



A practical guide  
for the Great Transition

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– Michael Narberhaus, October 2015 –

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The Smart CSOs Lab is a space where activists and change agents from civil society come together as a community of practice to learn how to make change in the way civil society thinks, acts and operates. The ultimate aim is to give large-scale impulses for an activism that works effectively towards systemic change. Check here for more information: [www.smart-csos.org](http://www.smart-csos.org)

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# Introduction

Most activists and social change leaders today would argue that a sustainable future will only be possible by making profound changes to our lives and our political and economic systems. Yet in many campaigns and strategies this is not reflected. Not few would agree that neo-liberal capitalism is at the root of many ecological and social problems. But for many activists terms like system change, Great Transition, paradigm shift are too big, too utopian or too abstract and very difficult to be broken down into tangible strategies and steps. If it is already so difficult to achieve our small little steps – and often we don't achieve them – what sense does it make to work towards utopia?

The idea of changing our economic system and the underlying culture that supports it can seem like an impossible task. But the current system was not given by the laws of nature. Instead it was created and continues to be shaped by human beings. And as such we as human beings can change it again. In fact, only if we take on this task collectively, will we have a chance to create a fairer and much more equal society where current and future generations thrive in harmony with nature.

*We live in capitalism. Its power seems inescapable. So did the divine right of kings. Any human power can be resisted and changed by human beings.*

– Ursula Le Guin –

The purpose of this handbook is to help bring the dream of the Great Transition to life. Based on the research collated and the ideas and experiences generated by the Smart CSOs Lab, we provide guidance and support to activists who want to make a meaningful contribution to this deeper change.

It was written for grassroots activists and social change leaders working on diverse issues such as climate change, poverty, equality, health, human migrations and gender equality. It is for anyone committed to building or others who are already involved in the world of building and

advocating alternative models of society and economy. They all work towards a just and ecologically sustainable world and are keen to learn how to create more effective strategies for deep systemic change.

Re.imagining Activism provides practical advice and questions to ask ourselves when we want to change organisations, campaigns or become active on system change in another way. What obstacles do we need to overcome and how can we achieve this? Inside, you will find examples and case studies of other activists who have interesting experiences to share.

A small caveat: This is not a recipe book for changing the world. There are no easy answers. The work of systemic change requires experimentation and jumping into deep waters. But we can learn from others about how best to jump. The Great Transition is a leap into a new world. Without a bold vision we will never change the world. What might seem impossible today can become reality tomorrow.

The contexts in which our readers are active differ in some cases widely. We take this into consideration and address different circumstances to allow a wide range of activists to become involved in the Great Transition. In spite of the important differences especially between professional change agents and voluntary activism, the common challenges outweigh the differences and it is fundamental to overcome existing divides for the Great Transition to succeed.

# Why does activism need re.imagination?

Are you an activist engaged in solving global issues like climate change, poverty or human rights? Do you believe that many of the ways today's activism and civil society organisations are trying to address these problems are ineffective? Here we explore some of the reasons why this could be the case ...

## **Systemic global crises**

Most indicators measuring the health of the planet show a negative trend: Climate change, biodiversity loss, acidification of the oceans and shrinking freshwater resources are all serious threats to life on earth. Global inequality has been on the rise for decades.

These crises are increasingly intertwined. Issues such as economic development, climate, finance, biodiversity, security and migration have become highly interdependent and mutually reinforcing, and cannot be adequately addressed with a focus on single issue solutions. These systemic global crises require a deep rethinking of our economic, political and social systems.

Unfortunately, most activism is not yet promoting such deeper systemic shifts, nor is it embracing the complexity of systemic change in its strategies.

Here we analyse a number of core reasons why civil society organisations and grassroots activist networks are not utilising their full potential in tackling the deeper systemic issues:

## Being too pragmatic

Focusing on the short-term impacts of our work is important and necessary to avoid harm to people and the environment. The urgency is real: the climate is warming, people are suffering and species are being lost. Much of what civil society organisations do is the pragmatic and important work of helping the poor, the marginalised and the environment in real time. But we need to acknowledge that fixing symptoms is not the same as dealing with underlying causes.

***There are a thousand hacking  
at the branches of evil to one  
who is striking at the root.***

– Henry David Thoreau, 1854 –

Almost by definition campaigns have to be pragmatic. Campaigners have to set measurable short-to-medium term goals to engage audiences and remain credible with their funders. But campaigns are problematic



when focused exclusively on quick fixes: they don't deal with root causes and can create the illusion that they will solve the problems when they actually don't.

Most campaigns that promote a shift in technology (see example) or aim to raise funds for aid in the fight against poverty share this problem. Making the production systems/global supply chains of consumer products more energy and resource efficient and less toxic is important, but with current growth rates of consumer products the overall impact of these measures is *playing catch up* in a game that we won't win.

Aid transfers and technical support aimed at fighting poverty and coping with emergency situations can be vital to alleviate suffering, but they don't tackle the root causes of poverty and can create dependency on aid. In addition, development cooperation aimed at economic development is often reproducing production and consumption patterns of the global north that are incompatible with the existence of planetary boundaries.

As long as we don't put enough effort into mobilising people towards deeper system change, not only will we fail to solve our problems, we might perpetuate them. Too much pragmatism and focusing too much on tactics can reinforce the unsustainable status quo.



**How do you define success in your work?**

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**Are you setting the right objectives?**

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**Are the objectives of your change strategies designed to contribute to effective long-term change?**



## Winning the campaign but losing the planet?

In 2013 Greenpeace won again. With another of its famous campaigns, Greenpeace achieved a commitment from German car manufacturer Volkswagen to stop lobbying against stricter European regulation on car fuel-efficiency and to make its own cars more fuel-efficient. On the organisation's own terms the campaign was clearly a success: it was powerfully creative (with Star Wars' Darth Vader as the main character), it mobilised over half a million people and it achieved a clearly defined short-term campaign goal. Greenpeace celebrated: "[This] is big, because using less oil means less pollution, less impact on the climate and less pressure on ... the Arctic."

No doubt, fighting nasty corporate lobbyism and advancing vehicle fuel efficiency are good things. However, the messages Greenpeace sends with this type of campaign might be counterproductive in the long run because it underestimates the power of narrative. Presenting fuel-efficient cars as a major step towards saving the climate is dishonest because in the current context, more fuel efficiency might actually increase car usage (rebound effect) and without a major change in mobility patterns (trends towards SUVs and a projected increase from 1 to 2 billion cars globally in the next decade) the campaign will have won another battle while we are losing the planet.

Without putting the campaign into the wider context of what needs to be done and start taking people on a journey with a narrative of deeper change, such campaigns can reinforce the unsustainable paradigm rather than helping to change it.

People working within Greenpeace's network are increasingly aware of the shortcomings of these campaigns. Discussions about how to create more systemic campaigns and how to integrate the problem of economic growth into the organisation's work are starting to happen.

## **Playing the game of politics and business**

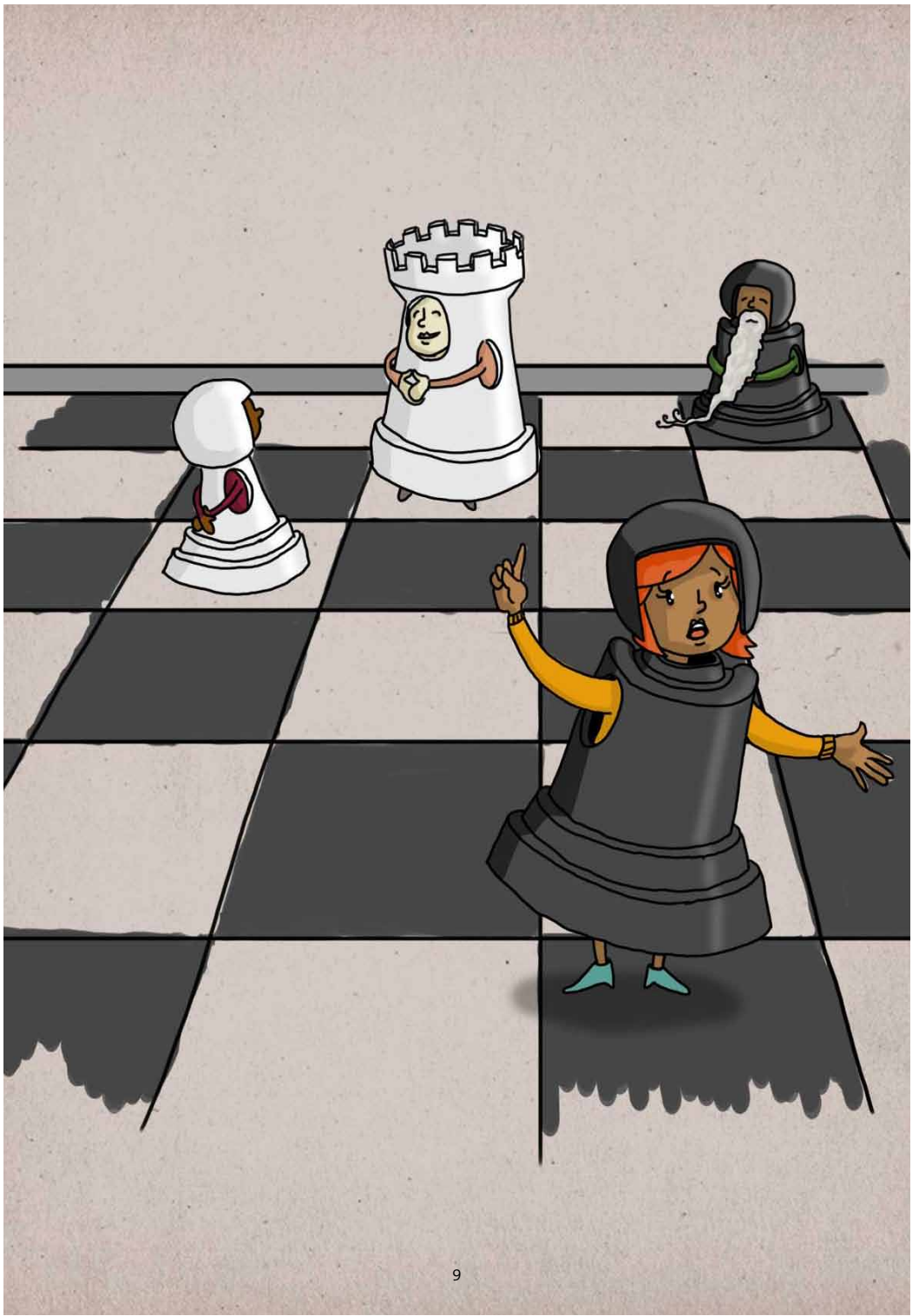
Governments and large corporations are the most powerful institutions in our society today. Over the past decades as civil society organisations became increasingly professionalised, they believed that the most effective way to influence power was to build up their policy expertise and become credible and respected stakeholders for government and business. CSOs regularly participate in consultations and policy processes at the national and international level (like the UNFCCC and SDG) and many have created partnerships with large corporations. As a result, civil society organisations have had considerable influence on policy decisions, especially when they have skilfully combined effective mobilisation of the public with their advocacy efforts.

However, somewhere along the way many CSOs have lost their radical touch and have been increasingly instrumentalised by governments and business. Possibly as a result of getting involved in day-to-day politics, they drifted into tactics and lost sight of the strategic perspective. While this might be a price worth paying for the sake of making the system more bearable in the short-term, it is clearly problematic from a system change perspective. Today's political and economic institutions are driven by a complex web of vested interests that make them highly resistant to any fundamental change. Mainstream advocacy is at its best contributing to incremental change and its worst strengthening the current system.

Later in this guide we will talk about the alternatives ...



**To what extent do you believe that your advocacy work is contributing to long-term systemic change?**



## As there's no better alternative, let's join the Action/2015 campaign

The [Action/2015 campaign](#) is a global campaign calling “to end poverty, to meet fundamental rights, tackle inequality and discrimination as well as achieve a transition to 100% renewable energy.” As of July 2015, 1,600 organisations had signed up. The campaign aim is to achieve *ambitious* outcomes at the September 2015 global agreements on the Sustainable Development Goals as well as at the December meeting in Paris focused on a global agreement to tackle climate change (COP21).

Action/2015 mimics the shallow narrative of the official UN SDG texts and doesn't make any reference to the deeper root causes of poverty and climate change let alone the deeper structural changes to tackle these. It clearly lacks the ambition for any deeper systemic change and is playing the same game that civil society has been playing so often at these processes: At its best it makes constructive proposals that improved the outcomes to some extent but without being capable or even aiming to tackle the deep institutional lock-ins of these processes that result from the national vested interests that governments mostly defend.

While many organisations involved in the Action/2015 campaign might not bother too much about these shortcomings, some organisations that do believe in the need for a deeper shift are signing up to this campaign as they cannot see alternative ways of engagement to following the official institutional agendas. More reasons that we have to build these alternative ways to get real on systemic change ...

## Trying to solve problems issue by issue

Activism has a long and arguably successful history of focusing on particular problems. Indeed, many fights have been won by focusing on single issues – the history of human rights struggles as well as that of the environmental movement is full of these wins. And even today, a case can be made for focusing on single issues, for example the gay rights movement has had tremendous successes in recent years.

But given the systemic and complex nature of today's problems, issue-by-issue responses are often inadequate. One consequence of focusing on single issues is that we tend to fix symptoms rather than tackle root causes. Another is that we focus on developing great expertise on issues rather than deepening our understanding of the systemic connections between issues.

*There is no such thing as a single-issue struggle, because we do not live single-issue lives.*

– Audre Lorde –

It is often directly the institutional donors or the organisational fundraising departments pushing to focus on narrow short-term issue oriented outputs rather than engaging with the complex long-term big picture.



**To what extent are you focusing on problems and single issues rather than tackling root causes?**

**What role are your donors and fundraisers playing in this?**

## Suffering from the eleventh hour syndrome

Understandably, many activists feel a powerful sense of urgency around their work. Sensing the approaching apocalypse, we work more and faster to avoid disaster. After all, it is our responsibility to save the world before it is too late. This is the eleventh hour syndrome.

We have to raise more funds, create more meetings, travel to more conferences, write more reports, send more emails. Activists often find themselves racing against the clock but the work is never done. As a result, activists suffer disproportionately from stress and burnout.



With the justification of having to save the world, such activism can unknowingly reproduce the patterns of speed, efficiency and growth of the world we aim to change. Urgency is the reason given for not working at a root cause level – we often hear “there’s no time to transform values”. The eleventh hour syndrome also prevents activists from building reflection into their work. We are always racing to get things done instead of noticing patterns and adapting strategies our as we go.

Moreover, in the long run, attempting to motivate our audiences with messages of urgency and scenarios of threat doesn’t work – it becomes normality and the effect vanishes.

There are deeper psychological issues at play that we need to deal with. We need to become conscious about some of the personal motivations lying behind this syndrome. In chapter 6 we will dig into this ...



