AGENDA

PUBLIC HEALTH ADVISORY BOARD

December 6, 2021, 11:00 am-1:30 pm
https://www.zoomgov.com/meeting/register/vJItcempqz8iG6pmVsOTUtocin2VhZQnT1E

OR

December 9, 2021, 2:00-4:30 pm
https://www.zoomgov.com/meeting/register/vJIsfu-rpj0sHxQrqB4k56r15sC10PtIVW0

Meeting objectives:
- Health equity capacity building

11:00-11:05 am or **2:00-2:05 pm**	**Welcome and introductions** • Reminder that this meeting is split into two sections and no official board business will be held today. • Additionally, no public comment will be held at the December 6 or 9 session.	Veronica Irvin, PHAB Chair
11:05 am-1:30 pm or **2:05-4:30 pm**	**Health equity capacity building** • Session 2 – Health Resources in Action capacity building	Brittany Chen and Ben Wood, Health Resources in Action
1:30 pm or **4:30 pm**	**Adjourn**	Veronica Irvin, PHAB Chair

Advancing Equity through Systems Change

OR Public Health Advisory Board - Session 2
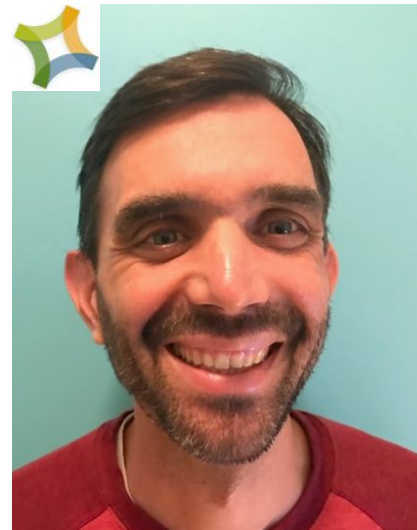
December 6, 2021 from 11-1PM PST

Our Team

Brittany Chen
Managing Director, Health Equity

Ben Wood
Senior Director, Policy and
Practice

Welcome! Pull up a chair around our circle

Join us in the learning circle!

Who's in the room?
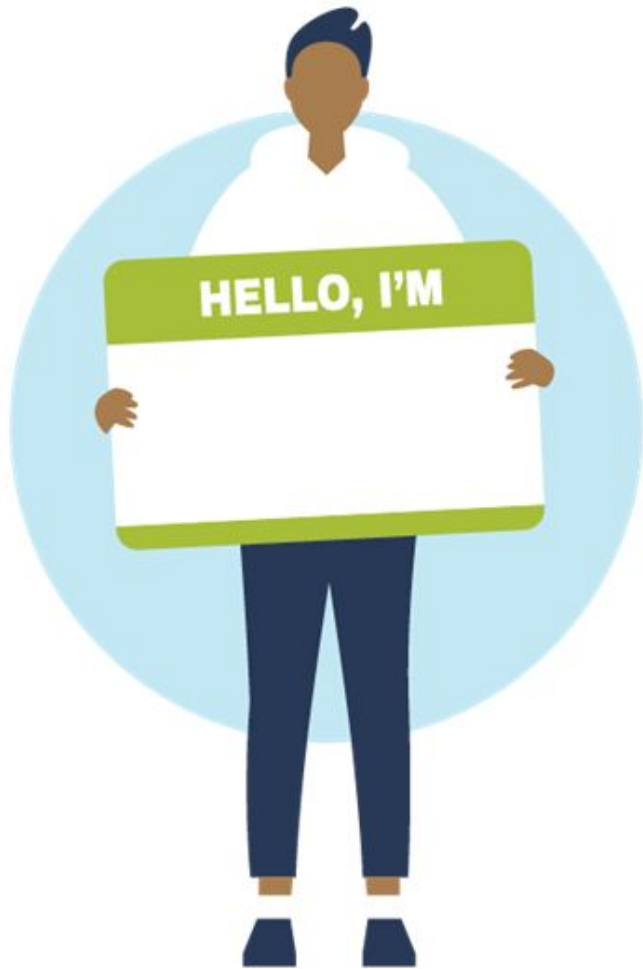
Participant Introductions:

In a couple of words, something you're looking forward to in the new year

Training Overview and Grounding

PHAB Learning Journey Goals

★ **Build relationships and trust** for connection amongst PHAB members and with the Public Health Division (PHD) and identify sustainable systems to maintain it (for existing and future members).

★ Come to a **shared understanding** of health equity, racial equity, and related concepts.

★ Collectively **reflect upon, unpack, and explore** application of the **Health Equity Review Policy and Procedure** as a guiding tool to support implementation of equity related practices.

★ **Identify possible priority areas** that PHAB may **proactively focus on** to support PHD's efforts to advance health equity.

PHAB Learning Journey

Session 2

Moving towards relational change - Power, collective ownership, and accountability

Session 4

Priortization and moving towards action

1 2 3 4

Session 1

Advancing Equity through Systems Change

Session 3

Moving towards structural change - Going upstream

Session 1 objectives

I.   Build additional relationships and connection with each other

II. Better understand the unique perspectives brought from the diversity of lived experiences in the PHAB

III. Gain additional understanding of Inside/Outside Strategies

IV. Deepen critique of current practices related to "How Health Equity is Attained"

Agenda

10 min — Welcome, introduction, and grounding

10 min — Recap of Session 1 and Review of Systems Change Framework

25 min — Deep Equity - Equity work as embodied work

5 min — Break

30 min — Inside/Outside Strategy - how do we shift mental models?

30 min — "How Health Equity is Attained" Critiquing current practices

5 min — Close

Group agreements

- Be present
- Take space, make space
- Challenge by choice, but do challenge yourself
- Bold humility
- Listen deeply
- Join by video, if you can!
- Have fun!

What else would you like to add?

Our approach to learning

There is a conversation in the room that only these people at this moment can have. Find it.

emergent strategy
adrienne marie brown

Who are we? Bridging head and heart

intellectual
investment

emotional
investment

Session 1 Recap and Systems Change Framework Review

Session 1 Recap

➔ PHD Level Setting and Reflection

➔ Systems Change Framework Overview

➔ Reflections on Health Equity Review Policy and Procedure Guide

◆ *Health Equity Definition, How Health Equity is Attained, Leading with Racial Equity*

➔ Minnesota Healthy Partnership Spotlight

Session 1 Reflections

➔ PHAB members identified areas of progress

◆ PHAB language on equity, PHAB support for changes to data collection/use practices, PHAB letters/testimony

➔ PHAB members identified areas for improvement

◆ Who is involved in PHAB processes

◆ Expanding what PHAB's role could be

How do we move towards equity?
Systems change review

What do we mean by "systems change"?

A fish is swimming along one day when another fish comes up and says, "Hey, how's the water?"

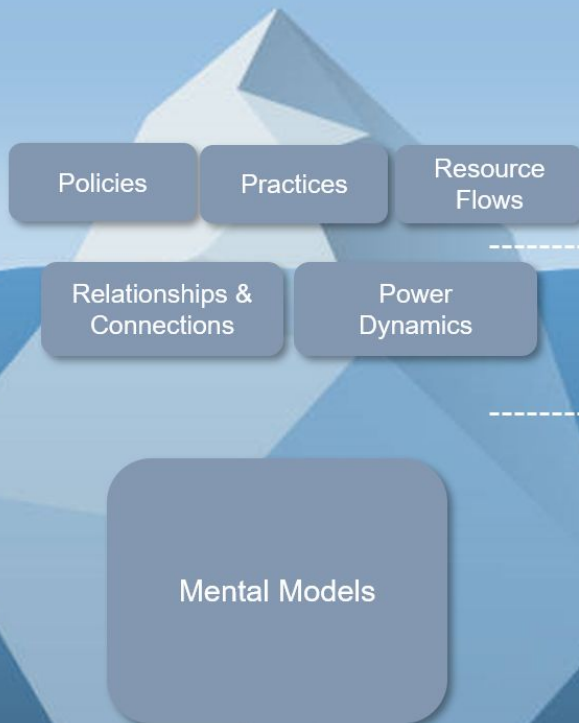*The first fish stares back blankly at the second fish and then says,* "What's water?"

THE LONGER YOU SWIM IN A CULTURE, THE MORE INVISIBLE IT BECOMES

Image source:
DismantlingRacism.org

How will we get there?

Six Conditions of Systems Change

Policies | Practices | Resource Flows

Relationships & Connections | Power Dynamics

Mental Models

Structural Change
(explicit)

Relational Change
(semi-explicit)

Transformative Change
(implicit)

"*Real and equitable progress requires exceptional attention to the detailed and often mundane work of noticing what is invisible to many.*"

FSG's "The Water of Systems Change"

Adapted from *The Water of Systems Change* (2018) by FSG

Systems change conditions - Definitions

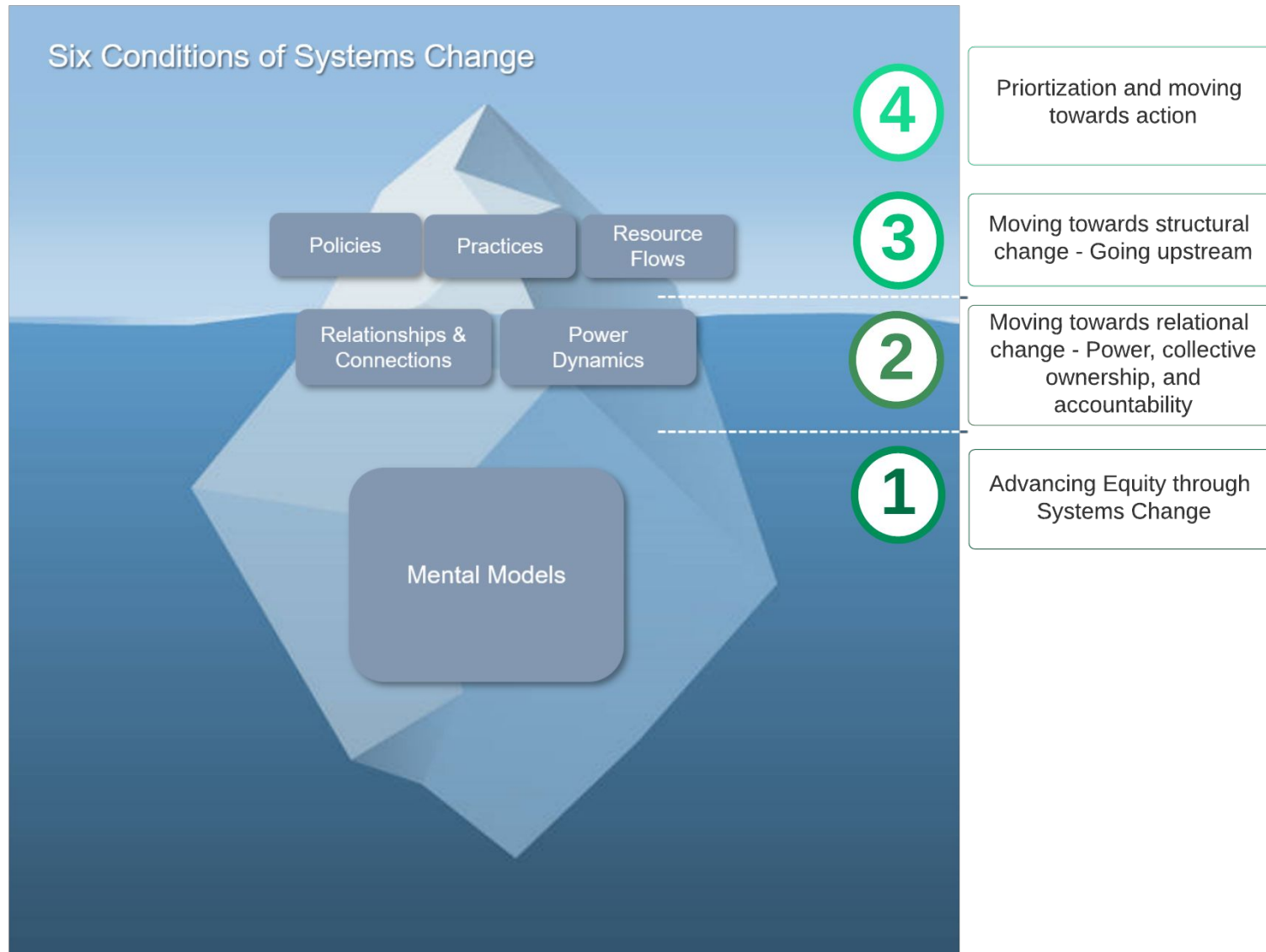| Policies	Government, institutional and organizational rules, regulations, and priorities that guide the entity's own and others' actions.
Practices	Espoused activities of institutions, coalitions, networks, and other entities targeted to improving social and environmental progress. Also, within the entity, the procedures, guidelines, or informal shared habits that comprise their work.
Resource Flows	How money, people, knowledge, information, and other assets such as infrastructure are allocated and distributed.
Relationships & Connections	Quality of connections and communication occurring among actors in the system, especially among those with differing histories and viewpoints.
Power Dynamics	The distribution of decision-making power, authority, and both formal and informal influence among individuals and organizations.
Mental Models	Habits of thought—deeply held beliefs and assumptions and taken-for-granted ways of operating that influence how we think, what we do, and how we talk.

Our Learning Journey

Six Conditions of Systems Change

Policies | Practices | Resource Flows

Relationships & Connections | Power Dynamics

Mental Models

4 — Priortization and moving towards action

3 — Moving towards structural change - Going upstream

2 — Moving towards relational change - Power, collective ownership, and accountability

1 — Advancing Equity through Systems Change

Systems Change and Deep Equity -
Finding New Ways of Being

AN ECOSYSTEM OF JUSTICE: HOW NEIGHBORS CAN BE

A Poem Story by Elissa Sloan Perry

Change Elemental CoDirector

Complex Systems Change was sitting. In a chair. At a desk. Looking. At data. Asking questions. Forming so called "liberating structures" that, as is, only liberate those he can see. In ways he can see. With feedback loops so meticulously considered they were a thing of beauty to him. Created so systems can learn and leaders can learn. To be adaptive.

He'd proclaimed this in a conference presentation. He did have good intentions.

His neighbor, Deep Equity, grew concerned. Complex Systems Change was maybe not Deep Equity's best friend, but Complex Systems was their[12] neighbor and Deep Equity cared about how pale and cut off Complex Systems was getting.

They[13] knocked on Complex Systems' door.

"I think you might be having heart problems." They said to him. "You are pale and move about the world as if your limbs are numb. Artist and Healer say you are always knocking into people, knocking things over. Breaking them. When you come to the central marketplace."

[12] Deep Equity's
[13] Deep Equity

"I'm not saying I'm perfect," Deep Equity said with a chuckle and a raised eyebrow. "People like to think I'm a noun but really I'm a verb. A constant work in progress. But this liberating heart is full in body to embody. I feel all the rough bark, soft moss, sap that runs when I'm glad to see you. It tells me things – this body – asks me questions."

"The kick in the chest of 'Just what the hell do you think you are doing?' Or. The dropping of center to root chakra of 'Yeah, you know this is right, right?'"

"This heart knows joy, and rage and terror and despair. They all flow freely and connect. Tears to body. Energy flowing. Source. And Back again. All the way to Story. The simultaneity of it all. Our stories hold it all. Indeed art may be the only thing that can."

"So maybe I got something can start to work on your innards. Get the flow going. Get you some knowing that comes from feeling your limbs, your body, your heart. Hell, just feeling period."

Well Complex Systems, you could've knocked him over with a feather. He felt plenty in that moment. He went from angry to fearful to ashamed to just floating in a matter of seconds as he stared at Deep Equity. Mouth agape.

He had gotten used to not feeling, and this? This was making him a foal on new born legs.

"Now looks like you got a jumpstart today, but I ain't the one. At least not yet."

Excerpt from Elissa Sloan Perry's *"An Ecosystem of Justice: How Neighbors Can Be."*

Change Elemental's Systems Change an Deep Equity: Pathways Toward Sustainable Impact, Beyond "Eureka!," Unawareness, & Unwitting Harm

"You need to start close in. Give your heart messages. Massages. Be with your partner, the Painter. Your child, the Musician. Just be with them. Watch. Listen as they create. Speak as little as possible. And be open to seeing again anew. Do this everyday for a month. Then come see me."

Deep Equity started to walk away but stopped and turned back.

"And be careful in town. That's what prompted all this mess. Your numbness has impact."

