leadership theory	<p>Lessem, R. and Schieffer A. (2009). Transformation Management. Towards the Integral Enterprise. Farnham: Gower Publishing Limited.</p> <p>Or</p> <p>See http://integralleadershipmanifesto.com/manifesto/the-problem-with-leadership-theory/</p> <p>Or</p> <p>Jaques E./Clement, S. D (1991). Executive Leadership. A Practical Guide to Managing Complexity. Oxford: Cason and Co. Publishers.</p>
Integral theory	<p>See http://www.kenwilber.com/Writings/PDF/IntroductiontotheIntegralApproach_GENER-AL_2005_NN.pdf</p>
GTD	<p>See http://gettingthingsdone.com/</p>

4.3 Checklist project process

Action	Role	Tool/outcome	Status quo
First Round			
Grounding - Diagnosing			
Burning issue on organisational or societal level discovered	Project Team	Problem and Situational Analysis completed see Template Problem and Situational Analysis in Google folder.	
Current situation in relation to burning issue across political, economic, social, technological, legal and ecological (PESTLE) issues analysed and written down	Specialist	See PESTLE analysis: http://pestleanalysis.com/what-is-pestle-analysis/	
Local context analysed	Catalyst	Supporting questions: <ul style="list-style-type: none"> • What is the history of the place? • Which stakeholders are locally involved? • How are the ecological, economical, cultural and societal dimensions developed at this place? • What infrastructure is there? • Who is the responsible person on spot? • Were there any other projects conducted at the same place? • etc. 	
Background of burning issue researched	Specialist	Supporting questions: <ul style="list-style-type: none"> • What is the background of the burning issue? • Does it have a local, organisational, societal or global scope? • What are the links to the greater global burning issues? • etc. 	
Risk assessment completed (see template on Google Drive folder)	Implementor	Risk assessment completed see Template Risk Assessment in Google Drive folder.	
Grounding - Engaging			
Project team addressed and set up	Integrator	<ul style="list-style-type: none"> • IPM role questionnaire completed by each person that potentially could fill a role and their managers. • IPM role questionnaire outcome discussed with roles and managers • Roles for project team set. 	

Ecosystem (including local community) and network consulted, advised, engaged and empowered	Animator & Catalyst	<p>Aim: inform all relevant stakeholders related to the project, get their advice and consult them. Install feedback mechanism for local community to continuously include them in process.</p> <p>To do:</p> <ul style="list-style-type: none"> Set up meetings or information sessions to ensure that the all relevant stakeholders are informed about the project and able to give inputs. Complete local community feedback from Google Drive folder (animator) 	
Stakeholder analysis	Catalyst	Stakeholder analysis completed see template Stakeholder Analysis in Google folder.	
Grounding - Early navigating			
Knowledge sharing platform set up and managed for project	Implementor	Create a Google Drive folder for the project according to IPM guideline and share it with the team	
Install project management platform or infrastructure to navigate the project from the beginning	Implementor	E.g. use wrike to set up infrastructure for project management (IPM suggests a generic guideline for the use of wrike)	
Emerging			
The project to culture & spirituality connected (Dig in the cultural and spiritual background of the organisation and the people involved in order to look for potential solutions/objectives of the project)	Catalyst	<p>Supporting questions:</p> <ul style="list-style-type: none"> Is there a tradition or custom that might support the project? Is there a tradition or a custom at SEKEM that might support the project? Is there a custom/tradition that might hinder the project? Is there a spiritual issue that might enrich the project? Is there a spiritual issue that might hinder the project? Are there societal relational ties that might enrich the project? Are there societal relational ties that might hinder the project? etc. 	
Objectives of the project set	Project Team (integrator is responsible)	<ul style="list-style-type: none"> Discuss overall goals of project in Sprint Meeting Fill in the "Objectives" in the logical framework matrix (see template Google Drive) 	

Goals of the project with overall vision of SEKEM aligned	Catalyst	Supporting questions: <ul style="list-style-type: none"> • Past projects similar to yours? • What is the story of the central topic of your project in SEKEM? • How does the project contribute to the mission to develop the individual, society and environment through a holistic concept integrating ecological, economic, cultural and societal life? • etc. 	
Brainstorm with the project team about the project process to achieve objectives completed	Team (implementor responsible)	Some supporting questions: <ul style="list-style-type: none"> • What are the things that occur to me about this project (problematic issues, positive developments, etc.)? • What is the current reality? What do I know? What do I don't know? • What ought I consider? What haven't I considered? • What needs to happen that the whole thing happen? • What are the activities/WP in the different stages? • What is the timeline? • etc. 	
Imagined project contribution completed (map project with IPM impact matrix)	Implementor	IPM impact matrix completed (ask IPM support to send you the questionnaire).	
Potential synergies assessed	Catalyst	Supporting questions: <ul style="list-style-type: none"> • What other projects run at the moment that may align well with your project? • Are there events/workshops that can be conducted with other projects? • Is there another project/role to work together that the combined result is greater than the individual? • etc. 	
Governance, print and weekly circle meetings set up	Implementor		
Navigating			
Knowledge bases understood	Specialist	Supporting questions: <ul style="list-style-type: none"> • What is the basic knowledge that underlies your projects? 	
Data and knowledge needed for project collected	Specialist		