**To what extent does your activist work stresses you out?**

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**Are you driven by a sense of urgency?**

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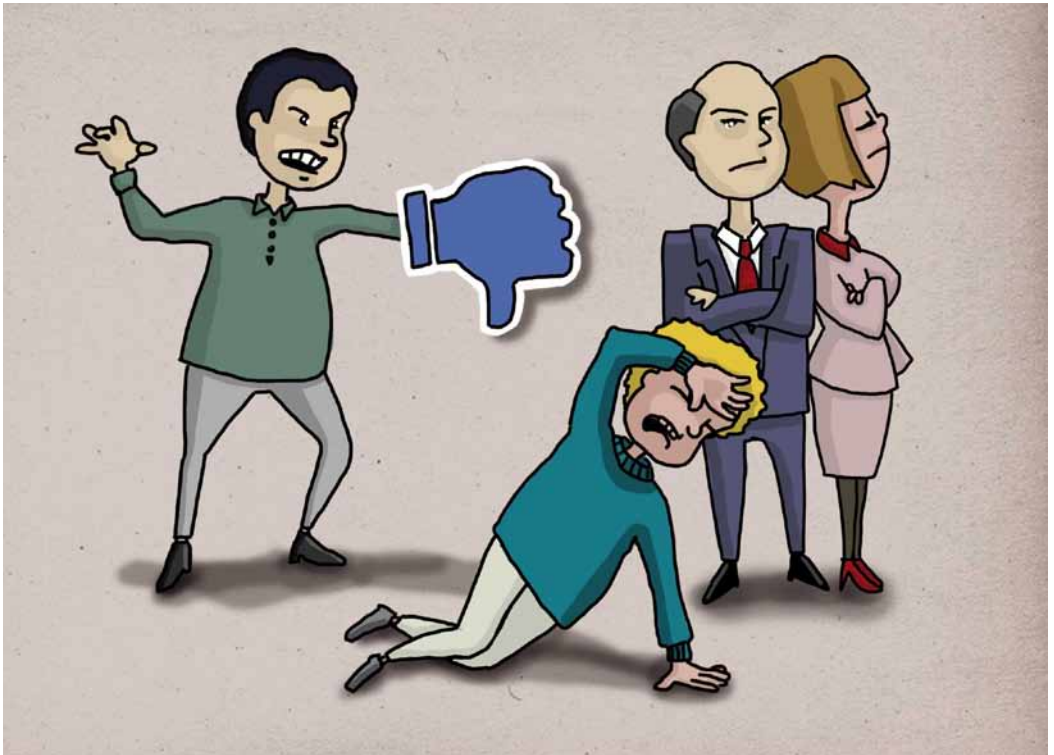
**How much time are you dedicating to reflection?**

## Fighting the enemy

The identity of most social movements is defined by the ideas of resistance and struggle against a ruling class, an oppressive government, a wealthy elite etc.

Activists are very fast and effective these days in identifying and fighting enemies. Be it the richest 1% responsible for global inequality, be it the British professor who made a sexist comment or be it Mrs Merkel who took over Greece with a coup d'état, the Twitter-storm is very fast in targeting the enemy.

Social media tend to have a reinforcing effect on the reduction of complexity and quick agreement about who is wrong and who is





right. In social media we are linked to communities that mainly think alike and in times of information overflow, we only read what re-confirms what we already think. Those who disagree often stay silent because they fear the backlash, the so-called *spiral of silence*.<sup>1</sup> We become a mob with uniform thinking.

We humans in general like to add a face to a problem. We prefer to think that if something bad happens it is someone's fault – and of course in doing so we are often right. Oppression is not a natural phenomenon. People in powerful positions (for example in government) have a responsibility for their actions.

However, the personification of the enemy goes along with a reduction of complexity. At its best, defining an enemy sharpens messaging and makes a campaign more effective and at its worst, it misunderstands the problem and fights the wrong enemy.

The systemic problems of our times are not the particular fault of one group or another. Instead, if there is one main enemy, it is the system. The systemic shift that is needed requires changes at many different levels. Whilst the abuse of power by certain privileged groups resisting systemic change is without doubt a key factor in the system, dividing the world between good and bad people doesn't take us very far. It is important that we learn that we all are part of the system and interact with it. We need to deal with complexity. In the coming chapters we will explore how ...



**To what extent do you define your strategy as a struggle against someone?**

## Reproducing problematic values

Most civil society organisations and activist networks try to win the rational argument (e.g. with coherent, scientifically sound analysis and policy proposals) or they try to win the political argument by creating smart memes and frames to influence day-to-day politics.

The question of how our organisations and networks impact cultural values and why this is important is still mostly a blind spot.

By putting our faith in the power of the rational argument we underestimate the importance of the subconscious mind in people's behaviour and decisions. At the same time we are often not aware that we do have an influence on cultural values, but often in a way that it doesn't help our causes. Nothing is free of values. In the way we communicate and with the messages we transmit we communicate values. With everything we do and how we behave as individuals and organisations, we embody a range of values. Unintentionally, we often reinforce the dominant extrinsic values and our current culture of self-interest and consumerism. This is problematic because research has shown that the more dominant materialistic values are, the more unhelpful a person's behaviour will be with regard to bigger-than-self problems, like climate change, inequality etc.<sup>2</sup>

In the coming chapters we will explore this trap and how a deeper understanding of cultural values and frames can make our campaigns and organisations more effective.



**What are the values underlying your current campaigns/work?**

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**To what extent are you aware of your potential impact on cultural values?**

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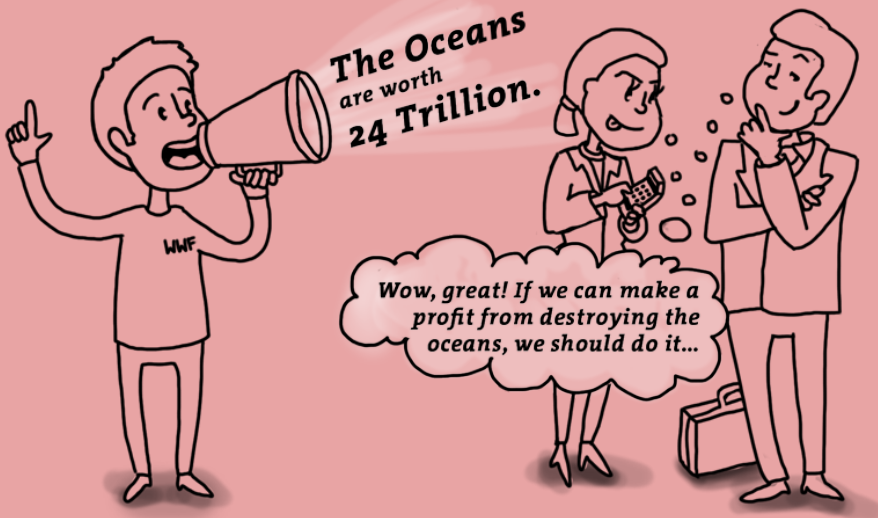
**To what extent do you believe that you are engaging helpful or unhelpful values?**

## Putting monetary value on nature will not save it

In 2015 WWF published its report *Reviving the ocean economy*. The report, co-written by the business consultancy Boston Consultancy Group, puts a monetary value of \$24 trillion on the oceans. The central argument for WWF's call for protecting the oceans through global agreements like the SDG and COP21 is an economic one, i.e. that oceans provide immense value for the global economy. The logic of this strategy is clear: WWF believes that speaking the economic language of decision makers is the most effective way to reach their goal.

If markets were the solution to ocean destruction, this might be a valid approach. But they aren't. The economic argument suggests that if we could make a profit out of destroying the oceans (say, \$48 trillion) we should do it. But oceans are an integral part of life on earth and cannot be separated out and valued like financial assets. They cannot be substituted once they are gone.<sup>3</sup>

WWF's strategy of framing the protection of nature in economic terms is very problematic because it reinforces the values and frames that are causing the problem in the first place.



## Why the Make Poverty History campaign failed

In 2005 the Make Poverty History campaign mobilised millions of people all over the world. Nearly a quarter of a million people marched in Edinburgh ahead of the G8 summit. The organisers of the historic protest were a coalition of 540 CSOs who formed the Make Poverty History UK campaign.

From a short-term perspective, the campaign was a huge success, partly due to its empowering de-centralised campaign strategy and the novel and efficient use of text messaging. Celebrity endorsements and a Live8 concert meant the campaign received high coverage by the media. As a result of the campaign, the percentage of the population who stated they were very concerned about extreme poverty increased to 32% from 25%.

However, in 2011 this index fell back to 24%, lower than before the campaign. Why did this happen?

The *Finding Frames* report from 2011 suggests that the campaign strengthened the values and frames of self-interest, free market and consumerism, which in turn don't create the long-term commitment to end poverty. The messages where tackling poverty is understood simply as making donations to charities proved too strong and the use of celebrities in the campaign led to the unintended promotion of extrinsic values with potential harmful effect on the public's deeper motivations to act on the issues the campaigners care about in the first place.<sup>4</sup>

## **Using money to keep the world as it is**

Funding schemes are one of the core reasons CSOs are pursuing narrowly focused symptoms oriented strategies. Over the last decade many grant makers, including private foundations and public funders, have further pushed their grantees to focus on clearer measurable goals, thereby suppressing innovative, more risky and systemic approaches.

The reasons for these funding strategies seem to fall into two categories:

First, many philanthropists who set up and control private foundations as well as governments who are ultimately responsible for public funding schemes have an active interest in preserving the status quo. These funding schemes are intentionally designed to avoid deeper system change and to preserve the value of the philanthropists' financial investments and wealth – their preferred instruments are aid to tackle poverty and technology to help the environment.

Second, other private funders don't face these issues of vested interests (or to a much smaller degree), but their organisations are often very conservative and too risk-averse to embark on innovative system change strategies. For these organisations a core contradiction persists: the wealth the foundation is built upon is the result of the very unequal system that it now pretends to change. Most funders have not yet tackled the problems that come along with the power of money. These organisations are very hierarchical and non-transparent. Their inability or reluctance to develop relationships of trust with their grantees makes it difficult to jointly create a common understanding about proper system change strategies and ways to evaluate them in a more appropriate way.

In chapter 7 we will explore how grant-making organisations can join the system change movement ...

## **Vested interests in philanthropy: the Gates Foundation**

Some of the world's biggest and best known NGOs came together in 2013 to see how they could gain more support for their work. On the face of it, it sounds reasonable. Don't we all want to work in more conducive atmospheres? But the devil's in the detail.

The Narrative Project was launched in 2014 by the Gates Foundation to its circle of international charities who work to fight poverty. It states that the main barrier to the sector's effectiveness was "the decline of public support for our work," meaning fewer and lower donations.

The project claims to use frame analysis yet does not identify nor question the frame upon which it itself is based: that aid to poor countries is the most effective way to fight poverty and all that the public need to do is give more money.

We might ask ourselves why the Gates Foundation wants to create a cohesive narrative on aid across the development sector. Why encourage others to keep seeking public support rather than question their own actions' effectiveness? At least a part of the answer seems to be present in Bill Gates' review of Thomas Piketty's *Capital in the Twenty-First Century*: he believes that the world is getting more equal, not less; that only excessive, family-gained wealth concentration is problematic; and that the biggest debate to be had is on the type of taxation we need. It seems to have been an admirable effort in non-systems thinking, a de-politicised separation of taxation and wealth from their part in a system, which ensures that the poor keep getting poorer.



**To what extent is your foundation (or your funder) asking your/ its grantees to pursue narrowly defined issue-focused work?**

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**How do you measure and evaluate success?**

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**To what extent do the funding schemes encourage innovative systemic strategies?**

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**How open and transparent is the funding organisation?**



If you would like to dig deeper into some critical analysis on mainstream activism, here are some great resources:

- **Gustave Speth:** *The Bridge at the Edge of the World* (2008)
- **Gustave Speth:** *Angels by the River* (2014)
- **Noami Klein:** *This Changes Everything* (2014)
- [Movement Strategy Centre: Out of the Spiritual Closet – Organizers Transforming the Practice of Social Justice](#) (2010)

In order to tackle the above issues we need to work at the personal, organisational and social change strategy levels. We will explore ways to address these issues in the coming chapters.

# Re.imagining our future

## 2.1 UNDERSTANDING THE SYSTEM

It's hard to deny – we are living in times of multiple global crises:

**ECOLOGICAL CRISIS:** Why are we consuming more resources than nature can renew? Why are carbon emissions rising and a climate catastrophe approaching? Why are we in the midst of the sixth mass-extinction of species?

**SOCIAL AND ECONOMIC CRISIS:** Why are our societies increasingly unequal with the richest 1% owning 50% of the global wealth? Why is social cohesion breaking down? Why is nationalism on the rise?

**SPIRITUAL CRISIS:** Why do we experience increasing stress and spiritual emptiness? Why are the illnesses of burnout and depression on the rise in many rich countries?

**DEMOCRACY CRISIS:** Why are so many people losing faith in politicians and the democratic process? Why is election turnout decreasing in so many countries? Why are nationalist and extreme right parties on the rise?

There are many answers to these questions but unlike other moments in human history, we increasingly understand that these crises do not stand alone and they are not localized. Instead they are global, systemically interlinked and they share the same root causes.

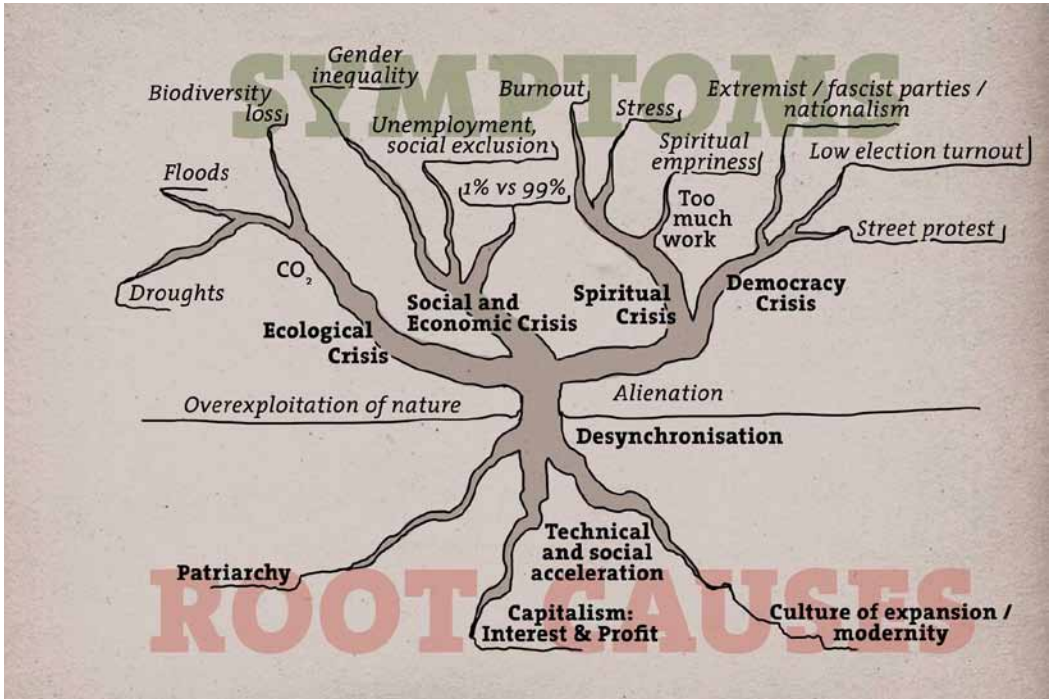
**ACCELERATION:** German sociologist Hartmut Rosa believes that the logic of social acceleration in modern societies lies at the root of these crises. The main argument here is that technological progress accelerates the production of goods, contacts and options for humans, but the time we have available for these doesn't change. Technological acceleration affects the digital sector in particular, but paradoxically, also goes hand



in hand with an acceleration of the pace of life. Even though the former was intended to create more available time for the individual, late modern society does not enjoy the luxury of more leisure time. On the contrary, we seem to suffer from a constant time shortage by trying to do more things in the same amount of time: we live faster, work faster and we consume faster.<sup>5</sup>

**DESYNCHRONISATION:** One perspective on these multiple crises is to see them as the consequence of a *desynchronisation* between different systems:

- The ecological crisis results from resources being used at an ever-faster pace for an ever-growing economy and nature that cannot keep up with this pace. The systems are out of synch.
- The spiritual crisis is the result of our minds not being able to keep up with the pace of modern life, a pace we cannot determine ourselves: digital globalisation and the fast paced consumer society lead to an alienation from space, from work and even from oneself. Burnout is a frequent consequence.
- The social and economic crisis is the result of an ever-faster capital accumulation of some and the impoverishment of others who can't keep up with the pace of production and wealth accumulation. The latter fall behind or leave the race altogether.
- The democracy crisis is the result of a political system and democratic decision-making processes that can't keep up with the accelerating global economy. Politics becomes reactive: we have to adapt to global markets to stay competitive. This type of politics no longer speaks to citizens. They get alienated from democracy and search for alternative anchors in extremist options that promise (false) stability and community or they become apathetic.