With that Deep Equity smiled. "Have a nice day, now." And turned toward their house again with a walk so fervent yet light on the earth it seemed like the floating skip of a happy ghost. Free.

Think - Trio - Share

How does this story affirm or shift your idea of systems change?

Template by [Training for Change](#)
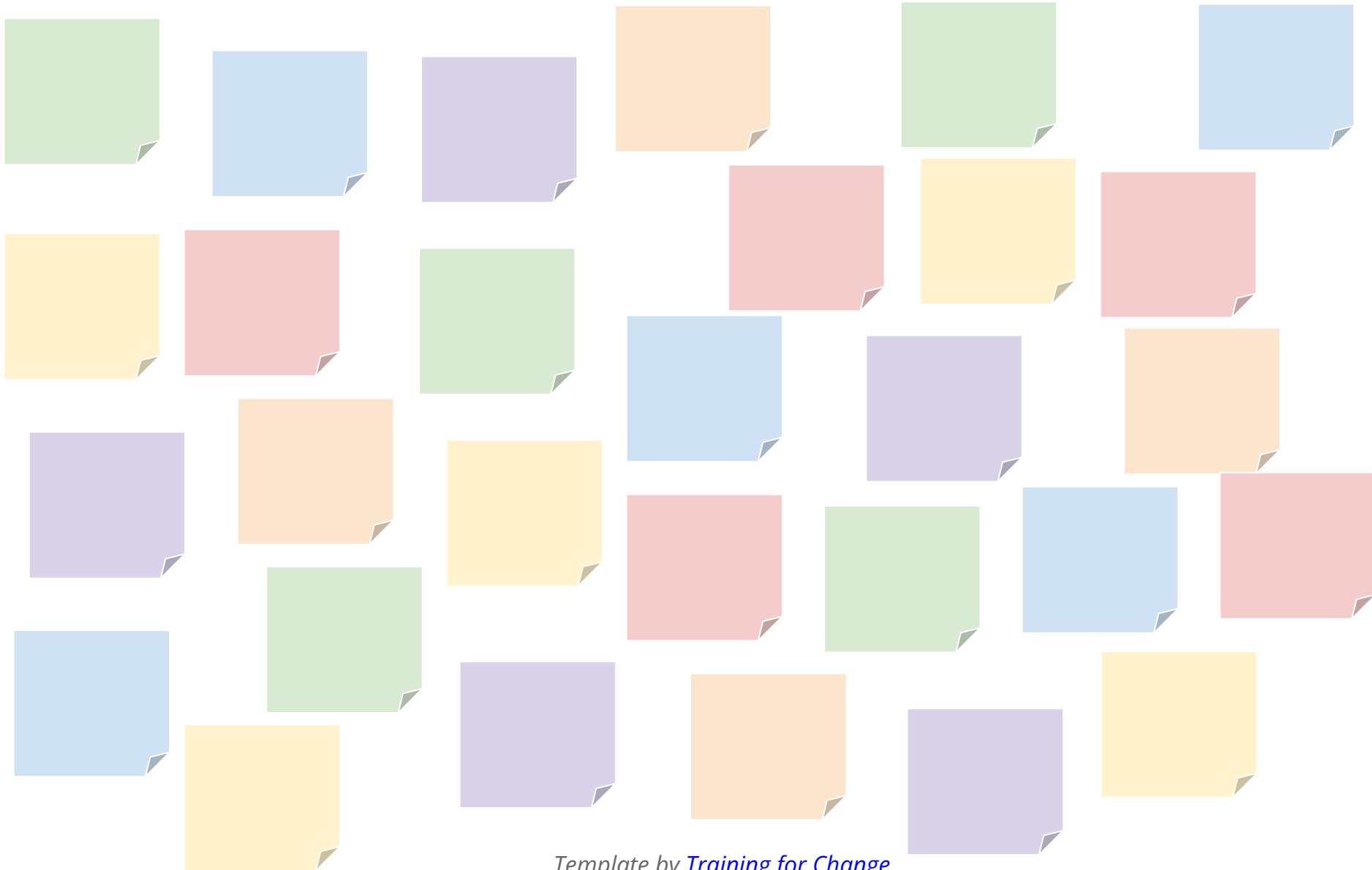
Take a 5 minute stretch break

Inside/Outside Strategies
How do we shift mental models

Spotlight on the Minnesota Healthy Partnership

- Charged with developing public health priorities, goals, objectives and strategies to improve the health of all Minnesotans and to ensure ownership of these in communities across the state of Minnesota.

- Broad membership includes advocacy, public health, state agencies (transportation, corrections), academics.

- Guides the state health assessment and health improvement plan.

  » Spotlight on: **Narratives and health equity: Expanding the Conversation**

Spotlight on the Minnesota Healthy Partnership

Strategic Approach Adopted (2013)

↓

Dominant vs. Emerging Health Narratives

↓

Core Narrative and Prioritized Topics

↓

Emerging Health Narratives

Spotlight on the Minnesota Healthy Partnership

Approach

- MDH (core cohort) trained in narratives
- Broad training for MDH and LPHA staff
- 2016-2018 trained over 1450 MDH staff, PH system partners, and community organizations
- Partnership members commit to advancing narratives through their networks

Example Narratives

- Income and Health
- Paid Family Leave
- Transportation
- Incarceration
- Burdensome debt

For more ideas or information:

https://www.health.state.mn.us/communities/practice/healthymnpartnership/narratives/index.html

Spotlight on the Minnesota Healthy Partnership

What were the conditions that allowed for this work?

- The will to learn and act from people on the Partnership

- Bringing the right people together
  - Partnership members and an external group of various BIPOC communities brought together for the core narrative
  - Sector specific engagement for each narrative topic (lived experience and sector decision–makers)

- Training and support
  - Grassroots Policy Project facilitation of meetings

- Commitment to implementation
  - Partnership staff developed skills for ongoing facilitation and use of narratives

Spotlight on the America Rescue Plan Act

- A significant opportunity for advancing health equity and implementing a systems change approach.
  - State and Local Fiscal Recovery Fund (SLFRF): $362B

- A significant opportunity to intentionally engage with and invest in Black, Indigenous, and People of Color (BIPOC) communities and populations who, because of deliberate governmental and institutional policy decisions, are regularly harmed by and disenfranchised from government budgeting processes.

Spotlight on the America Rescue Plan Act

HRiA will be supporting Massachusetts communities to:

- ○ Increase the power of BIPOC and other populations that are often excluded, to decide (not just provide input), thereby changing the culture of who can change conditions in communities.

- ○ Normalize actions that demonstrate how government can collaborate with residents who have been excluded.

- ○ Ensure that ARPA investments mitigate harm in social and physical environments, change systems that are not working for people, and limit any unintended negative consequences arising from ARPA investments.

Spotlight on the America Rescue Plan Act

HRiA's Approach

- **Who Benefits?**

Through our design decisions and actions, who will most directly benefit and how will they benefit?

- **Who Pays/Is Harmed?**

Will our approaches lead to any unintended consequences that can be mitigated?

- **Who Leads?**

Will our methods increase leadership opportunities for BIPOC communities and other disproportionately impacted communities?

- **Who Decides?**

In what ways can be we more transparent in how decisions get made? Will our actions create different ways of operating that place more choice in the hands of those with lived experience?

Inside/Outside Strategies: "Power-With"

Why

- Hierarchies (racial and other) work to maintain power and advantage and lead to the production of health inequity.
- The social forces that maintain hierarchies are entrenched and require pressure to change.

"This requires a strategy to build power, as a means to overcome the organized networks that shape laws, make meaning, and oppose social change"

Taking a Public Health Approach to Address Structural Racism and Mitigate Health Inequity by Lori Tremmel Freeman, MBA published in NACCHO EXCHANGE

Inside/Outside Strategies: "Power-With"

How

Inside

- Commitment to build collective understanding
- Commitment to act/take risks
- Leverage resources/share information
- Creation of structures and avenues for dialogue

Outside

- Organizing and mobilizing community voices to raise up community solutions
- Identifying internal change agents
- Applying pressure and cover

How Health Equity is Attained
Critique and Opportunities

How Health Equity is Attained

The PHAB's Health Equity Review Policy and Procedure says:

- Achieving health equity ==requires engagement and co-creation of policies, programs and decisions with the community== in order to ensure the equitable distribution of resources and power. This level of community engagement results in the elimination of gaps in health outcomes between and within different social groups.

- Health equity also ==requires that public health professionals look for solutions outside of the health care system, such as in the transportation, justice or housing sectors and through the distribution of power and resources==, to improve health with communities. By redirecting resources that further the damage caused by white supremacy and oppression into services and programs that uplift communities and repair past harms, equity can be achieved.

Where have you seen progress?

Where is there room for attention/ improvement?

Consider: Who comprises the PHAB? What perspectives are here? Who is missing?

Where have you seen progress?

-
-
-

Where is there room for improvement?

-
-
-

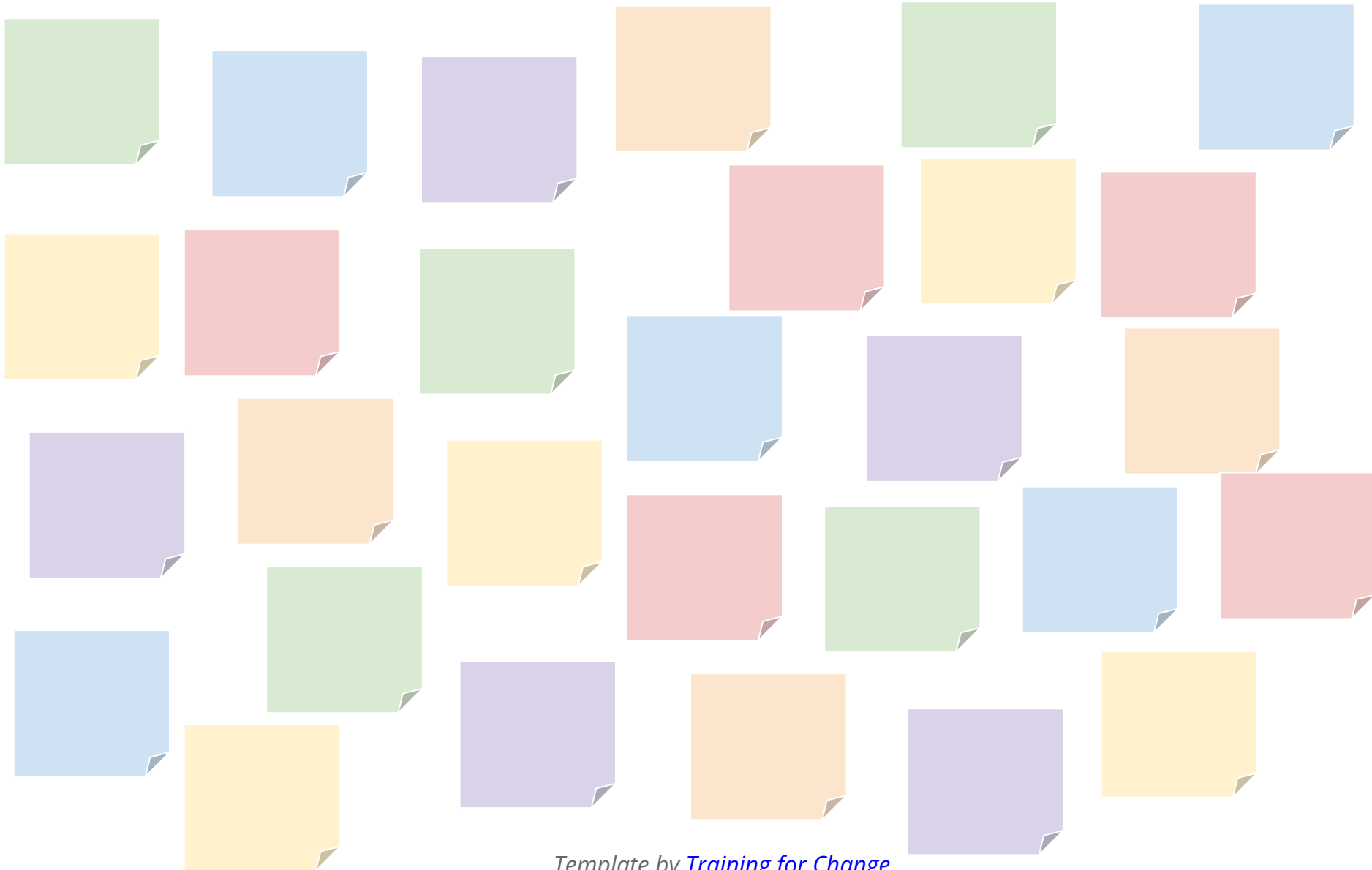*Template by <u>Training for Change</u>*

Think-Trio-Share

- For the PHAB, what needs to happen to embrace an Inside/Outside Strategy?
- What actions should come first?