Workshops and trainings for project planned	Specialist	Supporting questions: <ul style="list-style-type: none"> • What is the workshop/training about? • Who conducts the workshop/training? • Who are the participants of the workshop/training? • When and where does the workshop/training take place? • What is the agenda of the workshop/training? • Financial feasibility of the workshop/training? • Are all the stakeholders informed about workshop/training? • etc. 	
Database created for project	Specialist	Supporting questions: <ul style="list-style-type: none"> • What data is needed? • How to collect the data? • How to organise collected data? • etc. 	
Plan and strategy, WP for implementation and logical framework set	Implementor	Logical framework matrix completed see template Google folder.	
Implementation prepared by creating templates, strategies, etc.	Project team	All created documents ready for use in Google Drive	
Effecting			
Project successfully implemented	Implementor & integrator		
Documentation of project process set up and made	Implementor	Next actions trackable on write.	
Finances managed	Implementor	Review project balance sheets.	
Project plan, strategy and logical framework matrix periodically revised	Implementor & integrator		
New priorities set if needed	Integrator	Evaluation completed and communicated to project team (see template Evaluation Support).	
On spot visits concluded	Animator		
Next Rounds			
Grounding			
Burning issue and status quo compared and assessed	Implementor	Supporting questions: <ul style="list-style-type: none"> • Did the focus of the project change over time? • Does the project still answers the same burning issue? 	

Continuous feedback from project ecosystem and local community gathered and included	Animator	Supporting questions: <ul style="list-style-type: none"> What is your impression of the project advancement? What do you like about the project? What do you not like about the project? To do: <ul style="list-style-type: none"> Use template local community feedback in Google Drive folder 	
Keep up good communication and collaboration in project team and ecosystem for smooth process	Animator	Examples for questions: <ul style="list-style-type: none"> What is your impression of the communication in the project What has to be improved to have a smooth communication? Are you informed well about the project? etc. 	
Conflicts in team and ecosystem managed and learning process installed	Animator	If conflicts appear see template managing team conflicts in Google folder.	
Emerging			
Objectives with status quo compared and process adapted if needed	Integrator	Evaluation completed and communicated to project team see template Evaluation Support in Google folder.	
New priorities set according to developments in projects	Integrator	Priorities are adjusted according to evaluation from previous action.	
Connections with networks, projects and people are nourished and managed	Catalyst		
Project represented in conferences, meetings etc.	Catalyst		
Synergies realised	Catalyst		
Navigating			
Continuous research and data collection - knowledge creating and sharing	Specialist		
Knowledge sharing platform (Google Drive) and wiki managed and updated	Specialist and implementor		
Trainings and workshops conducted	Specialist		
Effecting			

Project advancement is continuously monitored	Implementor	Make frequent evaluations of the process by using the template evaluation support in Google folder.	
Resources are accordingly allocated managed	Implementor		
Weekly Circle meetings set	Implementor		
Monthly sprint meetings set	Implementor		
Governance meetings set	Implementor		
Last Round			
1. Each role is responsible for the particular phase and reflection about it in the last round			
2. Closing meeting in which all the points are discussed with the whole project team			
Grounding			
Feedback of local community about project contribution and reflection about impact on local community	Animator	Conduct final final local community feedback see template in Google folder.	
Communication of project team and ecosystem reflected	Animator		
Long-run support system for project contribution created	Animator		
Recurrent conflicts in project team and ecosystem discussed	Animator		
Changes for the community and the environment due to the project reflected	Animator		
Emerging			
Emerging phase and achieved contributions reflected and new insights discussed	Catalyst		
Contribution of project mapped by the IPM impact Matrix and compared to imagined project contribution	Team under lead of implementor		
Navigating			
Research report written	Specialist		
Reflection about Navigation phase, specifically about the knowledge creation and sharing during the project and about installed structures and concept to support it	Specialist		
Effecting			
IPM Manual adjusted for future project	Integrator		

Report for donors and in house reporting witten	Implementor		
Reflect about Effecting phase and financials with the respective stakeholders	Implementor		
End of project celebrated	Project team		

5. Final remarks about the co-creation between SEKEM and Trans4m

This Manual developed through a co-creation between SEKEM and Trans4m. The main author of this Manual is Annina Hunziker that conducted a Trans4m Junior Fellowship at SEKEM for 6 months. The following paragraphs introduce the main author and the Trans4m organisation as partners of this co-created IPM Manual.

The main author is Annina Hunziker and she is a 25 year old Swiss student that conducted a Trans4m Junior Fellowship at SEKEM for 6 months. Her major is international affairs and she studies at the University of St. Gallen in Switzerland. The aim of this Trans4m Junior Fellowship and research process was to develop an approach as an integral solution for the perceived imbalances by the PMs in the HUSIL. This newly co-created IPM approach does not only led to this particular Manual but is processed and reflected in her bachelor thesis. Through the research process, Maximilian Abouleish-Boes and Trans4m were the main co-researchers and co-developers.

Trans4m is an organisation founded by Alexander Schieffer and Ronnie Lessem. They passionately enable collective and individual transformation processes by catalysing the engagement with their new integral theory. Trans4m addresses the burning issues of our time in close cooperation with Fellows, Integral Centers and Partner Organisations all over the world.

“Trans4m sees itself as an integral response to a “world on fire” - a world that is facing massive socio-ecological-economic-spiritual imbalances that altogether threaten the very existence of people and planet.” (Trans4m, 2016).

The Trans4m Junior Fellowship is one way of catalysing their new integral theory by aligning young student's personal calls with an organisational call to make a collective contribution to address a concrete challenge in the partner organisation. Annina Hunziker is the fourth Junior Trans4m Fellow that worked with SEKEM on an integral solution. Since 2006, Trans4m and SEKEM work in close cooperation by co-creating a role model for an Integral Enterprise and Integral Economy, and to foster the understanding of the underlying processes of social and societal innovation. Trans4m has extensively reflected and written about SEKEM's nature published in their books Transformation Management (2009), Integral Economics (2010) and Integral Development (2014).