**ROOT CAUSES:** If acceleration is part of the underlying logic of our global social, economic and political systems, then what are the root causes and drivers of this acceleration?

Social acceleration is not only a phenomenon of capitalism, it happens in socialist economies to a lesser degree. However, the capitalist system's core element, capital accumulation (interest and profit) makes it especially growth obsessive. Capitalism in its current form cannot live without growth and the pace of technological innovation is accelerating further and further.

The logic of growth can also be found deeply embedded in our mental and cultural conditioning. We are living in a culture of *more* – for some of us it's more money, for others it's more traveling, more contacts, more experiences ...



**To what extent do people in your organisation, network or movement have a common understanding of the underlying root causes and system logic?**

*This is a fundamentally important step if we want to develop more effective strategies to tackle the issues we care about.*



If you would like to learn more about root causes of our multiple systemic crises, here are some resources:

- **Hartmut Rosa:** *Social Acceleration – A New Theory of Modernity* (2013)
- **Donella Meadows:** *Leverage Points – Places to Intervene in a System* (1999)



## What is systemic change?

By definition the term *systemic change* can refer to change in any system: the whole national school system, the global food system, the local waste system etc.

Systemic change is required when efforts to change one aspect of a system fail to fix the problem. The whole system needs to be transformed. Systemic change means that change has to be fundamental and affects how the whole system functions.

Systemic change can mean gradual institutional reforms, but those reforms must be based on and aimed at a transformation of the fundamental qualities and tenets of the system itself.<sup>6</sup>

When our objective is systemic change, we need to look at the whole system including all its components and the relationships between them.

Most systems are by nature dynamic and complex and systemic change cannot be planned. Instead systemic change requires innovation, experimentation as well as constant learning and adaptation.

There is not one agreed upon definition for systemic change: some refer more to the what of change (fundamental) and others to the how of change (involving all system actors, innovation, emergence) – it has to be both, but in addition it has to include a realistic consideration of power in the system and how to deal with it.

Setting the system boundaries is fundamental. Many system change projects and approaches are not tackling the real root causes because the wrong system boundaries are set. Many of today's crises (e.g. ecological, social) might be ameliorated if looked at in a sub-system (e.g. food), but in order to identify more effective leverage points we need to go deeper and beyond these system boundaries: ultimately today's major crises are global and deeply cultural (late modernity – see Hartmut Rosa among others). They are tied up with our economic, political and social systems in the broadest sense.

## 2.2 THE GREAT TRANSITION – A VISION TO TACKLE MULTIPLE CRISES

In our times two problematic dogmas persist:

- *The mechanisms of markets and competition (the invisible hand) are the best to create wellbeing in our societies.*
- *Economic growth is necessary to increase wellbeing, to improve the living conditions of the poor and to reduce inequality.*

However, the extreme levels of inequality we have reached make it more than clear that the *invisible hand* only works for the few and that wealth is not *trickling down* like we have been told. In addition there is an undeniable contradiction between the fact that economic growth increases CO<sub>2</sub> emissions and that climate change destroys the very living conditions of the world's poor that economic growth pretends to improve in the first place.

Still, too many people can't let go of the idea that our current economic system is the one best adapted to human nature and that trying to change it would entail catastrophic consequences. For many, the collapse of the Soviet-style socialism is proof that there is no alternative to capitalism or that the fall of the Berlin wall was the *end of history* as argued by Francis Fukuyama.

Contrary to these dogmas, the idea of the Great Transition is based on the conviction that our current societal order and economic system (neoliberal capitalism) are not set in stone and that there are better alternatives beyond the false dichotomy of capitalism /socialism.

Nobody knows exactly what a sustainable world will look like and how we'll get there. There is a need to experiment with a diversity of ideas, approaches and policies. The vision of the Great Transition is a conceptual framework with principles and pillars for a sustainable global economy and society that provides a basic and flexible direction and pathways to get there<sup>7</sup>.

Regarding the scale of change it envisions, the Great Transition is comparable with the industrial revolution of the 18th – 19th century. As described by Karl Polanyi in his book *Great Transformation* (1944) it was precisely during the industrial revolution that Adam Smith's free market postulates were systematically put into practice and the basis of the market society (market economy and nation state working in unity) was shaped and expanded.<sup>8</sup> Over the past few decades, market expansion has accelerated and invaded almost every sphere of life. It has become the main mechanism directing our society. And we are not even questioning if this role is positive or not.<sup>9</sup>

*One of the most corrosive effects of putting a price on everything is on commonality, the sense that we are all in it together. Against the background of rising inequality, marketising every aspect of life leads to a condition where those who are affluent and those who are of modest means increasingly live separate lives. We live and work and shop and play in different places. Our children go to different schools ...*

– Michael Sandel –

The Great Transition proposes that we reject the role of the market as the underlying principle of our society and create a system that is not dependent on continuous economic growth. For this we need to fundamentally reinvent our core economic and political institutions. This will only be possible with the active involvement of civil society and a deep cultural shift that unleashes untapped political power and the desire for transformational change.

The Great Transition does not suggest that everything humanity has created is bad and should go. Much can and should be preserved. The establishment of universal human rights and the role of the state in guaranteeing equality and social security are achievements that should be preserved (or recuperated where growing neoliberalism and nationalism has put them at risk). The Great Transition is not a call for violent revolution – it is an attempt to avoid total system break down on the way to a sustainable future. The seriousness of today's systemic crises might well mean disruption, social upheaval and institutional breakdown, but the ultimate objective is a political and economic transition without violence where we keep what's worth keeping and change what needs changing.

# Here are some fundamental aspects of the Great Transition:

**A process of profound cultural change** The Great Transition cannot be a top down project. Instead it requires in-depth participation of civil society in the process of social innovation and democratic deliberation to create new social settlements.

**Wellbeing as the ultimate goal** The wellbeing of current and future human generations as well as of other living creatures has to be at the core of the system. Economic growth cannot be the main societal goal.

**A culture of sufficiency** Consumerist culture must be replaced by a culture of sufficiency. If consumerist culture is a social construction created during the mid-twentieth century (kicked off by Edward Bernays using psychoanalysis to market products and spur mass production<sup>10</sup>), an evolution towards a culture based on human needs is perfectly imaginable.

**Elimination of the logic of growth** The current capitalist system is growth dependant. When growth stalls, huge problems like mass unemployment follow. The new post-growth economic system needs to have a DNA change to eliminate its dependency on growth. The economy will only grow where it has to grow, e.g. where growth fulfils real human needs.<sup>11</sup>

**Rethinking the role of the market** The market has to serve society and not the reverse. There are many forms of economic (and non-economic) organisation that are not market based. If they are better suited to fulfil human needs, they should substitute current market approaches (see also box on page 32).

**Respecting ecological limits** New institutions and economic mechanisms (at all levels) have to be designed to ensure human activities operate within ecological limits.



**Economic re-localisation** An important element of the future system will inevitably be a huge re-localisation of economic value chains. Current global supply chains don't make much sense from a human needs perspective and cannot work within the logic of ecological limits. A higher proximity of the economy and the strict use of the principle of subsidiarity will be more sustainable, just and democratic.

**Taking care of our global commons** Interdependencies at so many levels will demand the design and creation of effective and democratic governance systems, particularly at the global level. New institutions and economic mechanisms (at all levels) have to be designed to ensure human activities re-generate the global commons.

**Putting equality at the heart of the system** We must acknowledge and reverse current and historical inequities including the unequal use of resources across the globe, unjust labour practices as well as the invisibilisation of minorities such as indigenous and peasant communities and other forms of marginalisation.

For some, the vision of such a transition seems utopian and it might well be. Nobody knows if the Great Transition can be achieved, but it is the only possibility we have to truly create a peaceful, just and sustainable world.

The good news is that things are already happening. Every day more people in radical pre-figurative movements are exploring ideas and experimenting with system change (see box on page 32). All of these movements share a core critique of market capitalism and advocate for alternative visions. Each of these movements hold strong ideas about alternatives to the current system. Many of their activists have been advocating for them for a long time. These are important processes on the journey towards a new social settlement. But it will require more exploration, organising and deliberation with much broader and wider parts of society. A revitalised democracy will play an important role.



## System change movements pre-figuring the future

**COMMONS MOVEMENT** – promotes a form of self-organisation and cooperation (*commoning*) between people to regain or protect free access to cultural or natural resources (the commons). Currently, these *commons* (e.g. knowledge, internet or land) are often *enclosed* by market and state actors so cannot be freely accessed. Enclosure increases and perpetuates inequality. The Commons movement strongly emphasises the act of *commoning* but is often ambiguous about the roles public institutions and the market will play in a future system.

**DEGROWTH MOVEMENT** – promotes a controlled decline of economic production (*degrowth*) and a new equilibrium relationship between human beings and nature. The aim of the Degrowth movement is to maximise wellbeing within ecological limits.

**INTERSECTIONAL FEMINIST MOVEMENT** – promotes a dismantling of the interconnected structures of oppression and a cultural and institutional shift towards gender equality. It sees the root causes for many of today's problems/crises in patriarchy that has persisted over the course of history and has created and sustained the capitalist system. The movement argues that feminism has to be at the heart of a transition to a new sustainable and just societal and economic order.

**SOLIDARITY ECONOMY MOVEMENT** – promotes economic organisation rooted in democracy, solidarity and ecological sustainability. It is closely linked to the cooperative movement as one way to organise in a more equal and democratic social order. For some the solidarity economy movement is about the abolition of capitalism and for others it is about a humanised capitalism. The movement is often not explicit about a post-growth economy and ecological limits.

**P2P MOVEMENT** – promotes self-organised, non-hierarchical collaboration in the form of mostly digital networks for co-production. The movement in general sees itself in opposition to the enclosure of the knowledge commons through copyrights etc. It works towards a future economy where self-organised production and consumption substitutes the current capitalist corporate economy. For many digital commoners the reality of ecological limits is not a core concern.

**BUEN VIVIR MOVEMENT** – promotes harmony between human beings and between human beings and nature, and subjugates the rights of the individual to those of peoples, communities and nature. Rooted in the worldview of the Quechua peoples of the Andes, *Buen Vivir* describes a way of doing things that is community-centric, ecologically-balanced and culturally-sensitive.



If you would like to dig deeper into the content of this chapter, here are some great resources:

- **Great Transition:** *The Promise and Lure of the Times Ahead* (2002)
- **Karl Polanyi:** *The Great Transformation – The Political and Economic Origins of Our Time* (1944)
- **Michael Sandel:** *What Money Can't Buy – The moral limits of market* (2012)
- **Fred Block and Margaret Somers:** *The power of market fundamentalism* (2014)
- **Degrowth** – *A Vocabulary for a New Era* (2015)

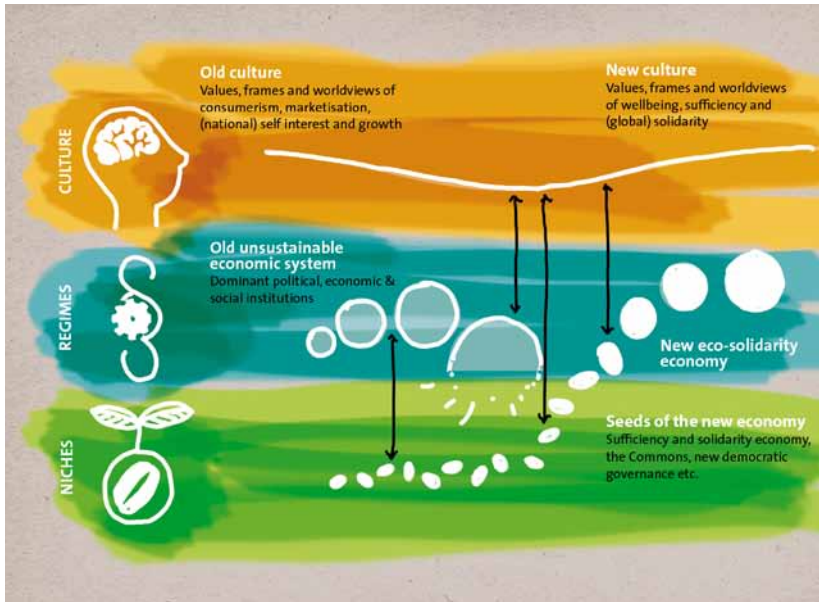
# Re.imagining change – the Smart CSOs model for system change

We don't love models for the sake of modelling or to have a nice intellectual discussion. Instead we have found that models can be practical and important tools for re.imagining our strategies. The questions at the core of the Smart CSOs model are: How do systems change? And what does existing knowledge tell us about how our broken economic, political and social systems could be fundamentally transformed so that life on earth can flourish within the means of the planet?

The empirical experience from transition research (Geels et al) helped us see how change happens at different, interconnected levels. We adapted these findings to our own needs. In the Smart CSOs model there are essentially three levels that are important to look at: the Culture, the Regimes and the Niches levels. The Culture level is where the dominant societal values and worldviews lie and eventually shift. The Regimes level is where the dominant political, economic and social institutions lie and where new or transformed institutions emerge. The Niches level is where pioneers experiment with ideas and seeds of the new system.

*You keep pointing at the anomalies  
and failures of the old paradigm,  
you keep speaking louder and with  
assurance from the new one, you  
insert people with the new paradigm  
in places of public visibility and  
power. You don't waste time with  
reactionaries; rather you work with  
active change agents and with the  
vast middle ground of people who are  
open minded.*

– Donella Meadows on how to  
change paradigms –




The model holds a number of core messages that are important to interiorise when developing our activist strategies:

- If we want to change the system, trying to convince the incumbent system players (Regimes) to fundamentally change is often futile. Most campaigns and advocacy strategies are currently focused on trying to shift the behaviour of governments, businesses and consumers. While this can be successful in promoting incremental change, it is usually ineffective from a system change perspective. Empirical research shows that institutions resist change very strongly and often self-stabilise when being pushed to change.
- For systems change, we need to work at multiple levels at the same time (Culture, Regimes and Niches).
- We need a much broader perspective on change that involves an understanding of the role of culture and radical innovation processes in


catalysing change. We need to become skilled at identifying and making use of meaningful windows of opportunity for change in the old system.

 **Activists, organisations and campaigns need to learn how to shift societal values and frames**


Most campaigns and activist strategies are not paying sufficient attention to the importance of culture in change. We rely too heavily on the power of information and rational argument. We communicate and represent values of self-interest, consumerism and growth, thereby perpetuating the current culture. The Great Transition demands a shift towards sufficiency, well-being and solidarity. Activists, organisations and campaigns can play a much more positive role in cultural change if they embody and communicate the values of the new system.


 **Pioneers are building the new system. They require our support.**

While there is a growing number of experiments with alternative economic models, most are simply tolerated by mainstream institutions or co-opted by the system to play by current market rules. In many civil society organisations, emerging radical system innovations are poorly understood; they possess insufficient faith in their ability to support and nurture niches to eventually become systems of influence. Disruptive innovators creating the seeds of the new system require support and protected spaces to incubate their innovations. If we can support these pioneers by helping them build communities of influence, they will become stronger, scale their innovations and eventually institutionalise a new system.


 **Instead of playing the game of politics, we need to use windows of opportunity in the old system to advance system change.**

System change is resisted by an elite and by institutions that defend and often abuse their positions of excessive and uncontrolled power. As long as groups with an interest in the status quo continue to effectively control the system, system change pioneers will be unable to institutionalise new economic models. Campaigns of protest, confrontation and resistance are necessary strategies in any system change portfolio.

 We need to learn how to create positive feedback loops between the three levels.

 For a successful Great Transition we need to make change efforts at all three levels that reinforce one another to create positive feedback loops. The strategic question here should always be: What effect could my action have on any of the levels and what feedback loops could it catalyse?

 To conclude ...

 The Smart CSOs model loses most of its value if we interpret it in a simplistic way. For example, be careful not to classify any given activist strategy or approach into one of the three levels without evaluating what core message the change level holds or what feedback loops might be created, supported or weakened. While the model is a useful and flexible tool for strategic conversations, it is not an all-explaining wonder box. We need to populate it little by little with knowledge and wisdom, from both theory and practice, to improve our understanding of system change strategies.