Think - Trio - Share
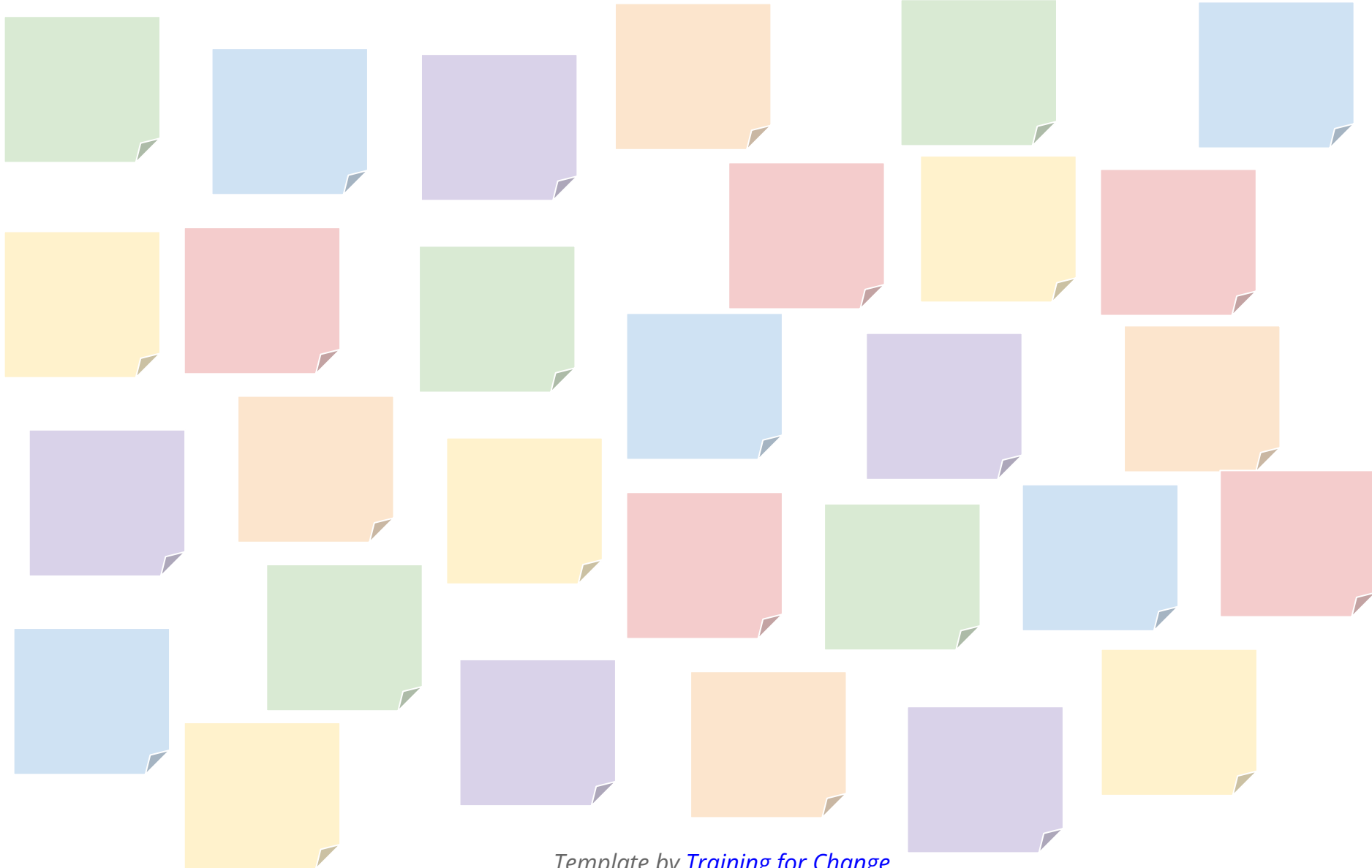
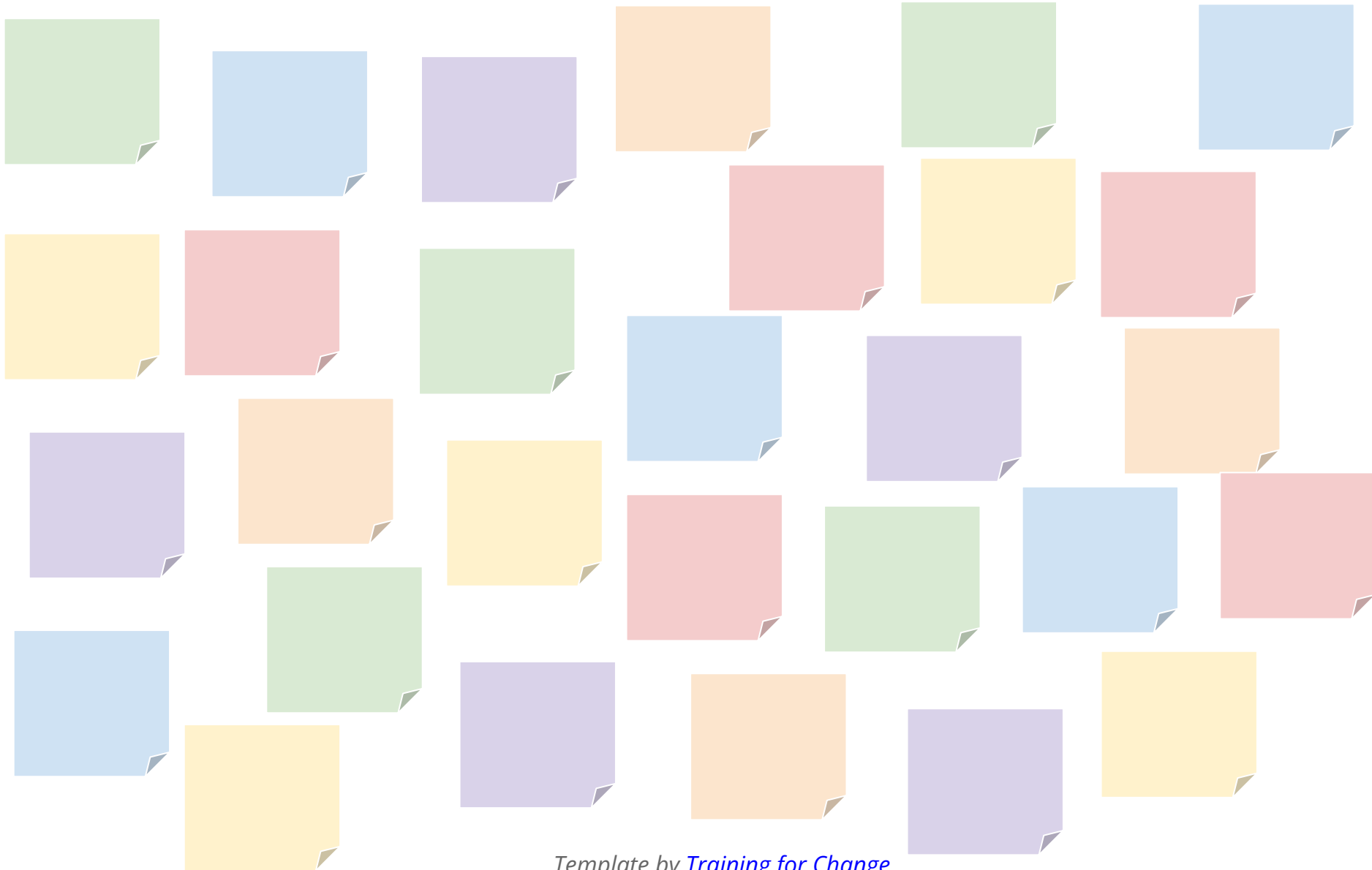*For the PHAB, what needs to happen to embrace an Inside/Outside Strategy?*

Template by [Training for Change](#)

Think - Trio - Share
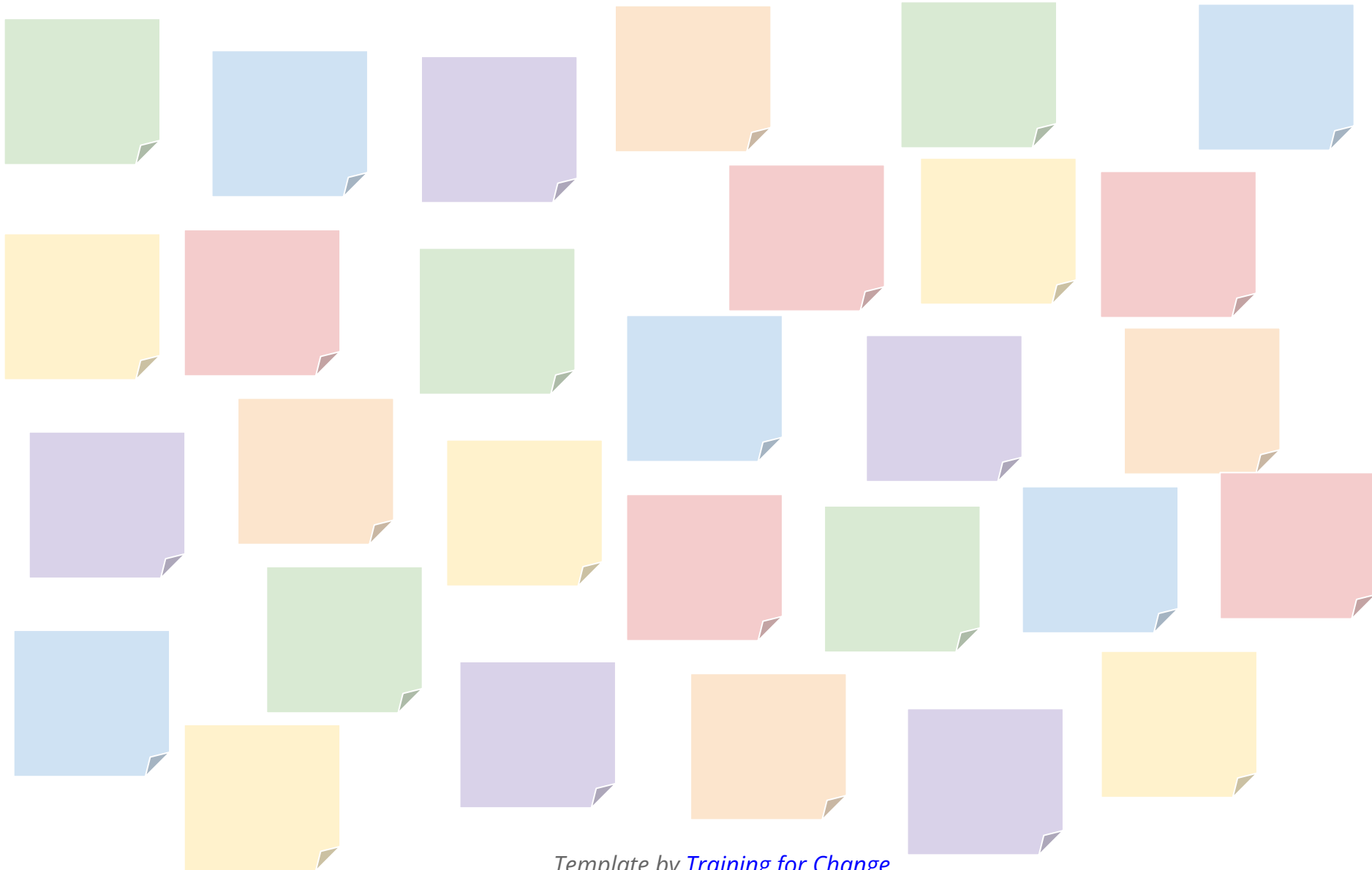
What actions should come first?

Feedback and Close

Key Takeaways

Key Takeaways

Thank you!

THE GROUNDWATER APPROACH:

building a practical understanding
of structural racism

written by BAYARD LOVE AND DEENA HAYES-GREENE OF THE RACIAL EQUITY INSTITUTE

INTRODUCTION

In an effort to help leaders, organizers, and organizations stay focused on the structural and cultural roots of racial inequity, we developed the "Groundwater" metaphor and accompanying analytical framework to explain the nature of racism as it currently exists in the United States.

In 2013, inspired by Dr. Camara Phyllis Jones's insights about the power of allegory to make complex concepts easily understandable, we came up with "the Groundwater" as a metaphor for structural racism. The simple analytical framework that supports the metaphor is equally important; we outline that framework in this piece. Why is it so important? We believe that effective solutions require accurate diagnoses, and that our collective understanding of why we have inequity is largely incomplete or altogether incorrect.

Any wisdom present here was developed over years of movement-building and anti-racist community organizing and includes the input of thousands of organizers, community members, and leaders from across the U.S. and beyond. All contributors are too numerous to mention here, but certainly none of this would exist if not for the leadership and mentorship of the People's Institute for Survival and Beyond based in New Orleans, LA; the Racial Equity Institute based in Greensboro, NC; the work of academics like sociologist Dr. Eduardo Bonilla-Silva and epidemiologist Dr. Camara Phyllis Jones; and the leadership of Joyce James and all of the team at the Texas Health and Human Services Center for the Elimination of Disproportionality and Disparities in the years following the Center's creation in 2010. The Groundwater metaphor was first presented by Joyce James and Bay Love in 2013. We have built on that foundation and encourage others to further the work from here.

Our metaphor is aligned with many who trace racial inequity to "structural racism," "structural racialization," or a "race-based caste system," but these are complex terms that can be hard to grasp. We hope the "Groundwater" metaphor helps makes the complex accessible and practical.
It's based on a simple tale of dying fish that goes like this:
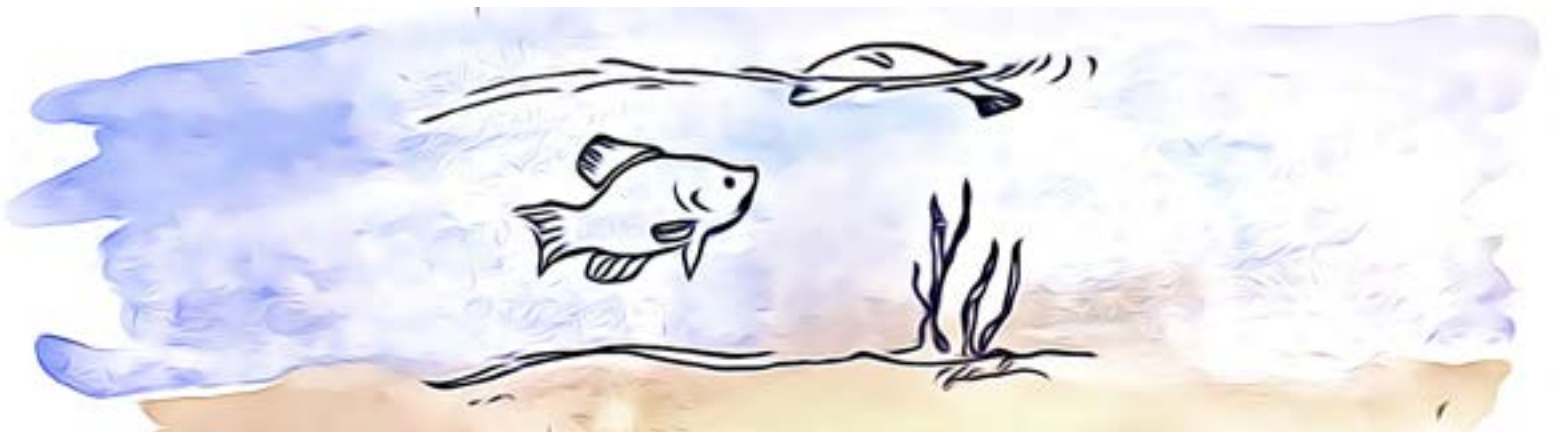
Artwork by Jojo Karlin (jojokarlin.com)

THE FISH, THE LAKE, AND THE GROUNDWATER

If you have a lake in front of your house and one fish is floating belly-up dead, it makes sense to analyze the fish. What is wrong with it? Imagine the fish is one student failing in the education system. We'd ask: Did it study hard enough? Is it getting the support it needs at home?

But if you come out to that same lake and *half* the fish are floating belly-up dead, what should you do? This time you've got to analyze the lake. Imagine the lake is the education system and *half* the students are failing. This time we'd ask: Might the system itself be causing such consistent, unacceptable outcomes for students? If so, how?

Now… picture five lakes around your house, and in *each and every* lake half the fish are floating belly-up dead! What is it time to do? We say it's time to analyze the groundwater. How did the water in all these lakes end up with the same contamination? On the surface the lakes don't appear to be connected, but it's possible—even likely—that they are. In fact, over 95% of the freshwater on the planet is *not* above ground where we can see it; it is below the surface in the groundwater.

This time we can imagine half the kids in a given region are failing in the education system, half the kids suffer from ill health, half are performing poorly in the criminal justice system, half are struggling in and out of the child welfare system, and it's often the same kids in each system!

By using a "groundwater" approach, one might begin to ask these questions: Why are educators creating the same racial inequity as doctors, police officers, and child welfare workers? How might our systems be connected? Most importantly, how do we use our position(s) in one system to impact a structural racial arrangement that might be deeper than any single system? To "fix fish" or clean up one lake at a time simply won't work—all we'd do is put "fixed" fish back into toxic water or filter a lake that is quickly recontaminated by the toxic groundwater. [1]

Our groundwater metaphor is designed to help practitioners at all levels internalize the reality that *we live in a racially structured society, and that that is what causes racial inequity*. The metaphor is based on three observations: racial inequity looks the same across systems, socio-economic difference does not explain the racial inequity; and inequities are caused by systems, regardless of people's culture or behavior. Embracing these truths forces leaders to confront the reality that all our systems, institutions, and outcomes emanate from the racial hierarchy on which the United States was built. In other words, we have a "groundwater" problem, and we need "groundwater" solutions.

RACIAL INEQUITY LOOKS THE SAME ACROSS SYSTEMS

Based on national data for African Americans and whites, we see consistent inequity in health care, education, law enforcement, child welfare, and finance, to name a few.

For example, according to data from the corresponding federal agencies:

African Americans are **2.3** times more likely to experience infant death (CDC).
African Americans are **1.9** times more likely to die of diabetes (CDC).
African Americans are **1.5** times more likely to be below "proficient" in reading in the 4th grade (NAEP).
African Americans are **3.7** times more likely to be suspended in K-12 (ED and OCR).
African Americans are **2.7** times more likely be searched on a traffic stop (BJS).
African Americans are **7.0** times more likely to be incarcerated as adults (BJS).
African Americans are **1.8** times more likely to be identified as victims by the child welfare system (DHHS).
African Americans are **2.1** times more likely to be in foster care (DHHS).
African American business owners are **5.2** times more likely to be denied a loan (SBA).
African American business owners are **1.7** times less likely to own a home (SBA).