This model can help activists assess the potential of current strategies to encourage (or hinder) the Great Transition. It can also support strategic conversations focusing on new system change strategies and how they can mutually reinforce one another. In the next chapter we will explore some of these insights in more detail.



If you would like to learn more about the Smart CSOs Model for System Change, here are some great resources:

- **Smart CSOs Paper** – *How to break out of the systems trap? (2013)*
- **Smart CSOs Report** – *Effective Strategies for the Great Transition (2011)*

# The 10 principles for systemic activism

The following is an attempt to summarise the most important lessons we have learned about systemic activism in our community of practice. Throughout this guide we refer to these principles. We believe that taking them to heart can make a difference.

- 1** System change cannot be controlled in complex systems due to uncertainty. Be strategic, learn and adapt as you go.
- 2** Continuously expand your consciousness by learning to understand your underlying belief systems and those of others.
- 3** Think long-term in your strategies – it's OK to lose short-term fights for the sake of long-term benefits.
- 4** Always look for effective leverage points and root causes. Frame your campaigns around them.
- 5** The main enemy is the system and the culture that supports it – they shape everyone's behaviour. Even the powerful and privileged are locked into the system.
- 6** Always consider the effects your actions might have on the different levels of change (Culture, Regimes and Niches) and what feedback loops they could catalyse.
- 7** Ultimately the Great Transition will lead to new social settlements as a result of re-democratised deliberation – it can't be decided by small groups of elites.
- 8** Always try to express and encourage intrinsic values like compassion, empathy and creativity through your activities and in the stories you tell.
- 9** Be authentic – an over-reliance on tactics can be problematic if your authenticity is at risk (i.e. you have to sacrifice your values).
- 10** Avoid reproducing structures of oppression (sexism, racism, inequalities) in your movement.



## CHAPTER 4

# Re.imagining our strategies

In this chapter we will explore how to make meaningful steps to more systemic approaches and strategies. We have some examples and tools to offer to make this as practical as possible. We propose a number of roles that are each important to effectively support the Great Transition. Of course not every network needs to take on all of these roles; they can be fulfilled by different networks and organisations so that their efforts complement one another.

For the sake of this chapter we are assuming that your activist group, network or organisation has reached the decision that it wants to move towards more systemic approaches and that it is able to deal with the funding challenges this might entail. In chapter 5 we will deal with the organisational challenges this involves and in chapter 7 we will discuss how funding can become more systemic.



At the end of this guide you will find a worksheet for self-assessment of your strategies from a system change perspective. The 11 questions aim to help you analyse your strategies and provide guidance to identify opportunities to start changing your campaigns and strategies in a meaningful way. You can also download a pdf version of the worksheet here: [smart-csos.org/publications](https://smart-csos.org/publications)

## 4.1 MOVING FROM MAINSTREAM ACTIVISM TO SYSTEMIC ACTIVISM

In this section we are proposing three progressive phases of activism that lead to a level that can most effectively support the Great Transition – we call this highest level *systemic activism*.

You can use this model to assess which phase you are in right now on the journey from current mainstream activism to systemic activism as well as what needs to be done to become a driver of the Great Transition.

### CURRENT MAINSTREAM ACTIVISM

#### Phase One: Becoming a supporter of the Great Transition

**Frame our campaigns in a conscious way** by being aware of the values and frames that we communicate and their impacts.

**Create system awareness** and develop a deep system understanding of root causes and leverage points.

#### Phase Two: Becoming connected for the Great Transition

**Join a community of practice** – connect and learn with networks, organisations and movements involved in diverse struggles to expand your horizon beyond the issues you care about most.

**Connect with and learn from the pioneers of the new system.**

#### Phase Three: Becoming a driver of the Great Transition

**Put a system change vision in place.**

**Develop a common system change narrative** with other movements.

**Embed your campaign communications into a system change narrative.**

**Work with different roles** – systemic activism requires fighting the old, supporting the new, creating new discourse, building movement and working with a different level of consciousness.



### SYSTEMIC ACTIVISM



# Phase One:

## Becoming a supporter of the Great Transition

This phase is about avoiding harm. Every campaigning organisation or network that believes in the need for a Great Transition should at the very least review and potentially adjust their campaigns to ensure every effort made and every *pragmatic* campaign designed for incremental change supports the opportunity for more disruptive change in the future. In particular we should:

**Frame campaigns in a conscious way by being aware of the values and frames that you communicate and their impacts.**

- Avoid campaign goals that are in any way conflictive with the principles and aims of the Great Transition.
- Design campaigns in a way that it communicates values supportive of the Great Transition, e.g. we should avoid references to consumerist and self-interest values.
- Avoid frames that reinforce the market and growth paradigm for the sake of short-term objectives.

### First steps on framing

Imagine you work for a NGO that focuses on humanitarian aid. You recognise that the way that you talk to the public about aid reinforces a hierarchical worldview and you fail to explain why poverty exists. You could start to reframe your communications to reflect a more egalitarian and empowering worldview, and focus your campaigns on the causes of poverty and crisis such as tax avoidance or climate change ...

**Create system awareness and develop a systemic understanding of root causes and leverage points.** Any campaign – even the most incremental – should be the result of careful consideration that follows intensive systems thinking exercises. Your campaign strategy should be designed to support deeper systemic change as much as possible while the campaign might maintain a pragmatic short-term objective. We need to learn about systems thinking ...

### WORKING WITH VALUES AND FRAMES

#### VALUES

Values play an important role in social change. Cross-cultural research in social science has identified a set of consistently occurring human values. Social psychologists refer to one cluster as *extrinsic*, or materialistic. These are concerned with our desire for achievement, status, power and wealth. Opposite to those are *intrinsic* values. They relate to caring, community, environmental concern and social justice. Although each of us carries both, the importance we attach to one set of values tends to diminish the importance of the other. When power values like social status, prestige and dominance come first, the universal values of tolerance, appreciation and concern for the welfare of others are suppressed.

The U.K.-based Common Cause group is synthesizing this growing body of values research. It offers guidance to CSOs on ways to engage cultural values to further their causes. Because values are like muscles – they get stronger the more we exercise them – activists can consciously stimulate intrinsic values in communications and campaigns.

Researchers have also discovered what they call the values *bleed-over effect*. Because values tend to exist in clusters, when one is activated, so are compatible neighbouring values. For example, people reminded of generosity, self-direction and family are more likely to support pro-environmental policies than those reminded of financial success and status.

The lesson for systemic activists is that we need to be conscious about the values we are activating and reinforcing through our work. Our current culture is dominated by extrinsic values whereas intrinsic values are weakened. Re-balancing cultural values is central to the Great Transition and we need to learn how we can have a positive role in shaping values.

#### FRAMES

Words are not as neutral as we often believe. There is a hidden world underneath our words. Frames operate behind the scenes, affecting how

## STRATEGIC TOOLS FOR SYSTEMIC ACTIVISM I

we view things, large and small. They are like little stories triggered by the words we hear and the experiences we have. The way we see things is influenced by the words we use. For example the phrase *tax relief* makes us think of taxes as a burden, as something we need *relief from* instead of something that contributes to society for our collective benefit.<sup>12</sup>

Frames can be engaged deliberately and they are all the time: it's called *framing*. The advertising industry is particularly good at framing, or if you like, at *manipulating* us through its strategic choice of frames. For example, car ads show us empty roads to associate cars with freedom instead of associating them with negative side effects like traffic jams and pollution.

One of the important challenges we face when we think about framing for the Great Transition is that growth is generally associated with something positive, something that we can't live without. Growth is also considered a deep frame that we cannot easily change because it is so deeply embedded in our brains. In the book *Framespotting*, Laurence and Alison Matthews suggest a way to reframe growth as something that is definitely good (because children grow and we celebrate this) but only up to a point. Adults don't grow. Maturity is when you outgrow growth. "The best story of our times may be a *coming of age* story: if we can realise that a childish fixation on endless growth should give way to a more mature outlook, we will have *grown up*."<sup>13</sup>



If you would like to learn more about values and frames and how this can be applied in your strategies, here are some great resources:

- [Common Cause Handbook \(2011\)](#)
- [Finding Frames – New ways to engage the UK public on global poverty \(2011\)](#)
- [Common Cause Handbook for Nature \(2013\)](#)
- **George Lakoff:** *Don't think of an Elephant (2004)*
- **Laurence and Alison Matthews:** *Framespotting – Changing how you look at things changes how you see things (2014)*

## The Pope gives a lesson on Great Transition framing

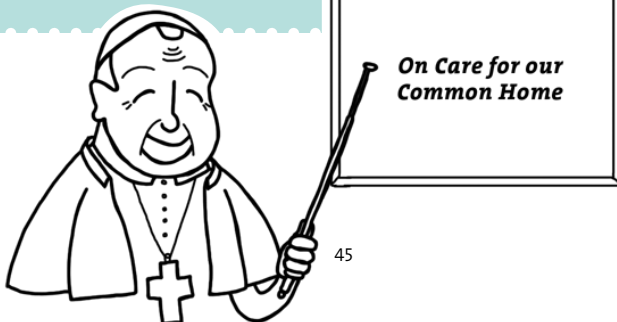
With his very political encyclical *Laudato Si* in May 2015 Pope Francis gave an important lesson on how to strategically frame the global systemic crises (especially climate change and inequality). Activists can learn a great deal from this carefully written piece of communication. The guru of cognitive linguistics George Lakoff was thrilled: “The pope has framed the issue so powerfully, often in language that flows most easily and readily from a Pope, and yet makes so much moral sense, whether you are Catholic or not, religious or not.”<sup>14</sup>

The title of the encyclical *On Care for our Common Home* establishes the most important frame right from the start: Using the metaphor of the *Earth as Home*, he triggers a frame in which all the people of the world are a family, living in a common home. As a family we should care for each other. A home is something we all depend on, physically and emotionally.

When the Pope says, “The alliance between the economy and technology ends up sidelining anything unrelated to its immediate interests”, he sharply points toward the underlying system logic of market fundamentalism lying behind inequality and the climate crisis.

Unlike so many mainstream campaigns, Pope Francis shows he is a superb systems thinker when he states: “To seek only a technical remedy to each environmental problem which comes up is to separate what is in reality interconnected and to mask the true and deepest problems of the global system.”<sup>15</sup>

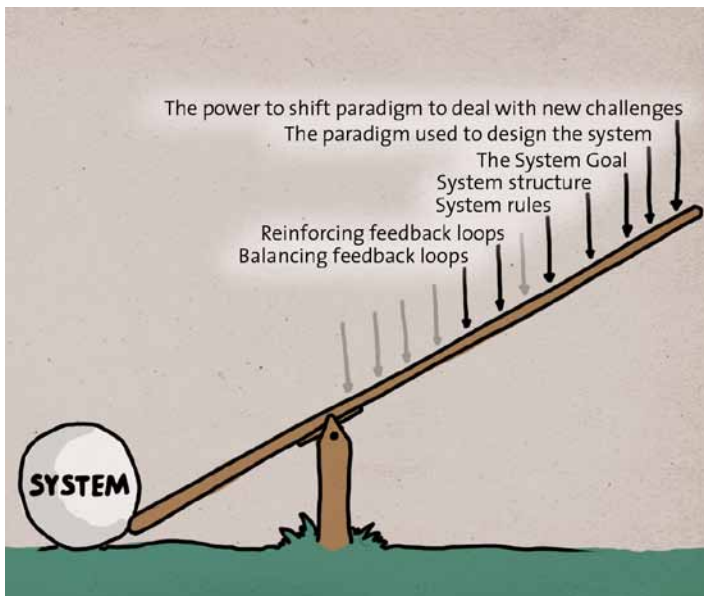
Maybe next time we are in search of effective frames for a system change campaign, we should reread the encyclical *Laudato Si*. Surely we will find something useful.



### HOW TO IDENTIFY EFFECTIVE LEVERAGE POINTS

For the Great Transition to become a reality, we must find places in the current system in which to strategically intervene for positive change. Donella Meadows (1999) called these places leverage points. Leverage points are points of power that when pushed, cause changes in other parts of the system; some are more powerful than others. For example, changing the goal of a system is a more powerful intervention than adding a new rule. Imagine if growth in human wellbeing were the goal of our current economic system rather than growth in GDP! That would be a more transformative change than simply implementing a new policy.

As systemic activists, our aim should be to find the most powerful leverage points possible or what we call *root causes*. Although there is no simple formula for identifying them, we can get better at identifying leverage points and learn how to push them effectively.

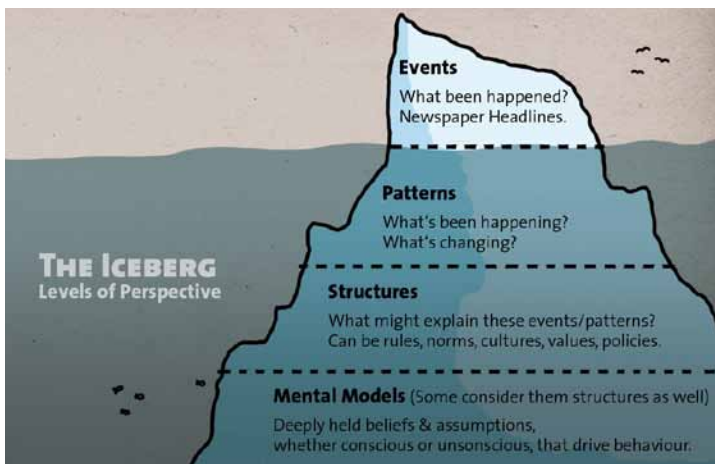




## STRATEGIC TOOLS FOR SYSTEMIC ACTIVISM II

As a first step, spend time mapping your system or problem of interest. A systems map is a visual representation of a complex system that helps you identify its components, their connections and the rules governing them. Free mapping tools are available online but hand-drawn diagrams can work just as well. The iceberg model shown here is a simple way to start revealing system patterns, structures and unconscious assumptions. Increased leverage for change can be found by diving to deeper levels of the iceberg. Addressing these deeper system levels can counter short-sighted decision-making and gets us off the symptoms-solving treadmill.

Another important tool for analysing complex systems is the *causal loop diagram*. These diagrams graphically depict system variables and the causal links between them. Importantly, causal loop diagrams help us identify positive and negative feedback loops so we know which direction to push for change. Meadows offered a tragic example of misunderstanding causal loops: world leaders have correctly identified economic growth as a powerful leverage point in our world system – they just push in the wrong direction. As chains of causes and effects are revealed through analysis, systemic activists can better identify why the system behaves the way it does and which variables they can strategically influence.



## STRATEGIC TOOLS FOR SYSTEMIC ACTIVISM II

### EXAMPLES OF PROMISING SYSTEM INTERVENTIONS / LEVERAGE POINTS

Here are just a few leverage points in our economic, political and social systems that we might want to work on. They could be considered high or very high leverage points due to their potential to shift the system considerably towards the Great Transition.

**REDUCING WORKING HOURS** – A re-distribution of work, i.e. fairer allocation of work, can be an effective leverage point to reduce unemployment and increase equality, as well as reduce carbon emissions, build stronger social connections and improve physical and mental health.

**BASIC INCOME** – Many believe that an unconditional basic income (i.e. every citizen receives an income by the state regardless of his / her working situation or other conditions) could be a very strong instrument for improving equality, ecological sustainability and wellbeing.

**COOPERATIVES** – Housing cooperatives (owned by the people who live there), workers cooperatives (owned by the people who work there) or consumer cooperatives (owned by the people who use the services) can be a powerful means to reduce the growth obsession of the economy and to create a fairer and more equal society.

**LOCAL CURRENCIES** – Complementary local currencies are seen by many as an important means for more resilience at local and regional levels. They can foster localisation of the economy and therefore be ecologically more sustainable.

**NATIONAL INDICATORS OF PROGRESS** One of the highest leverage points according to Donella Meadows is the goal of the system. The most important indicator of modern economies is the GDP: success of the system comes down to measuring economic growth. If we want to change the system, we need to change its goal. Bhutan's Gross National Happiness indicator is one example of an alternative.

## STRATEGIC TOOLS FOR SYSTEMIC ACTIVISM II

Once we have identified a promising leverage point, we need to explore potential windows of opportunity and our strategic capacity to move in this direction.



If you would like to dig deeper into how to use systems thinking and identify effective leverage points, here are some great resources:

- **Linda Booth-Sweeney and Dennis Meadows:** *System Thinking Playbook* (1995)
- **Donella Meadows:** *Leverage Points – Places to Intervene in a System* (1999)
- [www.donellameadows.org/systems-thinking-resources](http://www.donellameadows.org/systems-thinking-resources)
- [www.Thwink.org](http://www.Thwink.org): *Root Cause Analysis – How it works at Thwink.org*

## Phase Two: Becoming connected for the Great Transition

In our Chapter 1 assessment, we saw that our networks and organisations often exist in silos, unable to collaborate. We need to overcome this silo mentality.

**Join a community of practice** – Connect and learn with networks, organisations and movements involved in diverse struggles to expand your horizon beyond the issues you care about most. This is an important first step before thinking about coalitions or institutional arrangements of any kind. Even if your organisation is not yet ready for the Great Transition, you can personally join such communities of practice. By connecting with others and learning together how to change the system you will be contributing to the emergence of a movement for system change. .

### A safe space for learning

One of the success factors of the Smart CSOs Lab is that individuals join out of their personal motivation to learn about systemic change. They take their organisational hats off when they are in the space of the lab. The members of the community are involved in diverse struggles of activism but are united by a common purpose of respectful joint learning in a non-hierarchical space where they develop the necessary trust outside their institutional rules. The community provides a backbone for the difficulties members face when promoting systemic change in their institutional contexts.

**Connect with and learn from the pioneers of the new system** – Acquiring an understanding of the seeds of the new system will take you on a journey towards a more systemic world view and reinforce motivation for deeper change. Only if we understand what is already going on in these pre-figurative movements can we identify appropriate roles for ourselves and our organisations in the Great Transition.

## Phase Three: Becoming a driver of the Great Transition

Only in this phase are we developing true system change capacity. Through rigorous processes of questioning our own worldviews and assumptions we develop a new consciousness and systems understanding. Through the application of analytical systems thinking tools we develop strategies and narratives focused on effective leverage points.

### What if the Stop TTIP campaign had told such a story:

Governments are desperately fighting for a return to high economic growth and are willing to sell anything that might be in their way – our rights, health and environment among them .... But wait a minute! Something's wrong here. We cannot sacrifice everything we value – health, rights, environment, our livelihood – for the sake of say an additional 0,1 % of economic growth. And is more global trade really a good thing in the first place? Will it create more wellbeing or will it just destroy the environment while it makes a few rich a little bit richer? We need to discuss, where are the limits to this all? What alternatives are there that can improve wellbeing for all including future generations? In the meanwhile let's join our forces and stop TTIP to avoid making things worse.

**Put a system change vision in place** – This is of course not something you will do in two days. It is part of a bigger organisational change process (see chapter 5). The new vision is the framework of reference for everyone in your organisation / network and is therefore fundamental to move things in the same direction.

**Develop a common system change story** with other movements.

- Deconstruct the old stories by asking questions like: What are the stories we need to change? What are the underlying assumptions? Are there larger mythologies of the dominant culture that must be challenged?

- Construct a new story by creating an understanding of existing stories and cultural assumptions around an issue and ask: How does our story target underlying assumptions in the dominant story.

**Embed your campaign communications into a system change narrative** – Now you are a driver of the Great Transition. You have worked hard and have developed your systems change literacy. Your campaigns will never be the same again because no matter what your campaigns are about, you will skilfully embed them into a wider narrative of systemic change.

## STRATEGIC TOOLS FOR SYSTEMIC ACTIVISM III

### STORYTELLING

Storytelling is an effective and increasingly popular communication tool because contrary to the standard presentation of facts and numbers, it touches people on an emotional level. Stories make it much easier for us to remember the intended message. Today, storytelling is often being used to serve a short-term campaigning goal without necessarily considering its long-term impact on the way we think about the world and how we make sense of reality.

But stories can have much deeper cultural impact. In his book *Winning the Story Wars* acclaimed storyteller Jonah Sachs writes about the stories that have been told for generations, across centuries and even millennia. He calls these stories that make sense of the world *myths*. Sachs argues that especially in our times, some stories that have been valid for very long are no longer making sense to a growing number of people – these are called *myth gaps* or broken stories. When Occupy Wall

## STRATEGIC TOOLS FOR SYSTEMIC ACTIVISM III

Street started to gain attention there was a broken story that provided fertile ground for a new story to emerge, one that Occupy was shouting out into the world. This was the failing American Dream. The new story that has continued to grow ever since is the story of the 99% vs. the 1%.

*Winning the Story Wars* argues that we need to identify the perennial stories that are starting to break and tap into these myth gaps with powerful new stories that have the potential to replace the old ones. For the purpose of advancing the Great Transition, there are a number of failing stories that are calling to be replaced. Here are three:

**THE BROKEN STORY OF ECONOMIC GROWTH** – while the story is still powerful, there is a growing sense that economic growth is incompatible with tackling climate change. It is showing cracks. A better/new story would focus on wellbeing in a much broader sense than material wealth.


**THE BROKEN STORY OF THE INVISIBLE HAND** – in times of growing inequality, the belief in the *invisible hand* is vanishing. A better/new story is that a more cooperative economy suits human nature and helps the planet and people to thrive.

**THE BROKEN STORY OF TECHNOLOGICAL PROGRESS** – while this story is still powerful, the understanding is growing that the acceleration of technological innovation is part of the problem rather than the solution. A better/new story would deconstruct the link between wellbeing and continuous innovation.



If you would like to dig deeper into how to use storytelling effectively for systemic change, here are some great resources:

- **Jonah Sachs:** *Winning the story wars* (2012)
- **Patrick Reinsborough & Doyle Canning:** *Re:Imagining Change* (2010)
- **[www.storybasedstrategy.org](http://www.storybasedstrategy.org)** (check for [Story Based Strategy Chart](#))



**Work with different roles** – Not all systemic change is about campaigning. In the next section we will introduce different ways systemic activism can contribute to the Great Transition. Systemic activism requires fighting the old, supporting the new, creating new discourse, building movement and working with a different level of consciousness. There's a lot to do. Let's see how ...

### The Rules – Experimenting with different approaches and roles of systemic activism

The Rules is a global decentralised network of activists committed to deep system change. As we explore different roles of systemic activism, The Rules is difficult to define. It was created in 2013 by a small group of experienced campaigners with an excellent understanding of the failures and challenges of traditional campaigns and institutionalised civil society.

So they embarked on a truly innovative journey.

The Rules attempts to target key leverage points in the economic system as a way to advance system change. As one example, in 2013 it campaigned against the City of London as the Tax Haven of the World (i.e. its role in spurring tax avoidance of truly astronomical levels). It provides research and framing, funding and logistical support to grassroots movements, (e.g. Ekta Parishad, Kenyans for Tax Justice) and facilitates large coalitions of organisations to swarm around specific leverage points and issues (e.g. Our Land, Our Business, targeting the World Bank). Importantly, for such campaigns, The Rules connects Southern and Northern movements for maximum grassroots movement power.

More recently, The Rules has focused on deconstructing the narratives around capitalism and neoliberalism, and attempting to introduce a more powerful logic around the need for deep change into mainstream narratives.

The Rules mindfully chooses its frames to engage people. As one example it is engaging in reframing the story of poverty as something created by humans that requires system change and which cannot be addressed by charity.



Systemic activism requires  
*fighting the old,*  
**SUPPORTING THE  
NEW,**  
CREATING NEW  
DISCOURSE,  
*building movement*

**&** working with a  
**different level**  
*of consciousness.*

## 4.2 THE ROLES OF SYSTEMIC ACTIVISM

Here we introduce the different roles of systemic activism that your organisation or network can take on. Some might want to take on a few roles at once. Others will focus on one. This is a question of capacity and the theory of change you believe in. Ultimately, the Great Transition will require diverse but complementary strategies and roles. The systemic activism roles described below are meant to be strategic drivers of the Great Transition so we haven't included the role of the *pioneer*, namely those doing important work in their niches. Instead, they focus on supporting the seeds of the new system, movement building, fighting the power of the old system and helping shift entrenched narratives.

### Acupuncturist

Uses windows of opportunity in the political/economic system to target key leverage points that can help shift the system.

### Questioner

Supports deliberation on fundamental questions and helps create new discourse and a cultural shift.



### Broker

Creates meaningful connections and learning cycles around the question of system change between movements and networks at multiple geographical levels, including globally.



### Gardener

Helps the new system emerge by naming, connecting, nurturing and illuminating the pioneers of the new system.





## The Acupuncturist

Uses windows of opportunity in the political / economic system to target key leverage points that can help shift the system.

Social innovation labs have become quite popular in recent years. Much of what emerges from these labs sounds as if systemic change were entirely about collaboration and innovation. The self-stabilising nature of institutions and the power and vested interests of those who benefit from the status quo are often ignored in these contexts.<sup>16</sup> Capitalism has a great ability to co-opt these well-intended innovations when they can serve the interests of capital – as it happened with the *sharing economy*: Airbnb and Uber showed to be a rather brutal next stage of the neoliberal system. Capitalism can also *generously* ignore the niches of radical innovation as long as they don't threaten the system.

Without contestation and conflict we will not tackle the underlying logic of our collective problems and systemic change won't be possible. The Acupuncturist has a key role in identifying fights that are worth fighting from a system change perspective. Importantly, the focus here

is not about winning campaigns as it would be under the criteria of most mainstreams efforts.

It might well be that there is a window of opportunity to shift policy and that this can support systemic change but most importantly, the

Acupuncturist identifies fights that can change the logic of the debate, shift mind-sets and create new narratives.

So even if the campaign is lost in the traditional sense, if it helps to deconstruct old stories and shift frames, it is a win.



## Targeting fossil fuel divestment as a key leverage point for system change

Arguably the most interesting campaign of the climate change movement in the last few years is the Fossil Free Divest campaign kicked off in 2012 by Bill McKibben and led by the environmental group 350.org. Since 2014, The Guardian has led the spin-off campaign *Keep it in the Ground*, a real novelty due to the fact that a newspaper is campaigning on climate change.

The divest campaign / movement puts pressure on public and private investors to divest from the fossil fuel industry. There is a moral argument for this (four fifths of fossil fuels need to be kept in the ground to avoid catastrophic climate change) as well as a financial one (the value of these companies is a bubble if we are serious on climate change). A number of high profile institutions (Church of England, Glasgow University, philanthropic foundations etc.) have joined the movement and have started to divest.

The ultimate aim is to damage fossil fuel companies through reputation loss. The campaign seems to be a promising example of identifying very targeted leverage points in the system in addition to creating a powerful narrative around it in order to trigger deeper systemic change. To make the campaign even more powerful, more recently the idea of reinvestment has been added: “Now the institutions have an opportunity to reinvest in ways that are aligned with their civic duty. Divestment will unlock significant amounts of capital providing a massive opportunity to reinvest in social goals like energy democracy, affordable housing for all or universal education.” says Dr. Jo Ram, co-founder of Community Reinvest.

## The Questioner

Supports deliberation on fundamental questions and helps create new discourse and a cultural shift.

According to Harvard professor of political philosophy Michael Sandel, one of the great missing debates in contemporary politics is about the role and reach of markets. We are simply not addressing the big moral questions of our times. We are not debating the big questions that focus on justice, inequality or the common good because we believe that market solutions provide a neutral way of resolving conflicts. One result has been the loss of trust in our institutions. Many democracies debate today about technical issues instead about big values like justice or the common good. For the Great Transition to materialise, it is fundamental to regain these deliberative spaces. If politics is incapable of creating these spaces today, civil society must take on the role of opening and expanding them. We need to attract more citizens from diverse social groups and classes to participate in the fundamental debates of our times: What is the good life? What are the moral limits of markets? When do markets serve the common good and when are more cooperative approaches better suited? Pre-figurative movements deliver important ideas and valuable experiences but systemic change requires much bigger and broader social dialogue. In fact, it requires a renewed deliberative democracy that can create the basis of new social settlements for a truly just and sustainable society.

The Questioner takes on the important role of facilitating dialogues around these questions. This can involve different ways of engagement including arts, theatre and music.

Ultimately the Great Transition has to lead to new social settlements resulting from re-democratised deliberation – it can't be decided by small groups of elites.



## Friends of the Earth is engaging with the big picture in a new way

*Big Ideas Change the World* is the name of a project recently embarked upon by Friends of the Earth England Wales and Northern Ireland (FoE EWNI). It is the organisation's attempt to put the big questions on the table and start engaging environmentalists, academics as well the wider public in a serious dialogue about what is really needed to deal with the biggest challenges of our times.

The project was kicked off when the organisation realised their campaigning work was too incremental and not tackling the root causes of the worsening ecological crises. The organisation also felt that insufficient resources were spent on long-term thinking and strategy.

With the Big Ideas project, FoE EWNI has initiated an analysis and dialogue about long-term megatrends and how to address their root causes more effectively. While the initial dialogue has been limited to particular academics and thinkers, the aim is to broaden the conversation to the wider public after the initial phase closes with the launch of a book.

The upcoming strategy review will show if the organisation draws any conclusions from the Big Ideas project for their campaigning work. It might also reveal how much value the organisation attributes to such dialogue as a strategy in itself and as a way to expand the spaces to debate the big questions of our times.

## The Gardener

Helps the new system emerge by naming, connecting, nurturing and illuminating the pioneers of the new system.

A transition to a radically different economic system is nothing that can be planned by an individual or result from top-down, pre-conceived strategic plans. The economy is a highly complex system that can only radically change through emergence. Emergence happens when “separate, local efforts connect with each other as networks, then strengthen as communities of practice. Suddenly and surprisingly a new system emerges at a greater level of scale. This system of influence possesses qualities and capacities that were unknown in the individuals. It isn’t that they were hidden; they simply don’t exist until the system emerges. They are properties of the system, not the individual, but once there, individuals possess them. And the system that emerges always possesses greater power and influence than is possible through planned, incremental change. Emergence is how life creates radical change and takes things to scale.”<sup>17</sup>

To support the emergence of the new economic system, the Gardener has an important role in naming, connecting, strengthening and illuminating the pioneers of the new system, thus increasing the potential that the seeds of the new economy become systems of influence (e.g. community-owned modes of production, co-operatives, non-proprietary and open source solutions, etc.).





## Local initiatives in Catalonia cultivating the solidarity economy

The [Catalonia Solidarity Economy Network \(XES\)](#) and [Estarter](#) are two initiatives based in Barcelona that aim to strengthen, expand and improve the solidarity economy in Catalonia, Spain.

XES was already created in 2003 and has since served as a support structure and laboratory for new ways of working, consuming and investing. Among its now 150 institutional members are many cooperatives but also other types of social business as well as associations and informal organisations. XES promotes best practices among its members and helps create visibility by organizing annual solidarity economy fairs. XES doesn't see the solidarity economy as a silver bullet against all problems in today's economic system but as an important piece of an alternative system.

Created in 2013, Estarter is a small initiative set up by a group of local activists, academics and practitioners who saw there was a need for capacity-building on how to set up and run collective projects like cooperatives or community initiatives. Despite an extremely difficult labour market over the last few years in Spain, Estarter has organised and facilitated courses especially for young people to help them start their own cooperatives or other forms of solidarity economy entities.



If you would like to dig deeper into the theory behind the role of the Gardener, here are some great resources on how to work with emergence:

- [Using emergence to take social innovation to scale – Berkana Institute \(2006\)](#)
- [David J. Snowden, Mary E. Boone: A Leader's Framework for Decision Making \(2007\)](#)

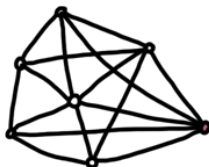
## The Broker

Creates meaningful connections and learning cycles around the question of system change between movements and networks at multiple geographical levels, including globally.