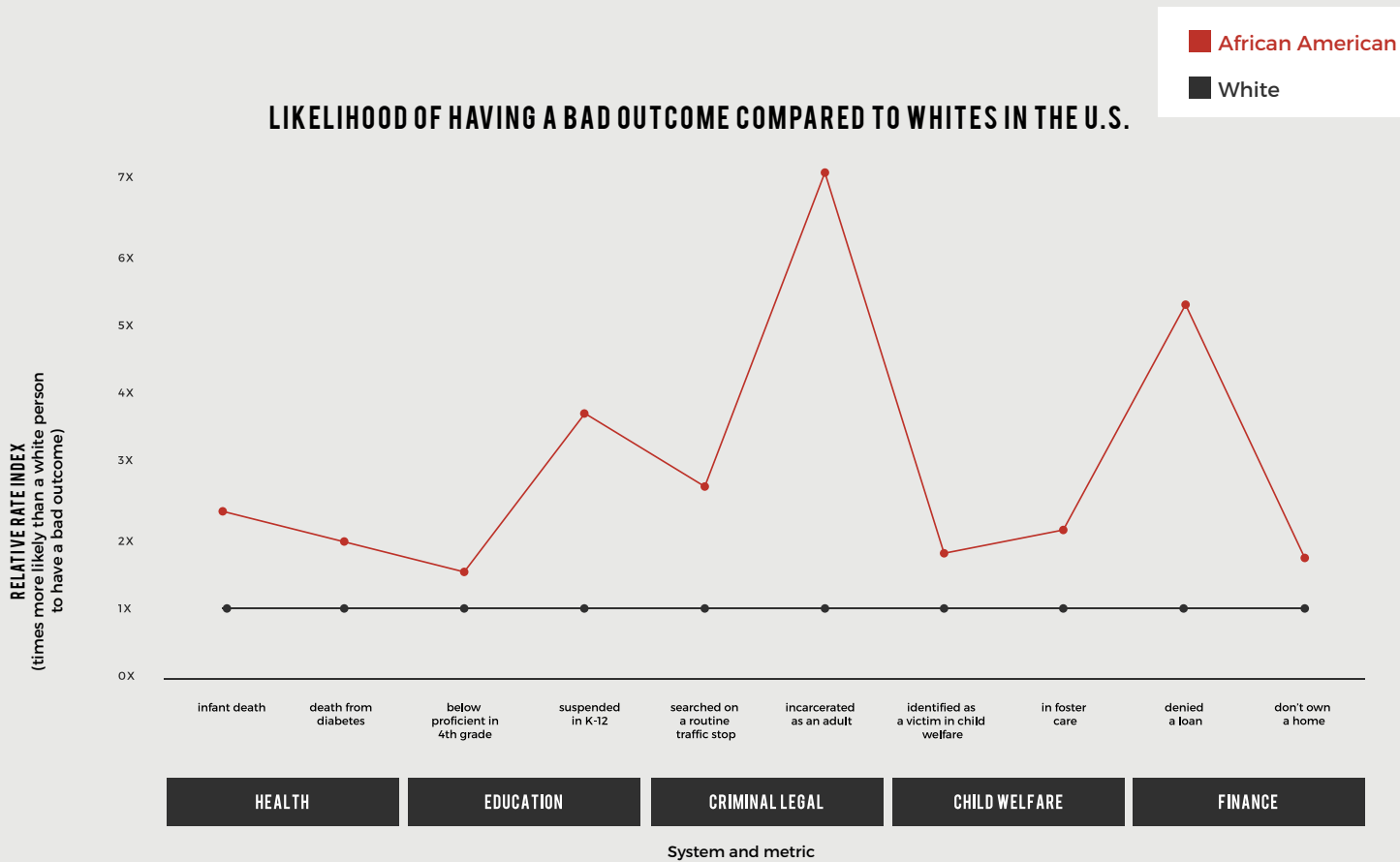A chart that shows results across systems using a relative rate index demonstrates the point. [2]

LIKELIHOOD OF HAVING A BAD OUTCOME COMPARED TO WHITES IN THE U.S.

Legend: ■ African American ■ White

RELATIVE RATE INDEX (times more likely than a white person to have a bad outcome)

Categories: infant death, death from diabetes, below proficient in 4th grade, suspended in K-12, searched on a routine traffic stop, incarcerated as an adult, identified as a victim in child welfare, in foster care, denied a loan, don't own a home

Systems: HEALTH | EDUCATION | CRIMINAL LEGAL | CHILD WELFARE | FINANCE

System and metric

Figure 1: "African Americans are 1.5 to 7 times as likely to have a bad outcome across systems" (sources in text on page 6).

PERCENT LIKELIHOOD OF HAVING A BAD OUTCOME COMPARED TO AFRICAN AMERICANS IN THE U.S.

RELATIVE RATE INDEX (percent likelihood of having bad outcome relative to African Americans)

Categories: infant death, death from diabetes, below proficient in 4th grade, suspended in K-12, searched on a routine traffic stop, incarcerated as an adult, identified as a victim in child welfare, in foster care, denied a loan, don't own a home

Systems: HEALTH | EDUCATION | CRIMINAL LEGAL | CHILD WELFARE | FINANCE
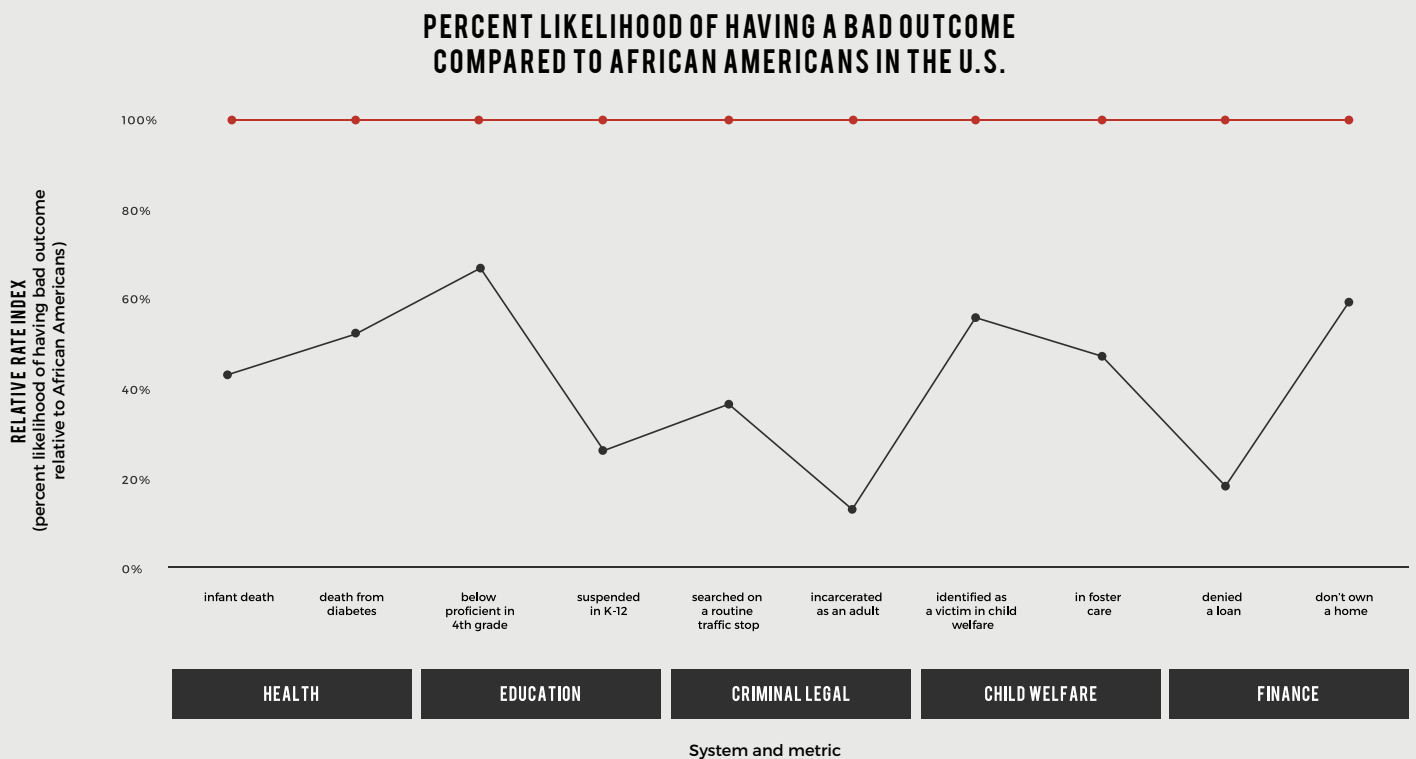
System and metric

Figure 2: The same data arranged with whites as the reference group demonstrates the same point with a different frame: "Whites are only ~15%-~65% as likely to have a bad outcome across systems" (sources in text on page 6).

Race-conscious leaders could list a plethora of additional examples. ***In practice, though, even outspoken proponents of equity seldom consider all of them simultaneously.*** This is a problem.

If the United States solved the achievement gap, for example, but did not address the groundwater of structural racism, the achievement gap would literally re-emerge over time. Inequity in other systems (lakes) would spread through the groundwater and recreate inequity in education. If a child's grandparent is twice as likely to die of diabetes, that will have a financial and emotional impact on the whole family, which will impact the child's performance in school. If a child's parent is less likely to get a job offer that they are equally qualified for, that means less wealth for the family, which will impact the child's educational outcomes. These impacts across systems flow in all directions, just as water flows between lakes in the groundwater. Effective change, therefore, must be rooted in an understanding of structural racism; it must utilize a groundwater approach.

That whites fare best in every system across the country usually elicits two questions:
1. since whites are wealthier on average, how do we know socio-economic difference or differential access isn't the root?
2. and since we know behavior and culture impact institutional outcomes, how do we know that differences in culture and behavior don't explain the gaps?

We find it important to debunk these all-too-common explanations for inequity immediately after showing the inequity that exists. ***To show that there is inequity but not why there is inequity leaves too much open to interpretation.*** The next two observations in our approach begin to address why there is inequity.

SOCIO-ECONOMIC DIFFERENCE DOES NOT EXPLAIN THE RACIAL INEQUITY

If socio-economic difference explained the racial inequity, controlling for socio-economic status would eliminate it; it does not. Scholars and practitioners have demonstrated this over and over across multiple systems. Here are three examples:

1) The most recent CDC data show racial disparity in infant mortality, even when we compare black and white mothers with the same level of education. In fact, white women with a high school diploma or a GED have lower infant mortality rates than black women with MAs, JDs or PhD's.

2) In 2009, McKinsey & Company completed a comprehensive analysis of U.S. achievement gaps in K-12 education and found that "while independent racial and income gaps exist, black and Latino students underperform white students at each income level." In 2016, Stanford University sociologist Sean Reardon used the Stanford Education Data Archive to analyze the impact of district-level socioeconomic status, family-level socioeconomic status, and racial identification on

student achievement and found that "Racial/ethnic disparities in academic performance are large, both overall and within individual school districts... [and] even in places where white and black or white and Hispanic students come from families with the same socioeconomic characteristics, racial/ethnic achievement gaps are present, and substantial."

3) In 2016, Duke University economist William Darity, Jr., looked at the impact of race and wealth on incarceration and found that "racial incarceration disparities persist even for individuals with similarly situated family wealth positions." The study found, in fact, that over the longer term (27 years), white men in the poorest wealth deciles were less likely to be incarcerated than black men in the wealthiest deciles.

What makes this point starker is that in today's economy (even excluding the impacts of multi-generational wealth), one's racial designation is actually a causative factor in one's socioeconomic status. One clear and relatively well-known example is the study completed by researchers at NBER, Harvard, and the University of Chicago. Researchers sent out 5,000 resumes that were identical, except that half had "black-sounding" names and half had "white-sounding" names. "White" resumes were ~1.5 times as likely to get a call-back compared to otherwise identical "black" resumes. A recent meta-analysis shows these disparities actually increased between 1990 and 2015. Socioeconomic status cannot explain persistent racial inequity in the U.S.; on the contrary, racism further exacerbates existing gaps.

INEQUITIES ARE CAUSED BY SYSTEMS, REGARDLESS OF CULTURE OR BEHAVIOR

Using new methodologies, researchers have generated more and more evidence that systems cause the inequity regardless of people's behavior or culture. This is a critical point, given the common narratives that inequities are explained by cultural or behavioral differences. Here are three examples:

1) In its landmark 2002 study, "Unequal Treatment," the Institute of Medicine (IOM) found that "research indicates that minorities are less likely than whites to receive needed services, including clinically necessary procedures, even after correcting for access-related factors, such as insurance status" and that "health care providers' diagnostic and treatment decisions, as well as their feelings about patients, are influenced by patients' race or ethnicity and stereotypes associated with them." The IOM report references a number of peer-reviewed studies that control for patient history, symptomology, and demeanor to show that race alone has an impact on treatment. Research since 2002 has corroborated IOM's findings.

2) Similarly, banking and lending institutions provide an advantage for whites even when controlling for credit score and financial history. In a new study from 2018, The Center for

Investigative Reporting found that "African Americans and Latinos continue to be routinely denied conventional mortgage loans at rates far higher than their white counterparts. This modern-day redlining persisted in 61 metro areas even when controlling for applicants' income, loan amount, and neighborhood, according to a mountain of Home Mortgage Disclosure Act records analyzed." It is simply inaccurate to suggest that whites fare better in the world of finance and wealth because of certain behaviors or cultural characteristics regarding saving, spending, and investing.

3) In their 2015 study of education and discipline, Stanford psychologists Jennifer Eberhardt and Jason Okonofua presented teachers with written vignettes of student misbehavior. The vignettes were identical except that half had "black-sounding" names and half had "white-sounding" names. Teachers of all races said that (fictitious) students with black-sounding names were more disruptive, more likely to be repeat offenders, and more appropriately labelled as "troublemakers."

These studies represent a small sample of many. Racial inequity cannot be explained by behavioral or cultural differences between racial groups. On the contrary, *systems and systems representatives treat people differently based on race regardless of their culture and regardless of how people behave.*

IT'S IN THE GROUNDWATER

Taken together, we think these observations point to the sobering reality of structural racism in the United States. Clients and communities across the country are finding the groundwater metaphor to be useful in re-framing and re-focusing their work, leading to new partnerships and exciting new openings for action.

One mid-sized urban school district began to use a groundwater approach and was quickly drawn to establishing unprecedented cross-systems partnerships with law enforcement, civil rights leadership, and economic developers, among others. Most leaders agree that this kind of collaboration is necessary to address complex social problems; a groundwater analysis makes that possible.

In another region, the groundwater approach took hold through a set of smaller initiatives that were initially completely disconnected. Those initiatives started in churches, academic institutions, community organizations, and government, and are now connecting through the analysis and growing into a web of aligned stakeholders. Previously, epidemiologists felt their work was only tangentially related to economic development; now epidemiological data is being combined with economic development data to demonstrate a structural reality that people can work together to dismantle. New analysis is building unity and helping to drive electoral victories, policy changes, new leadership development, and unprecedented collaborations across the region.

We're encouraged by the work that is being done across this and other countries and continents. As we continue to expand our movements, let's keep deepening them too.

NOTES:

[1] The challenge of seeing the structure is exacerbated by the way we talk about inequity. Every system has racial inequity but uses a different term for it. In child welfare, for example, a prominent term to describe racial inequity is "disproportionality;" in healthcare, "health disparities;" in education, "achievement gap;" in criminal justice, "disparate sentencing" or "disproportionate minority contact." In economic development, racial inequity might be described as underutilization of "minority business enterprises," signaled though terms like "inclusive innovation" (which would be necessary only because of existing exclusion). By using different language for different manifestations of racial inequity, we have made it difficult to consider that they may be various manifestations of a single structural phenomenon that we call structural racism.

[2] We choose to use a line chart to demonstrate the data, even though it does not represent a series of data over time, because it can help viewers imagine the interconnectedness of the outcomes. Some clients and colleagues prefer to use a bar chart, which works as well.

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Suggested Citation: Hayes-Greene, Deena, and Bayard P. Love. *The Groundwater Approach: Building a Practical Understanding of Structural Racism.* The Racial Equity Institute. 2018.

Please visit www.racialequityinstitute.org for more information on our work, the metaphor, and examples of the Groundwater approach applied.

SYSTEMS CHANGE & DEEP EQUITY:

Pathways Toward Sustainable Impact, Beyond "Eureka!," Unawareness & Unwitting Harm

An Interview with Sheryl Petty and Mark Leach

CHANGE ELEMENTAL
Co-Creating Power for Love, Dignity, and Justice

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CHANGE ELEMENTAL
Co-Creating Power for Love, Dignity, and Justice

INTRODUCTION

Change Elemental chose to offer a monograph to share our thoughts on the inseparability of Systems Change and Deep Equity, given our 40 years as an organization in the systems change, capacity building, and social justice fields.[1] We offer this especially given the proliferation of equity awareness and **significantly deeper requests for equity support** across the organizational development and movement network fields in the last few years. This expansion in requests for deep, transformational equity support has grown dramatically since the 2016 U.S. presidential election. Now, many more social change organizations and philanthropic institutions are working to deepen their knowledge and capacity around Systems Change and Deep Equity. In our opinion, the combination of these two fields is pivotal and likely the work to do for the next phase of our human evolution if we are to become the societies we hope for in our deepest hearts and visions for just and healthy communities.