We live in a network society where people hive off to form clusters. This happens everywhere including the civil society context with its issue sectors, informal networks, movements and grassroots organisations. These clusters get stronger as people develop friendships, establish norms and build reputations.<sup>18</sup> Here are some consequences:

- Clusters develop their own language (e.g. shorthand symbols), information runs quickly across the cluster and the cluster develops a deeper shared understanding based on the same belief system. A self-sealing logic emerges: members read the same articles, the same books and generally re-confirm their own thinking.
- Information doesn't travel between groups. As a result of group-shorthand, it is hard for individuals from other groups to understand the full value and relevance of what is being said. In addition, the more our belief systems are based on different assumptions that we cannot easily unpack, the more we reject the information and ideas that come from other clusters.

Here the important role of the Broker enters the game. The Broker is needed to create meaningful connections between networks and clusters, to translate information so that it is understood by others and most importantly, to create learning cycles that help converge the thinking



and strategies of these different groups in activism and civil society.

The Broker creates more encompassing communities of practice by connecting activists from different clusters who want to learn how to change the system. Activists can find alignment with other clusters and work collaboratively for greater collective impact. By doing all this, the Broker has a system change-creating effect.

### New Economy Organisers Network

NEON was created by the New Economics Foundation in 2013 to connect progressive individuals from diverse contexts in the UK (civil society, activism, academia, media, etc.). It aims to strengthen the movement to replace neoliberalism with a new economy based on social and environmental justice.

The community now has more than 900 members mainly based in London although local groups are emerging across the UK.

With a great variety of capacity- building and community building activities, in only two years it has already built a thriving community out of formerly isolated change agents.

As a next step, NEON is now making connections with movements across Europe to share its learnings and learn from other groups.



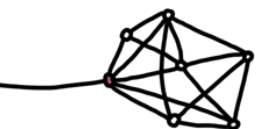
**Which roles do you see yourself in?**

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**Which role (s) could your network or organisation take on?**

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**What are your strengths?**



# Re.imagining our organisations

When it comes to considering system change strategies, most civil society organisations, including grass root networks, face some kind of constraint. We frustrate our colleagues, partners and constituencies if we don't fulfil their expectations (based on doing business as usual) and we have a reputation and trust to lose. Most funding schemes are far from supportive of the new approaches (involving higher levels of uncertainty) needed for long-term system change. But the most difficult constraint is the organisation's culture, its structure and way of doing things. A change in mind-set and the development of the right capacities are required.

This chapter explores some important enabling factors for organisations to work more effectively on deep economic and cultural change and offers approaches we can use to initiate change in our organisations.

## GETTING PREPARED TO WORK SYSTEMICALLY

### Setting the right criteria for success

Often success criteria focusing on short-term outputs such as shifts in government policy, fail to tackle underlying root causes and might thereby contribute to perpetuating the problems. The multiple crises of our times demand that civil society organisations commit to a vision that focuses on root causes rather than symptoms. To work successfully on system change, networks and organisations need

a coherent vision to tackle our systemic crises. This vision serves as a shared framework for all co-workers and helps align organisational objectives and strategies.

### **Structuring around solutions and systems**

Many organisations and activist networks are organised around specific issues. They have consequently developed organisational cultures of issue-expertise which are reinforced by professional pathways that drive toward specialisation. This means that much of the work happens in silos and the connections between issues remain unseen. Given the systemic and complex nature of today's problems, these silo responses are often inadequate.

To gain a more systemic perspective, it can be more appropriate for organisations to structure around systems and deeper leverage points (solutions). For example the way we live, work and travel has a profound impact on the way we shop and consume food, as well as on the amount of waste we produce. These life systems provide important leverage points that are not easily identified with a focus on problems like climate change or toxics.



## Decentralising decision-making

The hierarchical structure of many CSOs is the result of wrongly interpreting the best way to deal with complex systemic challenges. When traditional mechanical models of problem solving fail to provide satisfactory results in organisations, those at the top of organisations (and similarly funders) often start to mistrust their staff and introduce greater control mechanisms (including new reporting requirements and levels of hierarchy) as a way of dealing with failure. This command-and-control approach disempowers campaigners and project leaders. A great deal of energy is lost to internal conflicts and the success of the organisation's work is hampered.

Mechanical approaches are inadequate – systemic challenges require exactly the opposite. We need to take risks, experiment and learn as we go along. Research shows that neither top-down decision-making structures

nor organisations with a strong culture of consensus building are the best at dealing with systemic challenges. The most successful organisations are those with structures and decision-making processes that allow teams to

*What if power weren't a zero - sum game? What if we could create organisational structures and practices that didn't need empowerment because, by design, everybody was powerful and no one powerless?*

– Frédéric Laloux,

Reinventing Organisations –

make autonomous decisions. This avoids a huge amount of bureaucracy and creates an empowered workforce in which people feel responsible for their decisions. One additional feature that can ensure high quality decision-making is to establish an *advice process* where any person can make any decision but must seek advice from affected parties and people with expertise.<sup>19</sup>

In many CSOs structured by departments, fundraising and communication teams create powerful internal alliances and synergies that appear successful if measured by fundraising results. But a focus on fundraising goals can create time-consuming conflicts for those in the organi-

sation who want to see communication and fundraising activities serve transformative social change strategies. In order to become fit for systemic change, changing the organisation's structure is an important step. Cross-functional teams, instead of departmental lines, can enable more holistic strategies where fundraising and communications become important voices that serve the team's change strategy. The technical expertise of staff (e.g. fundraising or communications) can be cultivated through functional communities of practice operating across the organisation to realise synergies without exercising dysfunctional hierarchical power. Also for example the relationship between project leads and funders is more effective when it is direct rather than managed by a fundraising department.

Ultimately, the goal should be to create learning organisations based on free, horizontal exchange and flows of information, a commitment to learning and personal development, valuing people and their inborn creativity, a climate of openness and trust and learning from experience.<sup>20</sup>

### **Developing an open and collaborative structure and culture**

Often as a result of pressure to secure funding, organisations in civil society operate in an unhealthy environment of competition and distrust. Competition for resources and recognition impede the level of collaboration needed if our main aim is to put ourselves at the service of the common good. CSOs have become increasingly protective of their brands and isolate themselves against the outside world.

At the same time, many activists who in the past would have joined a professional CSO, turn their backs on what they see as hierarchical siloed institutions. Less formal, non-hierarchical flexible platforms are spreading. To be successful in this increasingly networked society, CSOs need to open their doors and become truly collaborative organisations.<sup>21</sup>

## LIVING THE VALUES OF A SUSTAINABLE AND JUST SOCIETY

Gandhi said: “Be the change you want to see in the world”. This wasn’t just a slogan, it was strategic advice. Gandhi knew that we cannot be successful in promoting a better world if we are unable to put those values into practice ourselves.

We know that values matter. They matter at all levels. The way people in a network or organisation interact with each other has an impact on the actions of members in the outside world. Also, in our interconnected world, the public knows what happens inside our organisations. We are under increased scrutiny and therefore authenticity (i.e. living what we preach) matters more than ever.

It is important to develop consciousness and self-awareness about values internally, but nobody should ask for perfection. We are all part of the system we are trying to change, and thus subject – to an extent – to its *rules*. Forgiveness for not being perfect and for not living up to some ideal is part of the story and makes an organisation’s culture more humane and therefore more values-driven.

### **Caring for people in the organisation**

Civil society organisations and movements reproduce the dominant practices of the competitive market environment. Often practices in the non-profit sector are worse because they are hidden under the appearance of a fair and democratic culture. Salary structures in professional organisations are often unfair and non-transparent – with the extreme cases of premium salaries for executive directors and zero pay for interns. Recruitment practices can reflect hierarchy, competition and market logic instead of equality, humane relationships and respect. In general, people management policies and practices as well as the way we treat our colleagues should be consistent with the values our organisation strives for (equality, fairness, less competition etc.).



## **Promoting diversity and freedom from oppression**

The environmental movement (and similarly other movements) has a history of being white and middle class dominated. An organisation that wants to be a credible advocate for a more equal and inclusive society should promote gender and ethnical equity, and avoid reproducing the structures of oppression that exist in the wider system. We should create and nurture a culture where we all can flourish.

## **Promoting work-life balance**

The culture of grassroots and professional civil society organisations can encourage and even demand that people dedicate almost their lives to the organisation's cause. Working through evenings and weekends is not unusual in some workplaces. There can be a common sense of urgency, a belief that we need put all our energy into saving the world before it's too late. This leads to burnout and frustrations, especially if the world is not saved after investing day and night as well as our health.

It's encouraging to see that some organisations are already instituting a standard 4-day workweek and discouraging evening and weekend work. Creating adequate policies and an internal culture of work-life balance can help us live the values we preach.

## **Practicing sustainability**

Some civil society organisations have strict policies in place aimed at limiting and reducing air travel through carbon budgets and/or travel policies. But many organisations and activists still give little attention to their work-related air travel – the excuse being that it's for an important cause and is different from the rest of air travel. The global travel circus of civil society needs to be examined critically. What air travel is really necessary? What can be done by video-conference or train? How many global conferences do we need to organise?

Other important environmental policies like food and energy sourcing seem to be easier to implement and can help organisations live their values and be more authentic.

## DEVELOPING ORGANISATIONAL SYSTEMIC CHANGE CAPACITY

### **Developing leadership skills for systemic change**

Along with changes to organisational culture and structure, working effectively on systemic change also requires substantially different leadership skills to those that have traditionally been promoted in CSOs. Some key leadership skills required for systemic change are:

(1) Leaders must be able to develop solutions collaboratively in international, cross-sectorial and non-hierarchical networks. (2) Leaders must be able to initiate and facilitate deep structural and cultural changes at the level of individuals, organisations and systems. (3) Leaders must become innovators and develop the sensitivity, determination and perseverance to engage in innovative action in environments of inertia, blockades and lack of support.<sup>22</sup>

### **Creating a good mix of skills and competencies for systemic change**

While issue expertise remains important, an organisation that is not mainly focused on producing policy documents and does not aim to have the answers on everything, needs a mix of skills and competencies that many organisations today lack. Among the skills needed to work on systemic change are thinking in systems, building/nurturing networks and movement organising (see also the roles of systemic activism in chapter 4.2). Overall, the Great Transition requires cultivating a good understanding across the organisation about the (economic and cultural) system challenge and the seeds of the new economy that are already emerging (in theory and practice).

# INITIATING THE ORGANISATIONAL CHANGE PROCESS

## Initiating change as a senior leader

If you are a senior leader and the senior management team is convinced of the need to shift the organisation to become fit for systemic change, you can then lead the process.

Embarking on a big strategic change project isn't easy and requires time – as the UK development organisation **Tearfund** discovered when their advocacy department began their own: *“Continuously questioning the status quo and engaging in system thinking is a complex and uncomfortable challenge that bears the temptation to fall back into old patterns of thinking and working. At the same time the right balance must be found between trying something different and considering what is achievable and feasible in the scope of the organisation.”*

Organisations fit to work effectively on systemic change are characterised by a lack of hierarchy, a culture of trust and collaboration, and a spirit of openness. Rather than starting a purely top-down change process (never a good idea!), there should be a special emphasis on inclusiveness. The organisation needs to be brought on board as a whole and staff should feel inspired by the change.

To make such a process successful, here are some things to consider:

- Start the change process in the spirit of co-creation by inviting staff to co-own the process.
- Analyse the actors, positions, power structures and power dynamics within the organisation in the same way you'd analyse external actors when developing a campaign.

- Don't try to get everybody on board – it is often better to go for the change within some parts of the organisation first.
- Publish annual failure reports to foster a culture of transparency, reflection and learning.
- Create spaces for staff to reflect on their personal motivations and values (what they really think & what they really believe in).
- Cultivate organisational awareness and authenticity by drawing on the inner experiences of staff – when leaders and staff speak for themselves, it fosters trust and a shared sense of responsibility.

### **Bringing a network organisation on board for systemic change**

Based in Brussels, CIDSE is an international alliance of Catholic development agencies comprised of 17 member organisations from Europe and North America working together for global justice.

The financial crisis in 2008 was a wake-up call for the alliance: there was something fundamentally wrong with the system. They asked themselves whether their efforts for global justice and sustainability were enough or having the right impact. They realised they needed a radical change in their approach; their work was issue and policy focused, neglecting interdependencies and system lock-ins. The CIDSE team organised a workshop to bring the alliance together to analyse and respond to the situation.

The workshop proved to be a light-bulb moment for many member organisations. The alliance agreed to develop a new mandate to address systemic change, to rethink the current concept of development, and to build new coalitions that reflect the global power shift. In this process the power of working collaboratively was clear: had it not been for their collaboration, member organisations could have found themselves with radically different understandings of what working for global justice means. Of course, questioning the current paradigms that we live and work within is not always smooth sailing. Over the course of the project CIDSE learned that articulating alternative paradigms takes time and requires frank discussions. People needed time to deepen their analysis of

current paradigms and that required continuous dialogue to clarify the terms of the debate and CIDSE's position. These discussions were especially necessary on controversial concepts like green or inclusive growth, as well as de-growth, in order to avoid misperceptions about where the organisation was headed.

Some of the fruit of the alliance's work can be seen in its 2016-2021 strategy, one which members were consulted on. The new strategy puts more emphasis on the democratisation of power and less on policy work. CIDSE conceives the new strategy as people-focused, one that will inspire with stories of change, strengthen existing alternatives, and support and strengthen communities of change.

### What to do if I'm not a senior leader?

If senior leadership isn't on board, initiating change in the organisation is more challenging but is still possible. Whatever structure your organisation has, you will need to bring others (and ultimately senior leaders) on board.

The following actions might be useful for you to get started and advance:

- Start small: invite colleagues for an informal gathering to discuss your concerns and ideas about systemic change.
- Invite an inspiring speaker to tell a convincing *we are winning battles but losing the planet* story, tailored at the organisational work context, to initiate a discussion among staff or members of your network.
- Create an internal community of practice of change agents who share a common interest for systemic change.
- Recruit at least one senior sponsor who can create a protected space for internal dialogue and provide resources for experimentation with new ideas.

- Try to make the space grow by inviting new staff to join the conversation – this can create momentum and the conditions for a larger organisational change process.
- Start an experiment: create a low-resource project or campaign based on system change strategies that will help you learn on a small scale and offer a success story to sceptical colleagues.

## THE ACTION EXPERIMENT – A TOOL FOR ORGANISATIONAL CHANGE

Regardless of your place in the organisational hierarchy, the organisational change strategies listed above become even more powerful if you approach them from an action learning perspective.

The idea behind action research (or action learning) is that our change efforts become more effective if done in continuous learning cycles (see diagram below). Action research demands that we break down big change inquiries like: *How can my organisation become fit for the Great Transition?* into more manageable questions like: *How can I get started tomorrow to increase my organisational support base?*

**Action Research is a disciplined process of inquiry conducted by and for those taking the action. The primary reason for engaging in action research is to assist the 'actor' in improving and / or refining his or her actions.**

– Institute for the Study of Inquiry in Education –

To embark on an individual or collective action experiment, break down your change goal into shorter learning cycles so you can adapt your actions as you move forward. While we might believe that we do this intuitively already, experience shows that effective action research requires a conscious effort to ensure our learning is meaningful. So we plan, take action, observe, evaluate and reflect in cycles.<sup>23</sup> As we bring in more and more people into the process, we create organisational capacity and become a learning organisation ...



If you would like to dig deeper into the content of this chapter, here are some great resources:

- **Frédéric Laloux:** Reinventing Organisations (2014)
- The Barefoot Guide 2 – Learning Practices in Organisations and Social Change (2011)
- GIZ: AIZ Leadership Toolbox – Leadership for Global Responsibility (2013)
- **Henri Lipmanowicz and Keith McCandless:** The surprising power of liberating structures – Simple rules to unleash a culture of innovation (2014)
- **Peter Reason and Kate McArdle:** Brief Notes on the Theory and Practice of Action Research (2003)



At the end of this guide you will find a worksheet for self-assessment of your organisation from a system change perspective. The 11 questions are a tool for organisational analysis and development from a systemic change perspective. You can also download a pdf version of the worksheet here: [smart-csos.org/publications](http://smart-csos.org/publications)

# Re.imagining ourselves as activists

## THE ROLE OF THE SYSTEMIC ACTIVIST

We can all agree that our world needs systemic change – it’s the reason you’re reading this guide! Moving from mainstream activism to systemic activism requires that we think differently about the world’s problems and their solutions. Traditional approaches to activism and social change mimic the culture they are trying to transform: the impulse to control and fix, us vs. them frames, reductionist interventions, win-loss mentality. Before we can be effective at systemic change, we have to critically examine our current assumptions and worldviews and then relinquish old ways of thinking that no longer serve us.

Besides decreasing our efficacy, traditional approaches to activism have another cost: they can leave activists feeling disillusioned and cynical. Social change is rarely linear but traditional activism measures success in a linear way, leaving activists vulnerable to discouragement and low self-esteem, and wondering if their work is even worthwhile.

When dealing with a complex system, it is important to remember we cannot stand outside it. The new system is unfolding before us in ways we can’t predict; we are part of the system we are trying to transform and we will change with it. Systemic activists need to be open to new perspectives and sensitive to shifting patterns and trends. The work of *re.imagining ourselves* as activists requires the cultivation of new skills, capacities and ways of seeing the world; the work is personal. Without changing our personal lenses, we will continue approaching our activist work in the same ways.



## System Leadership

Peter Senge and others who have studied system leadership have found three core capacities of systemic activists:

**1. ABILITY TO SEE THE LARGER SYSTEM:** instead of focusing on the parts of the system that are most visible, systemic activists should re-direct their attention to the whole. The problems we see *out there* are also *in here*.

**2. FOSTERING REFLECTION AND GENERATIVE CONVERSATIONS:** systemic activists should set aside time for thinking about their thinking. Our assumptions and mental models can limit our perspective and prevent us from truly understanding different views of reality.

**3. SHIFTING FOCUS FROM REACTIVE PROBLEM-SOLVING TO CO-CREATING THE FUTURE:** systemic activists should work towards building a positive vision for the future. Highlighting the gap between a future vision and the present reality generates creative energy.

Cultivating these capacities is not easy and requires practice. Individuals who become effective systemic activists commit to their own learning and growth.<sup>24</sup>

In his book *Theory U*, Otto Scharmer tells us that “two leaders in the same circumstances doing the same thing can bring about completely different outcomes, depending on the inner place from which each operates”. The logic seems inescapable: the quality of our understanding will have a direct impact on our success as activists. Because we are part of the system, our state of consciousness matters.

Donella Meadows believes that changing paradigms and the ability to transcend paradigms are the two most powerful leverage points in a system. What if we think of ourselves as one of the systems that needs transformation? How can we transcend our current paradigms and think differently as activists? This chapter offers some insights into the challenges we might face as systemic activists as well as some practical tools to cultivate new skills and capacities.

## CHALLENGES FOR SYSTEMIC ACTIVISTS

Activists are part of the bigger social system that needs transformation and are subject to its constraints. Even those of us committed to systemic change and the Great Transition have been conditioned to think and behave in the same ways as the prevailing culture. It's pretty much guaranteed that at times we'll fall back into the old habits and approaches listed in chapter 1. As we navigate this new path of activism, we must be patient and compassionate with ourselves. Being aware of the challenges systemic activists face will be helpful in avoiding some of the pitfalls ahead of us. Here are some common challenges you'll likely face as a systemic activist:

**CHALLENGING CULTURAL PARADIGMS CREATES RESISTANCE** – Systemic activists can be blocked, marginalized or even ignored as a result of system resistance. Our peers might feel threatened or confused by the new approaches we advocate. At times, we will be criticized, isolated or openly opposed, sometimes by our colleagues.

**PRESSURE TO ENGAGE IN TRADITIONAL FORMS OF ACTIVISM** – Systemic activists work under the same time and resource constraints as before. They will feel strong pressure to revert to old ways and old paradigms of activism even when they know they don't work.

**AN UNFAIR BURDEN OF PROOF** – We will be asked to prove ourselves, to show results but won't always be given the time, space or resources to experiment. Because systemic activists are working with complexity and emergence, taking risks and learning from failure are essential to their success.

**DEMAND FOR NEW SKILL SETS** – We have been committed to developing our smarts (expertise and analytical skills). The soft-skills of engaging people and working with emotions seemed less relevant, so we haven't invested time in their cultivation. Many of us don't feel competent or comfortable working with emotions or uncertainty.

### Evaluation tool: Have you fallen into the hero trap?

Take a moment to reflect on the statements below and note whether they seem true or false.

- You believe that if you just work harder, you'll fix things.
- You believe that if you just get smarter or learn a new technique, you'll be able to solve problems for others.
- You believe that people will do what they are told if you give them good plans and instructions.
- You believe that as a leader, you should have all the answers.
- You take on more and more projects and have less time for relationships.
- You believe you can save the situation, the person or the world.

If you answered *true* to most of these statements, chances are you've fallen into the hero trap. The myth of heroic leadership rests on the illusion that someone can be in control. The reality is that no one is in charge of complex systems and therefore, no one person can fix them.<sup>25</sup>

## SKILLS AND CAPACITIES FOR SYSTEMIC ACTIVISTS

A new kind of leadership is required to tackle the systemic problems we face: catalysing the Great Transition requires vision, empathy and wisdom as much as it does technical expertise and tactical know-how. Creating interventions and organisations capable of system change means we all have some transformative learning to do.

Transformative learning involves not only changes to our beliefs and behaviours, but a change in our understanding of ourselves. Becoming a systemic activist means critically reflecting on long-held assumptions

and making conscious efforts to expand our worldviews and develop our capacities. Below you will find a set of ideas and recommendations for those keen to re.imagine their roles as activists.

### **Study systems thinking and complexity science**

The dominant culture has conditioned us to analyse problems using simple cause and effect logic. In Chapter 1, we learned that the approach of traditional activism is to try to save the world issue by issue; it is often difficult for activists to see the big picture. In fact, George Lakoff argues that no human language has the grammar to express what he calls *systemic causation*. So seeing and explaining problems (and their solutions) with a systems lens will take some practice.

The good news is that there are lots of tools and resources out there to help us think and problem-solve this way. There are some key insights from systems thinking that will help us re.imagine ourselves as activists. For example, the complexity lens tells us that we cannot step outside the system. It tells us that we should expect the unexpected since complex systems do not behave in linear, deterministic ways. Complexity science also shows us that initial conditions matter greatly. Systemic change requires preparedness and opportunity. Imposing our will on the social or economic landscape will backfire if we haven't sufficiently tuned into present realities.

We all know the world is complex but our strategies rarely acknowledge that complexity. Studying systems thinking helps us focus on observing and listening to pick up patterns in a changing environment. It can also tune us into emergence so we can support and amplify momentum for positive change.



If you would like to dig deeper into the content of this section, here are some great resources:

- [www.systemslearning.org](http://www.systemslearning.org)
- [www.wisironline.ca](http://www.wisironline.ca)
- [www.donellameadows.org/systems-thinking-resources](http://www.donellameadows.org/systems-thinking-resources)

### **Find (or create) a community of practice**

We have a lot to learn from one another. Working towards deep systems change means that much of the time, we can't rely on best practices. We will be experimenting with new interventions and models of change. As we develop new strategies and tools, we can learn from one another's successes and failures while deepening our understanding of the shared systems we all live within.

A community of practice is a group of people who share a common profession or concern. Practitioners self-organize to meet their own needs but are also committed to serving the needs of their peers. By sharing information, resources and experiences, members gain skills and knowledge that support both personal and professional development. Communities of practice take many forms. The Smart CSOs Lab is an international community of practice focused on systemic approaches to activism; others are smaller and more localized.

Systemic activists also need moral support. It is easy to lose perspective (and heart) when working alone or in a context that doesn't support new approaches to change. At times, we will feel misunderstood, marginalized or even persecuted. A community of practice provides support through on-going interactions with practitioners who share a common language and purpose. Don't underestimate the importance of connection with like-minded peers and colleagues.

## Focus on relationships

Relationships are critical to systemic activism. We all yearn for connection or what Hartmut Rosa calls *resonance*. The neo-liberal, capitalist world-view holds that *more* is the key to the good life. The tragedy of the modern world is that many of us have the world at our fingertips but the world no longer speaks to us. Alienation seems to go hand in hand with the dominant cultural paradigm. Rosa argues that the good life isn't realized through the accumulation of more things but is instead a way of relating to the world. Resonance is a way of relating that opens us up, makes us feel meaningfully connected and tells us something about the world.

Climate change and global inequality can easily leave us feeling overwhelmed. The urgency of the issues we face can pull us back to the *command and control* approach to change. As experts, we tell people what they should do and what they should believe and our success is measured by the number of votes we receive or the size of the audience we reach. By treating human beings as aggregates of beliefs and behaviours, we inadvertently disempower them and alienate them from our cause.

We can create spheres of resonance by providing social support and a sense of membership. Sharing our concerns and hopes for the future with one another serves as an important buffer against psychological stress and releases new energy for change. As systemic activists, focusing on relationships allows us to build trust, good will and social cohesion – we will *win* even if we don't always meet our short-term goals.

As a practice, tune in to your conversations and notice how often you're trying to convince or persuade someone to change their behaviour or adopt your point of view. Sharing good information is important but arguing probably won't get us very far in the long run. Instead, allow people to express their own feelings and insights. Pay attention to your interactions with citizens and colleagues and build in unstructured time for just being human together.



If you would like to dig deeper into the content of this section, here is a great resource:

- **Humble Inquiry:** The gentle art of asking instead of telling (2013)

### **Prioritize time for reflection**

We need time to think. The ever-accelerating pace of our world creates delusion, feeds our reactivity and increases our feelings of insecurity. Developing our capacity for reflection is a counter-balance to the acceleration of our culture. As activists, we have the tendency to jump from belief to action quickly but we must not succumb to the eleventh hour syndrome.

The authors of *Getting to Maybe* believe that *standing still* is an essential skill for systemic activists. Standing still is the capacity to see and understand complex systems and adjust one's actions according to that understanding. It is about marrying reflection and action; the world interacts with us, and changes as we act upon it, so we need to get good at observing, reflecting and acting in a cyclical rather than linear way.

Prioritizing reflection is also critical in the transformation of our consciousness as activists. Hartmut Rosa tells us that the problematic drive for growth and acceleration that guides our current economic system *also lives in us*. The logic of growth is embedded in our heads and souls: we want to increase our knowledge, expand our reach in the world, engage more people, be more productive. Regular reflective practice illuminates beliefs, assumptions and mental models that operate unconsciously in our lives. It is the gateway to deeper self-awareness and decreases the likelihood we'll reproduce problematic values in our work.

We need to cultivate our intuition and start trusting it more – intuitive, reflective ways of knowing will help tune us in to new patterns and help us see problems differently. Good ideas often take time. Systemic

activists should cultivate the discipline of stepping back, reflecting and observing the world and its problems from a wider perspective.



If you would like to dig deeper into the content of this section, here are some great resources:

- [Dave Gray video: Liminal thinking](#)
- [Hartmut Rosa video on resonance \(speech at degrowth conference 2014\)](#)
- [Steven Johnson: Slow hunch – Where good ideas come from \(TED talk\)](#)

### **Engage the whole person**

As activists, we carry a heavy burden. Our work requires us to confront the stark realities of climate change, economic inequality and human suffering on a daily basis – it takes an emotional toll. The sensitivity that led us to the work of activism in the first place can become problematic if we ignore our emotional lives; as our psychological defences go up, our awareness tends to go down diminishing our intellectual performance and our compassion for others.

Along with preventing burnout, understanding the emotional impacts of the problems we face as activists provides critical insight into the resistance we experience in society. The people on the other side are not always our enemies. The apathy we witness from the human community is less about not caring and more about our fear of distress, guilt and the growing sense of powerlessness. Although we don't all have to become psychologists, we need to respect the power of psychological dynamics within individuals and communities. When we've grappled with our own emotional resistance, we are much better able to understand that of others.

Bringing your whole self – the emotional and the intellectual – to the work of activism takes courage. It requires strength to work in what



Quaker activist Parker Palmer calls the *tragic gap* between where we are today and where we know we could be. Acknowledging the emotional dimensions of our work makes us more effective as activists, and the work itself more meaningful.



If you would like to dig deeper into the content of this section, here are some great resources:

- **Joanna Macy:** *Coming Back to Life – Practices to reconnect our lives, our world* (1998)
- **Parker Palmer:** *A Hidden Wholeness – The journey toward an undivided life* (2004)
- **Per Epsen Stoknes:** *What We Think About When We Try Not To Think About Global Warming*
- **Susanne Moser:** *Getting Real About It – Meeting the psychological and social demands of a world in distress*

### **Cultivate humility**

We live in an achievement-oriented culture. As professionals and individuals, we are conditioned to define our value by our achievements. We celebrate successes and strive to know more as a way to feel good about ourselves. And we do our best to cover up or explain away failures. Somewhere in there, learning gets lost.

Systemic change means entering new territory and experimenting with new strategies. We play the game of politics and business because we know it. Although ineffective, the game is a familiar one and gives us a feeling of competence and control. When working on complex problems, we must come to terms with the reality that much of what happens in the system is out of our control. Often, we deserve less credit for successes and less blame for failures than we imagine. As systemic activists, we can't rely on past experience or best practices to solve problems – if we want to learn, we need to become comfortable with failure.

Letting go of controlling and fixing is also freeing. When we relinquish the notion that we can be the hero and fix all the problems we see in the world, our focus shifts to our unique strengths and abilities. We can take our place in the wider community of activists and change leaders and collaborate for collective impact.

### **Build personal resilience**

The role of the activist requires energy and stamina and forging a new activist path requires even more. Our work is motivated by core values and can be hard to put aside at the end of the workday. The feeling of *there's always more to do* often leads to overwork. The work of activism also requires that we hold knowledge of overwhelming social and environmental problems in our awareness. At different times in their careers, systemic activists will face uncertainty, fear, confusion, exhaustion and perhaps even burnout.

Burnout is a sign of imbalance between our activist goals and our personal needs. To ensure our own health and wellbeing, we need to be diligent in taking care of our bodies, minds and spirits. Take care of your physical health by spending time outside and getting enough exercise. Find at least one or two close colleagues or friends who can listen when you need emotional support. Explore practices for cultivating inner peace and calm and commit to one that works for you.

## Signs of burnout

Burnout is a “chronic state of being stressed and out of synch with work”. Watch for the early signs to prevent the painful experience of burnout:

- 1. EXHAUSTION:** feelings of being overextended, stressed and depleted of emotional and physical resources. You feel drained and lack the energy to face the challenges in front of you.
- 2. CYNICISM:** responses to various aspects of work are negative, callous, resentful or excessively detached. What begins as an emotional buffer leads to a loss of idealism and enthusiasm for the work.
- 3. INEFFECTACY:** feelings of a lack of achievement, and resulting doubts about self-worth.

Burnout is a sign of imbalance. If you experience any of these dimensions of burnout, take some time out to rest and restoration.<sup>26</sup>



If you would like to dig deeper into the content of this section, here are some great resources:

- **Joanna Macy and Chris Johnstone:** Active Hope – How to face the mess we're in without going crazy (2012)
- **Mary Pipher:** The Green Boat – Reviving ourselves in our capsized culture (2013)
- [www.contemplativemind.org/practices/tree](http://www.contemplativemind.org/practices/tree)
- **Cox Laurence:** [How do we keep going? Activist burnout and personal sustainability in social movements \(2012\)](#)

## Remember what you're fighting for

One last invitation: Get out from behind your desk and engage directly with the community you're working for. Talk to your stakeholders face to face. Connect with nature. Spend time with colleagues without an agenda. An analytical understanding of the issues we work on isn't sufficient to keep us going. Our passion and motivation for systemic activism will only be fed by an experiential connection to the people, places and living things we care about.