The co-authors of this article have 65 years of combined experience in systems change, equity, and organizational transformation. We have worked together on a number of projects for nearly 8 years, sometimes separately and, at times, together in local, national, and international spaces. We have worked across foundations, non-profits, medium-to-large school systems and universities as well as with individuals, institutions, and networks to support leaders, change agents, and groups to deepen their capacity to realize the full potential of their missions and collective dreams. We have observed over the last decade or so in the field of organizational development, the more popular advent of "Systems Change" as a domain of effort that can lead to more comprehensive, lasting, and effective transformation for institutions, communities, neighborhoods, and groups.

Yet, our observation is also that these approaches to "complex systems" are new to some and not so new to others. Here enters "equity." We have written elsewhere on the dimensions of equity, and refer readers to those pieces.[2] Others of our colleagues have also written extensively across the fields of social justice, organizational transformation, network development, and movement building.[3]

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[1] Change Elemental was formerly known as Management Assistance Group (MAG). We changed our name in April 2019.

[2] For example: Petty, Sheryl. *Seeing, Reckoning and Acting: A Practice Toward Deep Equity*. Change Elemental, 2016. https://changeelemental.org/resources/seeing-reckoning-acting-a-practice-toward-deep-equity/; and Petty, Sheryl and Amy B. Dean. *Pursuing Deep Equity*. Nonprofit Quarterly, 2017. https://nonprofitquarterly.org/five-elements-of-a-thriving-justice-ecosystem-pursuing-deep-equity/

[3] Please see more resources listed in the appendix.

Our purpose in this article is to **dispel mythology and to illuminate essential dimensions of approaches to Systems Change intimately connected with Deep Equity.** Our perspectives and our experience have shown us that *the two are inseparable if they are to be pursued at depth.* The degree of healing needed in our world, and in our collective institutions and communities, requires nothing less than *depth* from us at this time (if less comprehensive approaches were ever appropriate).

We indicate in this monograph what, from our perspective, are the most salient aspects of approaches to Systems Change and Deep Equity **combined** that can lead and, in our experience, have led to the most profound changes in organizations, local, national, and global communities, networks, and movement building efforts. (We also refer readers to Change Elemental and Building Movement Project's 2018 webinar on Systems Change and Equity for further grounding in our approaches.[4])

As we have stated, nothing less than the robustness of complex Systems Change approaches are necessary to solve some of the most intractable situations we are and have been facing for quite some time—socially, environmentally, and economically, in terms of the overall health and well-being of individuals and communities, nationally and globally. We have grown as a species in our ability to be aware of the *interconnectedness* between so many of our issues and circumstances; this insight is a gift. We are now challenged to take that growth and insight, and apply it at depth *with particular **attention to our areas of unawareness**—i.e., the places we have been ignoring for centuries.* It is to these areas that Deep Equity speaks. In fact, *Deep Equity, by its very nature, **is** complex Systems Change.*

To put a finer point on these statements: **Systems Change pursued without Deep Equity is, in our experience, *dangerous* and *can cause harm, and in fact leaves some of the critical elements of systems unchanged.* And "equity" pursued without "Systems Change" is *not "deep" nor comprehensive* at the level of effectiveness currently needed.**

Both need each other. The **challenge in effectively combining these domains of practice** is that often many systems change actors—*particularly those with access to publishing, funding, and other critical resources to achieve depth and scale*—do not seem to understand nor are they embedding Deep Equity into their work. Or when "equity" is addressed, it is piecemeal, seems an afterthought, and/or is shallow. Actors pursuing and advancing critically needed systems change efforts often bring limited awareness to address or adequately embed equity. This is the wound we must heal.

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[4] *Systems Change with an Equity Lens: Community Interventions that Shift Power and Center Race.* Change Elemental and Building Movement Project, 2018. https://changeelemental.org/resources/systems-change-with-an-equity-lens-community-interventions-that-shift-power-and-center-race/

We have observed too many times systems change efforts pursued to the neglect of equity, or Deep Equity, despite living in a period where information about equity (and *Deep* Equity, in particular) is proliferating at an unprecedented rate. Gone are the times when any of us could say, "I couldn't find any information on it," "I didn't know anyone," or "I didn't know better."

We owe it to ourselves and to each other to confront our old habits that are preventing us from creating the most robust, healing, catalytic, life-affirming, and transformative solutions we can develop, and that are desperately needed. Pursuing Deep Equity and Systems Change will require us to **squarely address** issues of power, privilege, places of unawareness, and the meaning of "depth" in approaches to equity and systems change. It will take bravery and courage, finding out how deep we are really willing to go to help heal and transform this world, committing to the depth that we discover in our exploration, and partnering and complementing each other in ways that may be heretofore unprecedented.[5] (We also refer the reader to a previously published piece from one of the authors on the relationship between these two themes plus "inner work:" "*Waking Up To All of Ourselves: Inner Work, Social Justice & Systems Change.*"[6])

This monograph is structured as an **interview of Sheryl Petty conducted by Mark Leach, but it is ultimately a dialogue** between two long-term Systems Change and Equity actors.

One of us is a soon-to-be middle-aged cisgendered,[7] queer/pansexual, Black woman from Detroit, whose professional career in social justice and Systems Change began in Oakland, CA in educational systems and nonprofits, and branched out into capacity building and systems change with school systems, nonprofits, and philanthropic institutions around the country over the last 25 years. She also has a nearly 25-year inner work practice in African-based and Tibetan Buddhist traditions, in both of which she is ordained and teaches.

The other of us is a well-past middle-aged, cisgendered, white man from Long Island, New York. Based on early experiences in some of the world's most economically poor countries, he has spent his life trying to understand who gets what, and why, and working with people, organizations, and networks across big differences in identity, wealth, and worldview to tackle big, messy problems of systemic inequity.

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[5] Petty, Sheryl. "Introduction." *Equity-Centered Capacity Building: Essential Approaches for Excellence and Sustainable School System Transformation.* Equity-Centered Capacity Building Network (ECCBN), 2016. https://capacitybuildingnetwork.org/intro/

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HOW TO READ THIS MONOGRAPH

Here we share a few notes on our choices in this monograph to guide readers and offer friendly advice in your journey with it:

1. We intentionally structured the monograph more like **jazz music** (rather than a linear-sequential treatise) to give greater allegiance to equity sensibilities and multi-identitied communities who have multiple ways of communicating, expressing, experiencing, and making sense of the world.

    a. We hope to both meet readers where they are *and* to take them on a familiar and sometimes unfamiliar journey of growth and expansion. Hence, we are both trying to *meet* as well as move beyond white dominant habits.[8]

    b. Some of the *content* may be unfamiliar, as well as some of the presentation and modes of expression. Aspects of jazz include:

        i. An initial statement of a melody, which establishes the structure of the piece and orients the listener. (*We include this introduction, occasional tables, and a flow of topics to orient the reader.*)
        ii. No one will know what it will sound like; jazz may include a sax solo or a key change. (*There will be connections you're not expecting, as well as potentially unexpected shifts in direction, following the dialogue format.*)
        iii. It's not composed through. Jazz intros often lay out the fundamental aspects of a piece, but the rest is improvisation that builds and riffs on the initial melody, structure, and chords. (*We allowed the style of writing and dialogue to be emergent.*)

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[8] *White Dominant Culture and Something Different.* Adapted from Tema Okun and Kenneth Jones. https://www.cacgrants.org/assets/ce/Documents/2019/WhiteDominantCulture.pdf

c. If this style of writing is new to you or you are unfamiliar with **multiple ways of knowing and expressing,**[9] our advice is to *be patient*. The exercise of reading in a new and unfamiliar structure *is an experience of deepening Equity capacity itself*, and can be helpfully humbling (if we are open to it). We invite readers to *notice and work with* any discomfort you may experience (as opposed to getting frustrated and critiquing the writing style). This is an opportunity to learn and lean more deeply into equity through experiencing multiple ways of expressing. We invite you to buckle in for the ride or settle down into a comfortable chair, (perhaps with a highlighter and/or pen to take notes!)…

2. We have a few **audiences** for this piece (*in this order*):

a. **Seasoned Systems Change actors** who may or may not be utilizing aspects of equity[10] (or narrower "diversity" and "inclusion" principles) in their work. For you, this article will hopefully deepen your Equity capacity, learner-stance, and ability to partner in authentic multi-racial, multi-identitied Systems Change efforts.[11] Part of this article may be challenging and we invite you to experience it in the spirit of our shared humanity, endeavoring to ensure *depth* in our collective Systems Change efforts, which—in order to *not* do harm—must embed Deep Equity.

b. **Newer Systems Change actors** who are seeking to develop Equity capacity to ensure depth, no or limited harm, and sustainable benefit in their work toward our collective human and planetary health and thriving.

c. Our **Allies** who are already Deep Equity and social justice practitioners in multi-identitied spaces. We hope this article helps to give validation to your approaches, provides a resource for speaking with your colleagues in white-dominant environments, and that we haven't gotten much wrong! (And if we have, that you will be in dialogue with us in a generous, loving spirit of co-creation and growth!).

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[9] Sloan Perry, Elissa and Aja Couchois Duncan. *Multiple Ways Of Knowing: Expanding How We Know*. Nonprofit Quarterly, 2017. https://nonprofitquarterly.org/multiple-ways-knowing-expanding-know/
[10] Note that in this article, we will focus particularly on race given its primacy in the U.S. as well as the global wielding of "whiteness" in colonization patterns, while using an intersectional lens – i.e., the intersection of race along with other dimensions of identity, including gender, socioeconomics, age, language/dialect, LGBTQ identity, geography, immigration status, religion, etc.
[11] Although currently small in number, we greatly appreciate the intentions and contributions of Systems Change actors who have undertaken the journey of awakening around Equity and bringing that awareness into their tools and processes.

3. Sometimes our **tone** will deliberately be <u>very</u> direct and strident ("calling out"), and sometimes we will be more gentle and collaborative ("calling in"). It depends on what seems called for in the moment and what arose in the course of our long-time dialogue about these issues. All of our choices are in love and appreciation for the work and honest efforts people have been undertaking for decades; our choices are also in acknowledgement that Systems Change efforts *without* Deep Equity embedded are *harmful*, and sometimes we have to be strident and direct to prevent further or deeper injury. We hold everyone in compassion always, no matter what. This "holding" may be gentle or it may be firm, but it is always lovingly accountable.

MONOGRAPH RHYTHM

The principle comments in this monograph take the form of a dialogue, which flows in four sections loosely separated according to the **multiple levels** that are part of how Deep Equity is pursued (and that we, like others, also use in our work). These levels—and sections—are:

- SECTION 1: The **Individual** Level of Deep Equity and Systems Change
- SECTION 2: The **Interpersonal** Level of Deep Equity and Systems Change
- SECTION 3: The **Institutional** Level of Deep Equity and Systems Change
- SECTION 4: The **Systemic/Societal** Level of Deep Equity and Systems Change

Our perspective in this article is that Systems Change practitioners will need to engage at all of these levels to advance lasting change that can actually bring about healing, justice, and deep transformation in our communities and social systems.

Within each of these levels, we consider the following:

- **The Basic Tenets of Complex Systems Change**, *which refers to some of the most prominent theories and practices in the field with limited or absent Deep Equity,*
- **Impediments to Deep Equity** *within and across these tenets and levels, and*
- **Pathways Forward** *for each level.*

We conclude the piece with:

- **Final Reflections**, and
- **A Final Table** which summarizes the Tenets of Systems Change, Impediments to Deep Equity, and Pathways Forward across each level.

A final word before we begin: We would like to recognize and thank all those whose work we are building on and connecting to. This includes people—both publicly known and whose names may never be known beyond their own communities—who have been practicing, embodying, and living Deep Equity before it was labeled this way. We also want to acknowledge the well-known Systems Change thinkers and actors, and the value and contributions of their work. We also want to challenge, agitate, and invite our colleagues in the Systems Change field into deeper understanding of Deep Equity and the possibility of greater values-aligned impact (as well as decreased harm) if such approaches, principles, and humility become inextricably embedded in all of our work.

We hope this article helps to advance the field and our collective efforts for liberation, joy, and healing. Welcome!...

AN ECOSYSTEM OF JUSTICE: HOW NEIGHBORS CAN BE

A Poem Story by Elissa Sloan Perry

Change Elemental CoDirector

Complex Systems Change was sitting. In a chair. At a desk. Looking. At data. Asking questions. Forming so called "liberating structures" that, as is, only liberate those he can see. In ways he can see. With feedback loops so meticulously considered they were a thing of beauty to him. Created so systems can learn and leaders can learn. To be adaptive.

He'd proclaimed this in a conference presentation. He did have good intentions.

His neighbor, Deep Equity, grew concerned. Complex Systems Change was maybe not Deep Equity's best friend, but Complex Systems was their[12] neighbor and Deep Equity cared about how pale and cut off Complex Systems was getting.

They[13] knocked on Complex Systems' door.

"I think you might be having heart problems." They said to him. "You are pale and move about the world as if your limbs are numb. Artist and Healer say you are always knocking into people, knocking things over. Breaking them. When you come to the central marketplace."

"I'm not saying I'm perfect," Deep Equity said with a chuckle and a raised eyebrow. "People like to think I'm a noun but really I'm a verb. A constant work in progress. But this liberating heart is full in body to embody. I feel all the rough bark, soft moss, sap that runs when I'm glad to see you. It tells me things – this body – asks me questions."

> *"The kick in the chest of 'Just what the hell do you think you are doing?' Or. The dropping of center to root chakra of 'Yeah, you know this is right, right?'"*

"This heart knows joy, and rage and terror and despair. They all flow freely and connect. Tears to body. Energy flowing. Source. And Back again. All the way to Story. The simultaneity of it all. Our stories hold it all. Indeed art may be the only thing that can."

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[12] Deep Equity's
[13] Deep Equity

"So maybe I got something can start to work on your innards. Get the flow going. Get you some knowing that comes from feeling your limbs, your body, your heart. Hell, just feeling period."

Well Complex Systems, you could've knocked him over with a feather. He felt plenty in that moment. He went from angry to fearful to ashamed to just floating in a matter of seconds as he stared at Deep Equity. Mouth agape.

He had gotten used to not feeling, and this? This was making him a foal on new born legs.

"Now looks like you got a jumpstart today, but I ain't the one. At least not yet."

They had been neighbors for as long as CompSy, (as Deep Equity sometimes called him – their family did nicknames. Sometimes it sounded like "come see") – could remember.

Deep E on the other hand, knew exactly when CompSy's family moved in 60 years ago. Deep E's family had told them the whole story.

But they'd only really started talking. Shared some meals when the frackers tried to buy everything up 8 years ago.

And then there were the fires followed by the floods last year. Deep E's old fishing boat and CompSy's REI survival packs, together had saved them and their families both.

"You need to start close in. Give your heart messages. Massages. Be with your partner, the Painter. Your child, the Musician. Just be with them. Watch. Listen as they create. Speak as little as possible. And be open to seeing again anew. Do this everyday for a month. Then come see me."

Deep Equity started to walk away but stopped and turned back.

"And be careful in town. That's what prompted all this mess. Your numbness has impact."

With that Deep Equity smiled. "Have a nice day, now." And turned toward their house again with a walk so fervent yet light on the earth it seemed like the floating skip of a happy ghost. Free.

REFLECTION

Take a moment to pause and reflect on this story. Maybe even jot a few things down or draw a picture in the open space below. Here are a few questions to consider (not necessarily in this order):

1. *What were your impressions of this story?*
2. *How did it impact you? What are you feeling now?*
3. *How might it connect with your work and ways of being in the systems change and equity fields?*
4. *Other reflections?*

We share the above **story** to illustrate the different ways of being, seeing, thinking, feeling, and knowing that we are seeking to bring together through the combination of Deep Equity and Complex Systems Change. As we have noted, Deep Equity *is in fact* Complex Systems Change, but the reverse is not always true in practice, in our experience. It is to this dilemma that we turn in the bulk of this article…

AN INTERVIEW WITH SHERYL PETTY AND MARK LEACH

Guiding Questions for the Interview

1. *What's so important about the intersection of "Deep Equity" and "Systems Change"? What difference can attending to this intersection make? What is the value of an article on this at this time?*

2. *What are some of the most common pitfalls we've seen in the field related to attention to the presence or absence of the intersection of Equity and Systems Change?*

3. *What are some Pathways Forward in addressing those typical areas of Equity unawareness in Systems Change efforts?*

We have been having the conversation we are about to jump into for years. Let's talk for a moment about **why we decided to share this now**. There are several reasons that stand out for us: 1) In the current political and social moment, the word "equity" is being used by many people to mean many things, and sometimes the equity analysis and stance is not deep enough to get to root causes; 2) The fields of systems change, complexity, and related areas have been mainstreamed among capacity building folks and consultants, and have generally lacked *any* equity analysis, let alone a Deep Equity analysis; and 3) We want to help shape how many people engage in these two (often separate) fields of equity and systems change, and think about each field and the intersection of the two, because not doing so will NOT get us to either Deep Equity OR Systems Change, and as a result we will continue to miss important opportunities, at best, and do real harm, at worst.