## GOING FORWARD

Re-imagining ourselves as activists opens us up to a new relationship with our work and our community. It restores our sense of hope and meaning but requires a lot from us in return: courage, faith in ourselves and faith in others, patience and perseverance. Donella Meadows likens the scale of the Great Transition to that of the agricultural and industrial revolutions. We have a big job in front of us, so let's commit to a path of learning, self-exploration and growth.

Meadows offers systemic activists five tools – along with some inspiration – for this third revolution in human culture: visioning, networking, truth-telling, learning and loving. The last might be the most important:

*"It is not easy to practice love, friendship, generosity, understanding, or solidarity within a system whose rules, goals, and information streams are geared for lesser human qualities. But we try, and we urge you to try. Be patient with yourself and others as you and they confront the difficulty of a changing world. Understand and empathize with the inevitable resistance; there is resistance, some clinging to the ways of unsustainability, within each of us. Seek out and trust in the best human instincts in yourself and in everyone. Listen to the cynicism around you and have compassion for those who believe in it, but don't believe it yourself."*

## CHAPTER 7

# Re.imagining funding

In chapter 1 we referred to two groups of grant making organisations. In the first group are those with vested interests in the current system. Their funding schemes have been intentionally designed to meliorate the negative symptoms of an unsustainable and unjust system but to preserve the privileges and interests of philanthropists. The second group are all other funders: conservative or progressive, but with some potential to contribute to the Great Transition. In this chapter we are dealing exclusively with the latter. The ideas we explore are meant to be useful for decision makers in grant making organisations and for activists who want to contribute to making funding more systemic.

The strategic considerations in the previous chapters of this guide are as relevant to grant making organisations as they are to grantees. But within this broader need for strategic reflection on how to become more effective in tackling systemic crises, grant making organisations face some fundamental differences. The differences can be reduced to one word: *money*.

## MONEY AS A PROBLEM

### Systemic activism lacks money

Even if the *revolution will not be funded* (as the same named book argued<sup>27</sup>) and even if we question the purpose and effectiveness of much of the money donated for civil society efforts, in order to make effective contributions to the Great Transition, grass roots activists and professional civil society organisations require some level of funding. Even more, the fact that most funding schemes do not currently support

systemic change strategies is arguably the biggest barrier for a more systemic activism.

While in recent years more money for social change has been available in the global funding system, a declining share of this money has been invested in tackling root causes. As a result, the long-term impact of this funding might actually be diminished.<sup>28</sup>

*It is difficult to find anyone who is happy with current funding systems [...] Funders feel they cannot achieve the impact that they want, while practitioners feel they cannot get the money that they need, especially long-term, flexible funding to confront the really difficult issues."*

– Michael Edwards –

In their anxiety to better control the impact of their money, most mainstream funding schemes ask for narrowly defined single-issue outputs instead of supporting long-term innovative system change strategies. In addition, the popularity of social entrepreneurship and impact investing shows that many in the funding community see the market paradigm as a solution rather than a problem.

Because funders control where the money flows, to an important degree they hold the key to a fundamental shift in civil society and how activism is done.

## Dirty money

There is a paradox in the fact that most of the grants provided by foundations originate from investments that cause the problems their funding aims to fix.<sup>29</sup> If funders want to be part of a movement for system change, they need to go further than implementing responsible investment strategies. The role their investments play in sustaining global corporate capitalism needs to be considered more fundamentally.

*Profit-oriented conservation of wealth is where a lot of our problems originate*

– Farhad Ebrahimi, Founder and Trustee  
Chair of Chorus Foundation –



### **Control and hierarchy**

Many donor organisations are highly hierarchical and non-transparent. The mainstream funding system mimics the market society: whoever has the money has the power. This neither empowers activists nor does it lead to good funding decisions. Without developing relationships of trust with their grantees it is impossible to create a common understanding between funders and grantees about proper system change strategies. As discussed in chapter 5, today's global systemic crises require more open and collaborative organisational structures and cultures.

## **HOW TO BECOME A SYSTEMIC FUNDER?**

Although it might seem overambitious considering the current state of the sector, a vision of systemic funding would imply to put the money in the service of a joint activism between conscious funders and activists. Funders need to embark on a challenging journey of self-reflection and transformation that involves difficult discussions about money, wealth, privilege and power.

## Changing the donor organisation

Many of the ideas and recommendations explored in chapter 5 are as relevant for grant giving as they are for grant receiving organisations. Given the unique challenges donor organisations face, funders should pay particular attention to the following issues so they can become effective supporters (and catalysers) of the Great Transition.

**PUT SYSTEMS THINKING AT THE CORE** – Train the organisation’s leadership and staff on systems thinking. It is the basis for rethinking the funder’s role in tackling systemic challenges.

**PUT A SYSTEM CHANGE VISION IN PLACE** – Involve all staff in the development of a new vision aimed at tackling root causes of the current systemic crises. It should guide all investment and grant making strategies.

**MIRROR THE SOCIETY YOU SEEK** – Change the way you act as a donor by becoming a more transparent, collaborative and democratic organisation. This will involve questioning long held beliefs about your role as a funder and giving up power and privileges as well as control over funding schemes.

**MAKE YOUR GRANTEES PARTNERS** – Switch from controlling to co-designing funding strategies with activists. Create spaces for joint learning and reflection. Great Transition strategies and funding schemes will become more powerful when the strategies are co-owned by funders and activists.

### The Edge Fund is run by its members

The Edge Fund was founded in 2012 by a small group of individuals in the UK to address the stark power imbalances in the funding environment and to open up funding for those excluded from traditional models. They wanted to get money to groups that work for systemic change, and to those led by communities facing injustice, which are often too marginal, informally structured or radical in their aims to be considered by other funders.

To challenge these inequalities, Edge Fund decisions are made collectively by those who donate money and those who receive it. Membership consists of donors, activists and members of communities facing oppression and injustice. Members pay an average membership fee of



£15 per month – and every member has equal voice in the organisation. Transparency and accountability are crucial to the model.

Edge Fund also creates opportunities for people and groups to build alliances with each other, in particular those they might not normally cross paths with, and to share their learning and experiences.

The highly diverse, member-led organisation now has over 100 members across the UK. Advisory Groups ensure that voices from these diverse communities are heard including those representing women, ethnic diversity, gypsy, Roma and traveller communities, activists and environmentalists, immigrants and refugees, and disabled people.

### **Putting all money at the service of systemic change**

The Great Transition cannot be controlled but we can build on existing strategic knowledge. Donors should interiorise the analysis and strategic advice in chapters 2 – 4 of this guide and explore how their money can contribute to such more systemic and therefore more effective activism. Here are some ideas for how you can make your money work more effectively for the Great Transition:

**FUND THE FOUR ROLES OF SYSTEMIC ACTIVISM** – As explored in chapter 4, the Great Transition requires a range of strategies and roles of systemic activism. All four roles – the Acupuncturist, the Gardener, the Questioner and the Broker – are important and will have a powerful effect if they are put in place in parallel. But they are currently under-resourced. Funders should work with activists to strengthen all four roles.

**FUND CAPACITY-BUILDING AND SPACES FOR LEARNING AND REFLECTION** – Funders and activists alike need to develop systems thinking capacity to deal with the complexity of systemic crises. We all need to learn about root causes and leverage points, question our worldviews and assumptions, and deepen our understanding of the underlying belief systems of ourselves and of other activists and funders. All this will help to create common understanding and strategy, which is what we need to build movement for the Great Transition. There is little funding available for such learning processes and spaces. Systemic funders should

support capacity-building because it serves as the basis for effective system change campaigns and approaches.

**SWITCH TO INDIE INVESTING** – Grant making isn't the only way funders can contribute to systemic change. Some far-sighted and innovative donors have started to shift their investments from the stocks and bonds market to the new economic models they aim to create through their grants.<sup>30</sup> Indie Investing could be a powerful way to accelerate the shift to a sustainable and just economic system. For example, strategically putting money at the disposal of co-operatives can support a shift away from financial capitalism.

**SPEND DOWN** – This approach means you are limiting the lifespan of your foundation by spending your capital faster than you replenish it. In 2013, the Chorus Foundation decided that climate change is such a pressing issue that the money needs to be spent now rather than when it's too late.<sup>31</sup> The foundation will be spent down by 2024. You might consider that there is an urgent need to catalyse the shift to a new economic system and that money is better spent now than in the distant future.

### **Re.imagining monitoring & evaluation (M&E): learning for systemic change**

Traditional ways of measuring the success of funding mechanisms have to be critically reviewed if we want to adopt a system change perspective and a normative framework like the Great Transition. To create new M&E mechanisms, activists and donors should develop a common theory of systemic change. Here are some ideas for how M&E for systemic change could look like:

**INCORPORATE UNCERTAINTY** – While improving scientific understanding of complex processes is vital, the fact of the matter is that uncertainty is an unavoidable part of systemic challenges. Hence, new monitoring and evaluation tools need to incorporate uncertainty and cannot focus entirely on narrow single-issue outputs.

**FOCUS ON LEARNING** – M&E for systemic change should evaluate how well, how fast and how honestly learning is captured. Learning should be openly available to both internally and externally so that activists can continuously improve their theories and practice of change.

**SET PLAUSIBLE MILESTONES** – Because the Great Transition is such a complex and rather long-term project, the individual contribution of any given campaign is impossible to measure. M&E for systemic change needs to set plausible milestones on the journey of the Great Transition, based on an agreed theory of change. Because the Great Transition is an evolving and organic process, missed milestones should not be seen as failure – they help us refine our theories of change (learning as a focus of evaluation).

**USE THE SMART CSOs MODEL FOR SYSTEM CHANGE** – The potential of a campaign to achieve systemic change can be discussed and evaluated with the help of the Smart CSOs model for system change (see chapter 3).



If you would like to dig deeper into the content of this section, here are some great resources:

- **Michael Edwards:** Beauty and the Beast – Can Money Ever Foster Social Transformation? Hivos Knowledge Programme (2013)
- **[www.indiephilanthropy.org](http://www.indiephilanthropy.org)**
- **[www.edgefunders.org](http://www.edgefunders.org):** an alliance of grant making organisations promoting a Just Transition that decommodifies nature, re.imagines work, liberates knowledge, and democratizes wealth.

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- <sup>31</sup> Chorus Foundation: [chorusfoundation.org/what-we-fund/](http://chorusfoundation.org/what-we-fund/)

# Glossary

**Civil Society Organisations (CSOs)** – Civil society refers to the arena of un-coerced collective action around social and environmental causes, purposes and values. CSOs commonly embrace a diversity of spaces, actors and institutional forms, varying in their degree of formality, autonomy and power. CSOs are often populated by organisations such as registered charities, developmental and environmental NGOs, community groups, women's organisations, faith-based organisations, trade unions, social movements and civil society advocacy groups and coalitions. Definition adapted from LSE Centre for Civil Society.

**Change agent** – A change agent is a person from inside or outside the organisation who helps an organisation or network to transform itself and to adopt system change strategies.

**Commons** – The Commons is the cultural and natural resources accessible to all members of a society, including natural materials such as air, water, and a habitable earth. These resources are held in common, not owned privately.

**Emergence** – Taken from the field of complexity science, emergence is a term that is used to describe events that are unpredictable, which seem to result from the interactions between elements, and which no one organisation or individual can control. The process of evolution exemplifies emergence.

**Extrinsic values (or self-enhancing values)** – Extrinsic values are values that are contingent upon the perceptions of others – they relate to envy of higher social strata, admiration of material wealth, or power (Common Cause).

**Frames** – Frames are the mental structures that allow human beings to understand reality – and sometimes to create what we take to be reality. They structure our ideas and concepts, they shape how we reason, and they even impact how we perceive and how we act (Common Cause).

**Great Transition** – Is a term initially used by the Global Scenario Group to describe a vision that includes egalitarian social and ecological values, increased human interconnectedness, improved quality of life, and a healthy planet, as well as an absence of poverty, war, and environmental destruction. In the Smart CSOs Lab we stress that the Great Transition needs to overcome the market-growth logic inherent to the current economic system.

**Intrinsic values (or self-transcendent values)** – Intrinsic values include the value placed on a sense of community, affiliation to friends and family, and self-development (Common Cause).

**Leverage point** – According to Donella Meadows’ definition, leverage points are places within a complex system (such as a firm, a city, an economy, a living being, an ecosystem) where a small shift in one thing can produce big changes in everything (see also page 46).

**Root cause** – Root cause is used to describe the depth in the causal chain where an intervention could reasonably be implemented to improve performance or prevent an undesirable outcome (Wikipedia). In the Great Transition context we are referring specifically to the root causes of the global systemic crises.

**Systemic change /system change** – In this guide the term systemic change always refers to a fundamental shift (Great Transition) in our economic, political and social systems in the broadest sense. It means tackling the root causes of today’s systemic crises. See also the box on page 26.

**Systemic activism** – An activism that is based on a good understanding of how to work effectively in complex systems and aims to catalyse the Great Transition. In chapter 4 we explore the meaning of systemic activism in depth.

# Worksheets for self-assessment

## SELF-ASSESSMENT OF STRATEGIES

Here we provide a series of questions to analyse your strategies. The questions aim to provide guidance to identify opportunities to start changing your campaigns and strategies in a meaningful way.

**To what extent do you believe we are ready to take a fundamental new path / get started towards some bold new strategies?**

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**Do you have a good understanding of the system we aim to change? Which are potential effective (high) leverage points that might shift the system?**

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**To what extent are there opportunities on the policy level that could plausibly contribute to a long-term goal of systemic change (focused on well-being, solidarity and ecological limits)? How are you dealing with usual lock-ins of the mainstream political and economic institutions?**

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**How value conscious are you with your strategies? To what extent are you strengthening helpful frames and avoid unhelpful ones?**

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**If your organisation decides to mainly focus on a particular issue (such as climate change or poverty), are you embedding the single issue in a bigger system change narrative? To what extent are you pointing towards the underlying logic (root causes) of the problems you aim to shift?**

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**Are you carefully considering the trade-offs between possible short-term wins and the potential long-term negative effects of reinforcing broken political institutions? Explain how.**

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**To what extent are you connecting to other issue movements and how are you learning about system change in collaboration?**

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**To what extent do you see yourself / your organisation in the role of an Acupuncturist, fighting key leverage points in the old system? How confident are you that you're not falling into the trap of personalising a system problem in excess?**

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**To what extent do you see yourself / your organisation in the role of the Questioner – curbing deliberative spaces asking the fundamental questions?**

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**To what extent do you see an opportunity for yourself / your organisation to support the seeds of the system (Gardener) with strategies of emergence?**

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**To what extent do you see an opportunity for yourself / your organisation in the role of the Broker, creating meaningful connections and learning cycles among movements?**

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## SELF-ASSESSMENT OF ORGANISATIONS

This section is a tool for organisational analysis and development from a systemic change perspective:

### On preparedness to work systemically

How do you define success in our organisation? To what extent do you believe that the way your organisation measures success is consistent with the change required to fundamentally tackle the issues you care about?

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To what extent is your organisation structured around teams focusing on single issues or on root causes (across issues) and solutions?

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**How decentralised is your organisation and decision-making processes? To what extent do you believe hierarchy is a problem?**

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**What is the relationship between departments such as communications, fundraising and programmes? To what extent do you believe it is a healthy balance or are communications and fundraising too powerful?**

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**To what extent is your organisation committed to true collaboration and knowledge-sharing with other organisations?**

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## **Living the values of a sustainable and just society**

To what extent is your organisation's people management with its policies and practice as well as the way you treat each other in your network consistent with the values your organisation strives for (equality, fairness, less competition etc.)

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To what extent does your organisation promote gender and ethnic equity and avoid reproducing any structures of oppression existing in the wider system while creating and nurturing a culture where we can all flourish?

To what extent is your organisation promoting work-life balance through adequate policies, work load and internal culture?

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**To what extent are your organisational policies in line with best practices in sustainability?**

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**Organisational capacity**

**To what extent do you believe that enough people in your organisation have the leadership skills required to work on systemic change?**

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**To what extent does your organisation have a good mix of the skills and competencies required to work on systemic change?**

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