Levels of Deep Equity Work	Current Tenets of Systems Change With a Limited or Absent Equity Understanding & Practice[14]
Individual	At the **Individual Level, Systems Change** requires: 1. **Expansive Perspective Taking:** Ability to see perspectives other than that of oneself or one's immediate group; and being mentally, emotionally, and practically open to engaging in part of an interconnected whole. 2. **Mental Model Agility:** Awareness and ability to change one's mental images of how a problem is defined and what solutions may exist. 3. **Specialized Tools to Perceive Systems:** Specialized analytic tools and methods are needed to make the "imperceivable" parts of systems perceivable.
Interpersonal	At the **Interpersonal Level, Systems Change** requires: 4. Social Network Building 5. Quality of Presence and Listening
Institutional	At the **Institutional Level, Systems Change** requires: 6. Diverse and Inclusive Institutions 7. Shared and Distributed Leadership
Systemic/ Societal	At the **Societal Level, Systems Change** requires: 8. Engaging Key Stakeholders 9. Shared View of Current Reality and System Dynamics 10. Shared View of Desired/Emerging Future 11. Experiments in the Direction of Shared Future 12. Transformation of the Nature and Quality of Awareness, Listening, and Consciousness

[14] These tenets _are already embedded in Deep Equity approaches_. Many are more recent discoveries in systems change circles and are often practiced with a limited or absent equity perspective. So, we end up with the same (or similar) _labels_ with vastly different _applications/uses_. In compiling the Systems Change concepts paraphrased or referred to in this piece, we considered whether to acknowledge by name the original sources we used for inspiration. We decided against naming individual practitioners and theorists. Our intent is to generate field-level dialogue and equity-informed change about ideas and approaches that have become widely used in the systems change world, rather than to directly credit or call in/out individuals whose ideas and practices have (from our view and that of many of our colleagues) lacked a deep equity perspective.

SECTION 1:
The INDIVIDUAL Level of Deep Equity and Systems Change

Mark: In the introduction to this article, we have laid out the basic rhythm and flow of how the dialogue will unfold, so take a look now if you haven't already. We are going to begin at the **INDIVIDUAL level of Deep Equity work.** I want to discuss *three tenets* which are prevalent in the field of systems change, but are not being theorized about or practiced with deep equity understanding and practice:

- **Expansive Perspective Taking:** Ability to see perspectives other than that of oneself or immediate group, and being mentally, emotionally, and practically open to being part of an interconnected whole. [But not all cultures hold an individualistic, self-focused stance as the starting point.]
- **Mental Model Agility:** Awareness and ability to change one's mental images of how a problem is defined and what solutions may exist. [But such agility needs to account for privilege and power.]
- **Specialized Tools to See Systems:** Specialized analytic tools and methods are needed to make the imperceivable parts of systems perceivable [But what's imperceivable to dominant culture people may be highly perceivable to non-dominant people.]

Sheryl: The potential challenges or impediments to embedding equity in these approaches are several. **Deep Equity begins with *Expansive Perspective Taking.*** A lot of what we see in the systems change field is what we would term **"Eureka!"** or "Columbus" moments—that is, "discoveries" of "new" approaches that were already decades-long practice in the equity field, and perhaps millennia old in some cultures and places. These approaches are often appropriated, re-packaged, marketed, and sold as "novel." We also see that such re-packaging is too often missing key, additional components of equity, which makes their "sexiness" and "newness" dangerous. I'll say more about this as we go on in this conversation.

The point here is that: *equity is of a piece*, and if it is pursued piecemeal, without understanding the full context and implications of pulling on one thread, the potential fallout and harm is both predictable (from an equity perspective), and egregious because it keeps happening, and equity people are often telling those leading large-scale systems change efforts *the same things over and over and over again.*

The issue here is not that systems change actors should stop doing what they're doing *or* that they have to suddenly become "deep equity" people in order to be credible or safe change agents. Neither of those "solutions" is tenable. **What powerful and influential systems change actors can and need to do—(it *behooves* them, I would**

dare say)—is to *skillfully, authentically, and humbly PARTNER with long-time Deep Equity people, in non-tokenized ways,*[15] *to learn from, co-analyze, co-create solutions, co-assess progress, and jointly course correct; all in deep partnership with those most impacted.* Without such authentic partnership, we will continue to experience the horrific—(and utterly preventable)—results we have seen in systems change efforts for decades. We can all share these "horror" stories (some decades old, and some, unfortunately, more recent), whether in education, collective impact, the environment, or other fields.

Before the 2016 presidential election, equity change agents had to struggle, cajole, jump up and down, and create all kinds of fuss to get legitimacy and attention for such approaches. Now, many kinds of organizations, networks, and philanthropic institutions who *may have never touched* equity with a ten-foot pole are authentically seeking deep, comprehensive, transformation support. This is an awesome, incredible, and unprecedented time in my experience over the last 25 years.

What we have to be careful of now is the too-prevalent phenomenon of "woke Olympics" (a term I heard an equity client share a couple years ago). Woke Olympics refers to the habit of many dominant culture people—especially, often white people—who have newly discovered equity to posture as if they are now "woke," and try to "school" their colleagues and friends in equity, or posture to people of color, Indigenous people, and other non-dominant people about the depth of their awareness. This is often done without humility, with limited acknowledgement of their recent conversion, and without sufficient awareness and acknowledgement of how much further they have to go. This apparent arrogance and unawareness is not new, but is still harmful, because it demonstrates a lack of receptivity to listen and be in a **learner stance.** For those who are used to being knowledgeable, the go-to "expert," and the thought leader, this stance can be awkward, uncomfortable, or unfamiliar, but it is a CORE equity stance.

Deep Equity people in fact *look* for this stance when considering an authentic partner. **There is <u>SO</u> much more to say about this in terms of what it actually takes to be in REAL partnership, particularly for those who are "new to the equity party" and have a legacy or history of lacking awareness of their power, privilege, and whiteness.** For Deep Equity people to trust these actors who are "new to the game" will take A LOT of work, skill-building, trust-building, and demonstration of credibility and worthiness on the part of dominant culture people. They have to be humble, patient, NON-DEFENSIVE, and ready for this work. It is, or *can* and *should be, deeply humbling* for people…

Equity is ultimately about: *How do we be more human together and create social and environmental conditions on the planet where all can thrive and share their gifts in love and joy?* This is what we are doing…

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[15] Brissett, Leniece F., Kerrien Suarez and Andrew Plumley. *How to Lose/Retain Diverse Leaders in 365 Days.* Equity in the Center, 2018. https://www.wokeatwork.org/blog-all/how-to-lose-retain-diverse-leaders-in-365-days

I'd like to further add that **all of the tenets of systems change you mentioned are actually *core to Deep Equity***. Naming this up front will hopefully help reduce some of the "Eureka!" tendencies of those in the systems change field who are trying to learn about equity (or deepen their equity capacity) and may become enamored with the sexiness of their new discoveries in the systems change arena. I don't want to offend, but I really think we need to drive this home: *that Deep Equity is Systems Change work, but Systems Change work is too often (most often?) not Deep Equity work.*

To integrate with deep equity, systems change actors would need to **recognize that *Expansive Perspective Taking* is a core aspect of equity** and then **connect** to those who take this approach in their work, to *normalize and embed* this consciousness shift as "not new." This is *critically* important…

Please also note that *we are saying* **Deep Equity to distinguish it from "equity light"** efforts that may include components of the approaches we're sharing, but stop short of a full understanding of equity at individual, interpersonal, institutional, *and* systemic levels of systems change. This is VERY specific.

Mark: I want to build on your comment about *Expansive Perspective Taking* being core to equity. When one gets out of the narrow world of traditional white dominant management thinking and theory, and instead looks to the perspective-taking in some other traditions—especially Black, Indigenous, and POC in the west and the global South, and some strains of social justice feminism—central and deep themes include mutualism and attention to impact on entire communities, on multiple future generations, and on the earth's ecosystems.

This is also related to the second tenet under the **individual** level, ***Mental Model Agility***, as we are calling it. Too often there is a narrow or limited range of the types of mental models that are even recognized and considered by dominant culture people. "Shifting mental models" is often seen among dominant culture people *primarily* as a cognitive, conceptual problem, with a lack of awareness of how social positioning and political power shape the mental models themselves, the centrality they are given in remaking complex systems, and patterns of exclusion and competition among dominant culture systems change proponents.

Systems change actors working to embed equity understanding, practice, and approach need to ***develop skill in power analysis, and apply that skill to their own group(s), and to their own approaches to theorizing, writing and acting, as well as in partnership with the people and groups in systems they seek to impact and change.***

Sheryl: Yes, I'd like to underscore this point about power analysis. Normalizing the "newer" aspects of systems change is about the use of power and privilege. The habit of those in positions of power and privilege *when they are unconsciously wielding these with limited equity capacity*, is to *jockey for visibility* and relevance.

The "competition" mindset and habit leads to *common, cultivated, and trained behaviors* among dominant culture (often white, male, etc.) people **but also often adopted and assimilated into as** *"desirable" and "good" habits by non-dominant people. This mindset* is antithetical to an equity mindset and behavior. This is also a *critical* point. This tendency will have to be *noticed and broken* to be a true ally (or "accomplice") and equity-based agent of change.

This habit can sometimes take the form of failing to name non-dominant culture contributors to our vision and thinking *even when we know who they are.* I had this experience recently with a colleague in the systems change field, and also a few years ago in a public forum where two well-known, white, male systems change leaders were about to speak and I realized from the description of the work, and the almost all white audience—that equity was likely not going to be addressed at all. Ten minutes before one of these individuals was going to speak, I went up to him to say that I couldn't, in good conscience, allow him to talk about systems change and not include equity. He seemed flustered, understandably, because he was about to speak in a few minutes. I looked at him with an expression like, "I think you're gonna have to figure it out," because otherwise the needed depth would be missing. When he went out to speak, I sat back down and partway through his talk, he looked at me as if to cue me to say something. I left it to him to show leadership in this as a white person, and *not have the burden be placed on me as a woman of color* (once again) to name equity and educate him and the audience. I was hoping he would admit his mea culpa and at least mention that a Black woman brought this to his attention. He mentioned equity as important to systems change and did not mention me or that anyone had brought this to his attention. It was shocking!

Later that day, a white woman came up to me, knowing my focus on equity, and said, "Did you hear what ___ said about equity? That was great, wasn't it!" I told her I told him to say that. She looked dismayed and disappointed in him, as I told her this is unfortunately typical, egregious behavior of dominant culture individuals in positions of power—i.e., to *not* wield that power and privilege to increase the visibility of those differently positioned in certain forums AND to *not* admit their mistakes and limitations in public.

This is commonly experienced white and male dominant behavior that I (and undoubtedly many white women, Indigenous people, TGNC[16] people, and people of color) have experienced over and over again.

The question is, *Why does this keep happening* when those who profess to be committed to equity presumably know better, in this day and age with such a proliferation of materials, speakers, and information about deep approaches to equity? How can such oblivion continue? If it is willful, it is shameful (I have to say); and if it is oblivion, then what is *that* about?

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[16] Trans and gender-nonconforming.

Naming non-dominant people who have helped deepen your equity understanding and practice or led work is a DISCIPLINED PRACTICE that those authentically committed to equity do *as a matter of course*. One has to interrogate why this isn't done. I think it's typically to gain visibility, market share, and to sideline others (at worst). At best, it is lack of knowledge and perhaps unexamined habits. But how is this unawareness still possible? I can't tell if it's that they don't think it's important, don't understand that it's important, forget, or want to protect their turf…I think it's sometimes a combination, but it is too often offensive, hurtful, and continues to add to the already extensive labor of people of color, Indigenous people, women, TGNC, and other repeatedly marginalized groups…

Providing *visibility* to colleagues of color and those with less influence or perceived power in a space where you have it is an equity approach that *needs to be learned and actively cultivated* to disrupt dated, destructive, divisive habits. These approaches are core to systems change actors who want to embed equity.

Mark: There is so much embedded in this story and your reflections on it. Since we've worked together for a while now, I've begun seeing the kind of behavior you're describing as ubiquitous. I believe, based on my own experience and journey, it is especially ubiquitous among dominant group people trained in highly competitive academic institutions and/or consulting firms.

Going back to **Expansive Perspective Taking**, I have noticed that there seems to be a fundamental assumption in the material and approaches I've been looking at, that "me-focused consciousness" is a universal human stance. This indicates a lack of awareness of collectivist and communal cultures, especially in Indigenous communities and communities of color, where consciousness of "belonging" is more strongly emphasized than in the more individualist, white cultures in which many of these "theories" were developed. What are your thoughts on this?

Sheryl: I want to make sure we don't accidentally dichotomize "dominant" and "non-dominant" consciousness and approaches. In my experience, **healthy non-dominant (as well as dominant) culture people think in BOTH "me" and "we;" it is <u>non-dual</u>.** The pattern I find often is that powerful, dominant culture people (white, male dominant in particular in the U.S. context) think in "me," so the discovery of "we" is like a revelation. Whereas non-dominant folks (white women, Indigenous people, people of color, TGNC) often think in BOTH "we" and "me"… I do think there's sometimes guilt on the part of some non-dominant folks in thinking of "me," as if this is "selfish," as opposed to self-*loving* so that we can be in healthy relationship with others. There's a lot to do to address this sometimes as well… Maybe this is oversimplifying, but non-dominant people don't have the luxury, I think, of being so binary. We—or many of us— just don't think like that.

I want to also say that *there is nothing wrong with white culture, or cis-male culture per se*. The issue is *dominance*. We need to make this exceedingly clear, lest the reader think that our focus and pointing out these dominant cultures means we have some fundamental issue with them. We don't. We are interrogating the dynamics across cultures in systems change efforts that are often not perceived, ignored, and harmful.

Mark: The other thing that dominant culture systems change actors can do to embed equity into this ***Expansive Perspective Taking*** evolution, is to increase our **openness, exposure, and proximity to multiple forms of knowing or knowledge** (such as ancestral wisdom, experiential knowledge), and immerse in other cultures' approaches to leadership, decision-making, sharing of material goods, relationships, etc.[17]

Sheryl: Yes. **We need to also make sure that this "immersion" is *skillful* and not exploitative.** I'd also like to point out that this also occurs with "dominant culture-performing" systems change actors. Sometimes non-dominant people have adopted ways of behaving, analyzing, etc. that are dominant culture and inhibiting other ways of being that they/we may have access to (or even have been raised with) *but have been suppressed, unsupported, or trained out of us* as "not the right way to think, be, do, analyze, etc."

I wanna name that **sometimes we have assimilated *really, really well*—**to our detriment if we are suppressing other ways of being, knowing, and doing that limit our creativity, innovation, care, empathy, compassion, strategic analysis, and powerful ability to help, be in partnership with others, and create impact toward equity…

Mark: It *is* profound to see how powerfully dominant culture can drive other forms of being and doing out of existence, no matter what one's own cultural background. We will come back to what we mean by "skillful immersion" later. For now, let's turn to the last tenet under "individual," the perceived need for ***Specialized Tools*** from expert change agents and the belief that only these tools make the imperceptible, perceivable.

Providing visibility to colleagues of color and those with less influence or perceived power in a space where you have it is an equity approach that needs to be learned and actively cultivated to disrupt dated, destructive, divisive habits. These approaches are core to systems change actors who want to embed equity.

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[17] Sloan Perry, Elissa and Aja Couchois Duncan. *Multiple Ways Of Knowing: Expanding How We Know*. Nonprofit Quarterly, 2017. https://nonprofitquarterly.org/multiple-ways-knowing-expanding-know/

The issue here is what you shared with me, Sheryl, of **what is perceivable and to whom**, which can be an area of unawareness for those with power and privilege. Your point was that people who are socially marginalized, and those without certain forms of power, see and experience power dynamics on a daily basis that are often not perceived by those exercising that power.

In reflecting on my own equity journey, and in working with other white people, it takes a long time for most of us to grasp the enormity, pervasiveness, and multi-generational nature of the harm that ingrained (mainly unconscious) beliefs of white superiority—let alone conscious acts of racist cruelty—has and is causing. Our social, political, and economic power—combined with cultural habits of being numb to feelings and of needing to see ourselves as good people—shield us from *having* to perceive the impact of racism and our participation in it.

However, as I have learned from many Indigenous and people of color colleagues and friends over the years, Indigenous people and people of color, in particular Black people in the U.S., see and understand these power dynamics very clearly and have great wells of individual and collective resilience with which to confront them. So these **Specialized Tools to Perceive System Dynamics** may be most needed by and revelatory for those with more formal and social power and privilege.

Sheryl: Yes, thank you. And I also want to say **"certain kinds of power and privilege."** I don't want to give the impression that people of color, Indigenous people, and other non-dominant people don't have power. It depends on how you conceive of "power" and "influence." We need to be careful here and make sure we expand definitions for some readers. I want to highlight that we all have power. The issue is about how **conscious we are of the power we have and how we wield that toward equity or not...**

Mark: That raises the question: what would it take for systems thinkers and change agents to open up to the tools of perceiving systems that have been in effective use by communities of color and Indigenous communities for centuries? This question brings us to another...

Another indispensable pathway forward regarding what is made perceivable is inner work,[18] which enables change agents to stay centered, present, and in touch with our emotions and with the source of what most deeply nourishes and replenishes us. Equitable Systems Change is not effective or sustainable without the compassion, resilience, healing from trauma, and ability to confront one's own denial, guilt, anger, fragility, etc. that inner work makes possible.

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[18] Petty, Sheryl, Kristen Zimmerman and Mark Leach. T*oward Love, Healing, Resilience & Alignment: The Inner Work of Social Transformation & Justice. Nonprofit Quarterly, 2017. https://nonprofitquarterly.org/toward-love-healing-resilience-alignment-inner-work-social-transformation-justice/*

Sheryl: Yes, there's a lot to say here. I also published an article called *"Waking Up to All of Ourselves: Inner Work, Social Justice & Systems Change,"*[19] specifically written with the current "mindfulness" community in mind, which I've been asked to participate in from an equity perspective (though I've been a practitioner of Tibetan Buddhism as well as African-based traditions for more than two decades). Part of the article addresses the prevalence in the mindfulness field (and those who focus on interiority) of neglecting or giving short shrift to the social dimensions, including race, power, and privilege. There's also an article in that journal called *"Spiritual Bypassing in the Mindfulness Movement,"* which specifically addresses this phenomenon that is so often justified.[20] There's a perspective that focusing on equity (and in particular, race) is evidence of some lack in your inner work or spiritual practice, and that you are somehow "backwards" or deficient in your practice if these aspects are attended to. This is a misunderstanding of the relationship between inner work and systems change—both *require* each other from an equity perspective. Buddhism has very particular ways of talking about this, but—excuse me for saying this—the way of engaging Buddhism that many (often white) people in the United States practice may be an approach that misses its full depth and profundity to deal in very precise and skillful ways with the multitude of **particularity** and difference in our shared lives.

We can be *present* and *attentive* to our embodied realities *while not experiencing ourselves as "trapped"* or "*fundamentally patterned or shaped*" by them. This is the non-duality of "absolute" and "relative truth," and is the source and expression of our manifest compassion for ourselves, each other, and the planet. We are not ignoring anything for a "blissed out" reality where we do not *feel* each other and our pain. While *pain* may be inevitable, *suffering* is not. This is the *difference* we are speaking of when we talk about the ability to **heal**; we are *not* talking about "numbness" or "disconnectedness." Deep Equity is <u>vivid</u>, present, and <u>engaged</u> in the particular AND the absolute/transcendent...

This absence or *"binary, either/or" thinking* in some conceptions of spiritual practice—that you have to somehow "leave" interest in the "mundane" things of this world behind in order to have a deep practice—does great disservice to the traditions upon which these practices are based, and profoundly constrains our *compassion.* There is SOO much to say here. I wish we had more time to focus on just this. It is worth its own prolific discussion forums...

The issue is that, if there is not robust development of equity understanding and practice, one's inner work practice—(whether sacred or secular)—will be profoundly inhibited and often distorted because we cannot understand each other, because we are ignoring it. We are ignoring the *particularities* of our life experiences which are profoundly shaping the day-to-day conditions under which people are living, breathing, interacting, and trying to survive (or thrive). This is a form of **erasure.** We

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[19] Petty, Sheryl. "Waking Up All Of Ourselves: Inner Work, Social Justice, & Systems Change." *Initiative for Contemplation, Equity, and Action* Journal. Vol. 1, No. 1, pages 1-14, 2017. http://www.contemplativemind.org/files/ICEA_vol1_2017.pdf
[20] Sherrell, Carla and Judith Simmer-Brown. "Spiritual Bypassing in the Mindfulness Movement." *Initiative for Contemplation, Equity, and Action Journal.* Vol. 1, No. 1, pages 25-93, 2017. http://www.contemplativemind.org/files/ICEA_vol1_2017.pdf

have to be willing to truly *see, understand,* and *grapple* with these things if we are to ever truly be able to support changing collective conditions for the better. And those at the center of suffering at a societal level must be *deeply driving* and *informing* these efforts. (This gets us to another point that we'll go into later about **belief in the capacity, skill, knowledge, and wisdom** of those most negatively impacted by social conditions…)

There was a major teacher in Tibetan Buddhism, Chögyam Trungpa Rinpoche, who (if my memory serves correctly) used the term "idiot compassion," which is a great way to describe this. We need, what Buddhism terms, both wisdom *and* skillful means, and ***equity is a part of skillful means.*** Insight or clear seeing is an aspect or manifestation of wisdom, which is at its essence about unhindered openness or receptivity. Without these: Openness, Receptivity, Insight/Clear Perception, Knowledge and Skill (particularly in equity, without ignoring race)—there is little hope for deep, lasting, kind, and just Systems Change…

Mark: What I'm hearing here, and have myself experienced, is that openness and the courage to see clearly is fundamental to true Systems Change, and that this requires some way to nourish and replenish ourselves—whether through tradition-based spiritual practice or other connections to "source" (such as music or other creative arts, or immersion in nature, or in psychological work, or in the solidarity found in intentional community, or in political organizing, and many others). And that whatever one's inner work practice, it will not lead to clear seeing and openness unless it can deal with the realities of the material and social world as it is. I'm especially interested to hear more about why you emphasize the importance of not ignoring race when engaging equity as part of inner work.

Sheryl: I say "without ignoring race" because, especially in the United States, so many white actors and change agents are struggling with this, and want to ignore or downplay and gloss over this aspect of equity (and focus on gender or LGBTQ identity, or socioeconomics, or immigration status—all important areas).

Some of this sidelining of race comes from guilt or fear—guilt about the devastating history of the United States, that was founded on racism and genocide, and then created a whole set, actually <u>all</u>, of our social institutions around this (education, health care, workforce, housing, etc.). The fear seems to be of being found out or viewed as a "bad person."

There is a type of *paralysis* that is rampant among many (but certainly not all) white people in the United States that is preventing many from seeing and wanting to grapple with the depth of suffering and impact of social systems on people's *actual lives.* What it looks like in the field of systems change (as I have observed it) is a type of "running"—an attempt to outrun the pain and confusion of dealing with equity (and race, in particular) deeply. So, there's a whole set of excuse-making for why it's "not necessary" or "not helpful" or a "distraction" or "divisive" or "we already did that" or "we're already doing that" or "look! a puppy!" or anything that will prevent us from actually going there. I will say there are examples of white leaders and change agents (including communities of practice, organizations, philanthropists, nonprofits, etc.) who are doing a profound job of tackling this and supporting their peers to do so as well. Some of them many people already know, like Robin DiAngelo, Tim Wise, Showing Up for Racial Justice (SURJ), and www.whiteawake. org (which has GREAT resources for this intersection between inner work and equity in particular).

We (like these amazing white allies) use an ***intersectional*** lens, which acknowledges the *interrelationship* between multiple identities, without downplaying the historical context of specific countries (and the impact of European colonialism around the globe, which has "color," racial, gender, language, economic, and many other under- and overtones)...[21]

Inner work (in some form, pursued at depth) is the only solution I know of that can support people and groups to reckon with this historical and current pain, so that we don't become paralyzed by it—either as dominant or non-dominant people. So that we can then ***use the energy of that reckoning*** in healthy ways…

Inner work can take the form of any number of healing approaches—hiking, biking, yoga or other physical practices, therapeutic bodywork, sacred traditional approaches, sound/music, dance, or other means that we are using to **heal, cleanse, restore, renew, re-center, re-ground, anchor, and connect us more to ourselves and to each other, in fierce kindness, dignity, honor, and courage.** These are the mechanisms that will allow us to see more deeply what is *true*, what is *needed*, the *pathways* forward, and *how* to pursue them without fear (or at least with a lot less fear…).

Mark: Yes! And as I've heard you say many times, the main kind of racial healing that white people need to do is *un-numbing* to the pain of others. In my experience, the only way I can do *that*—to increase my ability to see and truly let in the painful and multi-generational traumatic effects of racism and colonialism—is to cultivate, internally, the ability to see and learn from parts of myself that are damaged and have hurt others. That is the journey I am on at the individual level.

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[21] Crenshaw, Kimberlé. *The Urgency of Intersectionality.* TEDWomen, 2016. https://www.ted.com/talks/kimberle_crenshaw_the_urgency_of_intersectionality

Sheryl: Ok, and I would say that it's un-numbing to ourselves, to experiencing and feeling the world, just un-numbing PERIOD... It's not even just to "pain." It's un-numbing to the depth of FEELING and SENSATION. This is _so_ important. It's not just about suffering, (though we can focus there...). It's about **feeling** the depth of life. It is this _sensitivity_ and ability to deeply _feel_ that allows us to be compassionate, because then our action is **informed** by our deeper _perceptions_ and _experiences_ of life, each other and ourselves… **Equity actors who are grounded in inner work, are profoundly compassionate, but not through erasure, not through spiritual bypassing.** They are compassionate through seeing, engaging, and experiencing the specific _as well as_ the universal, and open to being _changed_ by those experiences.

I can't overemphasize this from an equity perspective. This is RADICAL kindness—(which, by the way, is not the same as "niceness," which can be a surface or avoidance strategy).

We'll take a break here for the reader to review the above section on the **INDIVIDUAL** level of Systems Change with Deep Equity embedded. Then we will move on to the **INTERPERSONAL** level.

Inner work (in some form, pursued at depth) is the only solution I know of that can support people and groups to reckon with this historical and current pain, so that we don't become paralyzed by it—either as dominant or non-dominant people. So that we can then _use the energy of that reckoning_ in healthy ways…

"

What powerful and influential systems change actors can and need to do—(it behooves them, I would dare say)—is to skillfully, authentically, and humbly <u>partner</u> with long-time Deep Equity people, in non-tokenized ways, to learn from, co-analyze, co-create solutions, co-assess progress, and jointly course correct; all in deep partnership with those most impacted.

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Levels of Deep Equity Work	Current Tenets of Systems Change With a Limited or Absent Equity Understanding & Practice
Individual	At the **Individual Level, Systems Change** requires: 1. Expansive Perspective Taking 2. Mental Model Agility 3. Specialized Tools to Perceive Systems
Interpersonal	At the **Interpersonal Level, Systems Change** requires: **4. Social Network Building:** Individual links to people outside one's close network fosters the trust necessary for collective problem solving. **5. Quality of Presence and Listening:** Individual-level states of openness and awareness needed to manifest in relationships of deep listening, mutual understanding, and trust.
Institutional	At the **Institutional Level, Systems Change** requires: 6. Diverse and Inclusive Institutions 7. Shared and Distributed Leadership
Systemic/ Societal	At the **Societal Level, Systems Change** requires: 8. Engaging Key Stakeholders 9. Shared View of Current Reality and System Dynamics 10. Shared View of Desired/Emerging Future 11. Experiments in the Direction of Shared Future 12. Transformation of the Nature and Quality of Awareness, Listening, and Consciousness

SECTION 2:
The INTERPERSONAL Level of Deep Equity and Systems Change

Mark: There are **two tenets** that I have noticed at the **INTERPERSONAL** level in the field of systems change that I wanna pick up on:

- **Social Network Building:** Individual links to people outside one's close network fosters the trust necessary for collective problem solving. [But unconscious bias against unfamiliar ways of knowing and being limit authentic relationships and trust.]
- **Quality of Presence and Listening:** Individual-level states of openness and awareness needed to manifest in relationships of deep listening, mutual understanding, and trust. [But dominant-culture members are often unaware of how their group membership distorts and limits their perceptions of and relationships with non-dominant people.]

Let's start with one of the **impediments for embedding equity into *Social Network Building*: unconscious bias** against those whose ways of knowing and expressing are unfamiliar. This bias limits authentic relationship building and mutual trust.

Sheryl: I would add to this: Ways of knowing and expressing that **have less social capital,** including being **historically and currently denigrated as inferior** in society, implicitly and/or explicitly.

Mark: The other challenge to this is that "inclusion" typically only extends to people and groups with whom dominant group members feel comfortable.

Sheryl: Yes, those who conduct themselves/(ourselves) in assimilated and more familiar modes.

Mark: There is also often a lack of awareness of how one's group membership shapes others' perceptions of oneself, and how that is a barrier to interpersonal trust. There is a need for **authentic "owning" of one's own group, history, impact on other groups, etc.** which can open new channels of communication, healing, and trust…

Sheryl: This is SO important. I want to put a finer point on it. Can you give an example?

Mark: I remember many years ago, a Black colleague of mine shared with me that her father taught her that white people were "predatory and untrustworthy." I remember to this day how that comment pierced my naive assumption that because I was a "good person" I could separate myself from those "other" white people who were not as racially aware or interculturally skilled as I thought myself to be.

I realized then that I had much still to learn about the history of my own people, and the role my ancestors and present day fellow-whites have played in creating a situation that would lead a loving, Black father to warn his daughter about "predatory" whites. I can see now that my unwillingness to really face the role of white people in anti-Black racism and oppression was a siren signal to my colleagues of color that I "hadn't done my work," placing real limits on their trust in me and on how far our personal or work relationships could go.

I think a pathway forward here is to ensure that all systems change efforts are grounded in acknowledgment of our particular individual histories and multiple identities, as well as our shared humanity. Systems change efforts need to be aligned around a clear vision for change that recognizes the unique and individual needs of everyone in the system. Efforts should seek to repair, restore, and lift up relationships and connections across people and communities to support shared stewardship for change…

Sheryl: This reminds me of Change Elemental and Building Movement Project's webinar on this in 2018.[22] One of the four components shared in that webinar that distinguish Systems Change with equity understanding and practice, from other systems change efforts, was a focus on "shared humanity." This is so important and often left out, and this is different from a generalized focus on "humanity" where our uniqueness and specificity as individuals and as communities is erased. I'm not talking about that version of "shared humanity." As we've talked about, the *universal* and the *particular* exist simultaneously in Deep Equity...

I'm not sure if folks engaged in systems change efforts (who don't already have significant equity understanding and practice) realize that non-dominant people have been *dehumanized* for so very long, and we are still often looked at as 'suspect' or 'inferior' <u>unless</u> we have assimilated and conform sufficiently to dominant notions of intelligence, beauty, communication, 'logic,' 'reason,' 'common sense,' what is 'good' and 'right,' etc. This happens <u>every day</u>.

A few years ago, I was giving a joint keynote with a very well known and influential (in those circles) white, male counterpart (who I have a lot of respect for) to a largely white audience about equity and inner work. After the end of it, an extremely famous white man who has done a lot to advance the mindfulness field, came up to me and said, "You were so *articulate*." He didn't say that to my white male counterpart who was sitting next to me. I just looked at him, and then he caught himself, and said, "___ was articulate too" (referring to my co-presenter). He looked embarrassed, because he realized that what he said implied that *he was surprised* that I was "articulate."

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[22] *Systems Change with an Equity Lens: Community Interventions that Shift Power and Center Race.* Change Elemental and Building Movement Project, 2018. https://changeelemental.org/resources/systems-change-with-an-equity-lens-community-interventions-that-shift-power-and-center-race/

Now, mind you, definitions of what "articulate" actually is and isn't can be problematic in themselves if they prefer—(as they typically do)—certain, dominant forms of expression over other, non-dominant ones. So, he seemed surprised that I was so "literate" and could express myself in a certain way in that forum and be in this body OR he had little experience with Black people or Black women or people who look young, etc. who could speak as I did…. This happens all the time. This notion of "articulate" is actually googleable, it's such a phenomenon, especially around Black people.

So, the solution here is around *deep* and *substantive exposure* to other ways of expressing and knowing, so that they become more *familiar* and not so surprising, so that our myopia of limited experience is not so prominent. I say "deep and substantive" **so that those "exposures" aren't token, surface, cursory, or exploitative,** as they so often are.

We have to become profoundly familiar with other cultural ways of being in order to be more effective change agents in the world, and then get educated so that we know when we have biases or inappropriate preferences that are privileging certain forms of knowing, being, and doing over others, which limits our ability to recognize, support, partner with, and leverage ***intelligence and gifts in their multiple forms.*** This level of myopia is *rampant* and often gets justified as, "I didn't know" (or those other forms of intelligence aren't recognized <u>as</u> intelligent). There is too much knowledge now about cross-cultural literacy, too many prevalent, easily accessible, high quality tools and resources for deepening one's competence and literacy across different cultural ways of being and expressing, to have this still be an excuse.

The question is: *Are we putting in the work*? As social change agents, we don't have a choice if we want to do good and don't want to do harm. If we're not putting in the work, we're culpable…

Mark: Thank you for highlighting the importance of getting out of one's familiar surroundings in a sustained and meaningful way. One way that has occurred very organically in my life is by being a long-term member of a church community whose members are mainly first and second generation immigrants from the Caribbean and central and western Africa. The church hired my wife, who is white, as their pastor 10 years ago. Deep immersion in this church community (sharing weekly worship and prayer, singing in the choir, seeing one another through transitions such as births, baptisms, weddings, anniversaries and deaths, doing political and community organizing together, breaking bread in each other's homes, having difficult conversations across significant differences in views about things like same sex marriage, and having a political asylum seeker as our housemate for over a year) has been both *a window* into many worlds I did not grow up in, and also, and more importantly, *a mirror* reflecting my own social and political position (the arena of white "privilege" that is simultaneously a bubble, trap, and barrier to liberation of self and others), and mental conditioning as a U.S. born, white man.

This immersion has invited and challenged me to become less emotionally armored, more trusting in situations I cannot control, and humbled and instructed by levels of individual and community resilience I've rarely experienced myself or among other white people. It has helped me to experience the release of stress that comes with a more fluid understanding of time and to have the joy of just *being* with others and releasing the relentless drive of constant (and perfectionist!) *doing*. It has also challenged me to find new ways to enter into dialogue with people I disagree with— such as with recent immigrants coming from more socially conservative African cultures and churches, who do not share my views and values on issues such as LGBTQ rights, abortion, the role of men and women in family and public life, and many other articles of "progressive" faith. We are all getting out of familiar surroundings and stretching.

To my white colleagues I want to say that if I have learned anything in this equity journey, it is to give up clinging to any thought of having arrived anywhere, and take the invitation—that is life itself, in this inequitable world—to go ever deeper so we stop causing so much harm to so-called "others," and to aspire to the liberation of all from the incalculable damage of racism and intersecting inequities, including our own selves.

The question is: *Are we putting in the work?* As social change agents, we don't have a choice if we want to do good and don't want to do harm. If we're not putting in the work, we're culpable…

Sheryl: We have also found that some systems change actors and authors are often not aware that their efforts *are* in fact shallow in terms of equity because of the lack of awareness of how "culturally determined" as you say our worlds often are. Because of this lack of awareness, sometimes systems change efforts are being **passed off as having equity embedded**. Or, I've seen systems change actors focus on a global context (which is important), and ignore U.S. history in a "universalizing" attempt, which avoids actually grappling with a history that continues to cause so much pain nationally and globally.

Universalizing can have its place *so long as* it does not erase the specifics of local context which are necessary to address sufficiently in order to heal. *Both/and* approaches are needed: the *universal* and the *particular*. Such avoidance is dangerous (and egregious) since it can be misleading to those newer on an equity journey who look to those systems change thought leaders for guidance and modeling…

Mark: This might be a good place to remind readers of what we said in our introduction: that this article will be a sometimes bumpy and uncomfortable journey—not dissimilar in some respects from the process of deepening in equity awareness and skill. And that's fine! So please hang in with us as we transition to discuss how a shift to a more *Expansive Awareness* manifests at the **INTERPERSONAL** level. If these systems change environments do not explicitly take race into account, especially in the U.S., the results will be flawed and self-limiting to what dominant culture is comfortable with seeing/hearing…

Sheryl: We need to point to where this *Expansion of Awareness is already happening* **in Deep Equity and social justice fields**, so that it highlights the lack of awareness of and hence need for connection to the profundity of work that has been happening for a *very** long time in those arenas. This is back to the "Eureka/Columbus" syndrome. It's as if the shift from individual-centered to eco-system centered awareness is (again) a revelation. And I have to ask, ***Who is this new for and who is it not?*** And has there been sufficient acknowledgement by systems change practitioners of the deep and profound history of, and current practice in, multi-identitied communities? If not, why not? How can one have no (or limited) awareness of these things or not *act* on this awareness, in this day and age, and be an actor on such a large scale of social change? Google is prolific!… Where is the *partnership*?!

I asked a well-known systems change actor to write on Equity and Systems Change for a publication I curated. The piece was co-authored with someone who clearly had some depth in white awareness and equity, given the profundity of what was submitted for the article. This example of partnership is helpful for dominant culture actors, *so long as there is acknowledgment* of the equity content that the co-author or partner in the activity brings, the content is not claimed for one's own, and there is no purporting of equity capacity beyond one's current knowledge and skill set.

This picks up on the second area under **INTERPERSONAL**, where *Quality of Presence and Listening* are *embedded* in and part and parcel to Deep Equity approaches. Again, some acknowledgement of this is important, as well as *partnering* with those for whom these aspects of Systems Change are not "new." **Pathways forward from this are to create relationships with and *explore* for the wisdom that non-dominant communities and social change practitioners are *already* using**, to learn and share and deepen approaches that are beyond our skill sets and knowledge.

Mark: One of the most powerful experiences I've had of expansive perspective taking was when I was consulting in Sri Lanka with a group of Asian NGO leaders and development "experts" from USAID. As the only common language among all the participants was English, verbal exchanges privileged the almost entirely white and U.S. born group of native English speakers. So I introduced an exercise where each group had 45 minutes to draw a large picture, using few or no words, to describe their vision of development outcomes for a certain region, the current state, and what it would take to get from here to there.

The NGO leaders objected that they would need at least two or three hours. I could hear the U.S. aid workers grumbling among themselves about wasting time, and I too had reservations about spending this much of our two days together on this one exercise. But we settled on the longer time. I also asked both groups to report on their process when they returned.

The American group (all white and all male) stood around a flipchart stand. Two members jockeyed to have their vision up on the flipchart first and were literally talking and writing at the same time, trying to identify other members of their group that they could enlist to support their view. They were done in about 45 minutes, having produced three flipcharts with various unaligned ideas about the future and how to get there.

Three hours later the Asian NGO leaders returned, proudly carrying together on their shoulders a ten foot long mural, showing the path (with the motif of a river flowing through a verdant forest) from the present reality of their region to the future they saw for their great, great grandchildren. They had first gone for a quiet walk outside, then gathered by a big tree to hear each person's reflections and to look for the shared meaning emerging from their conversation. When the outlines of their shared vision and path were clear to all, they asked the best artist in the group to represent it on taped-together newsprint, and others added to the artist's picture.

The Americans (including me) were deeply humbled in part by the strength and multi-generational scope of their vision and the detailed, intimate knowledge the NGO leaders had of the region; but even more so by the NGO leaders' ways of being and thinking and creating together. After that, the power relations between the two groups shifted dramatically.

Sheryl: The issues here are many, including that there is too often a lack of awareness of power and privilege, cross-cultural literacy, and awareness of and value for non-dominant approaches to change, among SO many other areas.[23] Deep equity **includes and goes beyond 'generic' approaches to systems change**.

Because of racism and power differentials (including differential access to publishing, visibility, funding, credibility, etc.), approaches from non-dominant practitioners are often invisible to mainstream, typically well-funded, and acknowledged dominant actors—*unless you are already part of those equity-based communities of practice.*

The issue here is also that non-dominant communities **necessarily have to be (at least) bicultural**—literate across two or more cultures just to survive, let alone to thrive. Dominant culture people in the United States *don't have to do this*. **So, in order to become deeply cross-culturally literate, *dominant culture folks (at least in the U.S.) have to be intentional and dedicated*.**

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[23]Petty, Sheryl. *The New Frontier: An Integrated Framework for Equity & Transformative Improvement in Education*. California Tomorrow, 2010. See pages 50-59. http://www.racialequitytools.org/resourcefiles/petty.pdf

They have to make a concerted, on-going effort. Non-dominant communities are having to work hard *every day* just to prove our inherent value, legitimacy, and worth. If we are to REALLY be in mutually supportive, authentic relationships as social systems change agents, then **real partnership** requires that dominant culture social change actors **do <u>much</u> more of their own work.**

Right now, in my experience, this is not happening sufficiently by some of the most influential change agents, who can make space and room for the voices, visions, efforts, and wisdom of others. One of the main challenges for many of them will be to learn how <u>not</u> to be in the spotlight, and support the visibility of others… There are of course exceptions of influential, dominant culture change agents who *are* authentically partnering with and supporting the efforts, voice, etc. of non-dominant folks, but I'm speaking of some of the most influential and visible systems change actors, nationally and globally.

Mark: Yep. The systems change "literature" contains many great ideas and principles but, outside of some critiques of that literature, I've not seen within the literature itself any deep or extended exploration of how white dominant culture shapes the formation, use, and impact of these ideas and principles. Race, racism, and colonialism are occasionally, but still very rarely and briefly, mentioned in anecdotes from most systems change interventions, or in systems archetypes and maps.

I relate this observation to something you once wrote: "The burial, denial, minimization, and erasure of this [multigenerational racial harm] can compound pain and frustration—materially, psychologically, emotionally, and spiritually. Unacknowledged harm cannot be healed."[24]

Deep equity *includes and goes beyond 'generic' approaches to systems change.* Because of racism and power differentials (including differential access to publishing, visibility, funding, credibility, etc.), approaches from non-dominant practitioners are often invisible to mainstream, typically well-funded, and acknowledged dominant actors—*unless you are already part of those equity-based communities of practice.*

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[24] Petty, Sheryl. "Waking Up All Of Ourselves: Inner Work, Social Justice, & Systems Change." *Initiative for Contemplation, Equity, and Action Journal*. Vol. 1, No. 1, page 9, 2017. http://www.contemplativemind.org/files/ICEA_vol1_2017.pdf

Sheryl: In my experience with many clients and other change agents working on systems change, it's often a place of **numbness**. I have little doubt that dominant culture systems change thinkers/practitioners see themselves as coming from a place of inclusion and compassion for and with the non-dominant people and communities with whom they work.

But if privileged people and writers more deeply explored and acknowledged *as part of their personal and professional work, their own past, ancestry,* **and the way their own groups have been harmed by and harmed others, I feel confident that it would uncover areas of personal unawareness**, expand their perspective and sense of the "we," and most importantly, pave the way for deeper compassion, more multi-racial and multi-identitied partnerships, and more powerful impacts.

We can look at some parts of our shadow(s) and ignore others. You note this above with "areas of unawareness." The size of this can feel monumental when folks feel that they are "progressive" or "woke."[25]

Mark: "**Numbness**" is such a good word for the kind of not perceiving and not feeling about racism that becomes evident at the beginning of almost every journey into exploring whiteness, including my own. I've been honored to take this journey with white senior leaders of organizations, with members of white "caucus groups," and with friends of mine. Through my work with you, Sheryl, on several Deep Equity projects, I've been continually learning and uncovering sometimes embarrassing levels of numbness, fear, and needed skill—as well as tremendous unanticipated joys in the greatly enriched life that continually opens as a result of this journey into and beyond the boundaries of whiteness. The process feels like one of becoming more human, but there's a lot of difficult personal work and awareness-raising needed to unfold in that way. As James Garfield is quoted as saying, *"The truth will set you free, but first it will make you miserable!"...*

We invite you to take a moment to pause and reflect on your own journey with these topics...

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[25] Equity in the Center. *Awake to Woke to Work: Building a Race Equity Culture*. Proinspire, 2018. https://www.equityinthecenter.org/wp-content/uploads/2019/04/Equity-in-Center-Awake-Woke-Work-2019-final-1.pdf

Levels of Deep Equity Work	Current Tenets of Systems Change With a Limited or Absent Equity Understanding & Practice
Individual	At the **Individual Level, Systems Change** requires: 1. Expansive Perspective Taking 2. Mental Model Agility 3. Specialized Tools to Perceive Systems
Interpersonal	At the **Interpersonal Level, Systems Change** requires: 4. Social Network Building 5. Quality of Presence and Listening
Institutional	At the **Institutional Level, Systems Change** requires: 6. **Diverse and Inclusive Institutions:** A diverse staff and inclusive culture prepares an organization to collaborate externally. 7. **Shared and Distributed Leadership:** Shifting the locus of information-processing and decision-making from the "top" to the "bottom" or periphery strengthens institutional effectiveness and responsiveness in complex environments.
Systemic/ Societal	At the **Societal Level, Systems Change** requires: 8. Engaging Key Stakeholders 9. Shared View of Current Reality and System Dynamics 10. Shared View of Desired/Emerging Future 11. Experiments in the Direction of Shared Future 12. Transformation of the Nature and Quality of Awareness, Listening, and Consciousness

SECTION 3:
The INSTITUTIONAL Level of Deep Equity and Systems Change

Mark: We're now ready to move onto the **INSTITUTIONAL** dimensions of systems change. There are two main ones we want to talk about right now:

- **Diverse and Inclusive Institutions:** A diverse staff and inclusive culture prepares an organization to collaborate externally. (But many "diverse and inclusive" organizations have not reckoned internally with power dynamics and inequities, and carry this lack of awareness into external "partnerships" and attempts at systemic problem-solving.)
- **Shared and Distributed Leadership:** Shifting the locus of information-processing and decision-making from the "top" to the "bottom" or periphery strengthens institutional effectiveness and responsiveness in complex environments. (But some dominant-culture members are often unaware of how their group membership distorts and limits their perceptions of and relationships with non-dominant people.)

Don't let the small number of items at this level fool you! Both of these tenets subsume and require shifts in SO MANY aspects of institutional culture if they are to integrate equity and be established at depth and in a lasting way.

Let's take a look at the first tenet—***Institutions with Diverse and Inclusive Cultures***—and the idea that this prepares organizations like this to partner externally with non-dominant culture organizations. An impediment to embedding equity that we have seen here **is that many of these organizations have not sufficiently examined the power and equity layer of their own cultures** and, even if they are diverse or inclusive, there is often unexamined adoption of other aspects of white dominant culture that create barriers to external collaboration.

Sheryl: I would add that those "unexamined aspects of white dominant culture" **create barriers to _both_ internal as well as external collaboration**. To the points we discussed above, typically non-dominant people have to assimilate heavily in order to be successful in white dominant culture organizations. Their/our ways of being that do not conform to dominant culture norms are misunderstood (at best), or are seen as not valuable, distractions, disruptive, rocking the boat, too angry (at worst), or simply incomprehensible to those who don't have the benefit of cross-cultural literacy or lived experience that would help them understand what we're trying to communicate or simply how we are being... We have many examples of this from our client work together.

Mark: Yes, a theme across many of our clients is that the nature of social justice work itself and the predominantly white leadership often found in these groups fosters an internal culture of unexamined urgency and chronic overwork—a culture almost everyone feels they have to accept to be seen as successful or worthy of promotion.

The negative impacts of this culture fall especially hard on any staff of color and staff with other non-dominant identities.

Internally, the organizational cultures of overwork, the unrelenting pace, and privileged position of white leadership often keep leadership from inquiring how best to support staff in this hostile external environment, which leads many staff of color and other non-dominant-identity staff to suppress voicing their needs or organizing to get them met. Externally, the culture of urgency and overwork also limit the time for important strategic questions related to equity.

Sheryl: Yes, to be clear: there are moments (many of which are right now)—when "urgency" of some types is necessary; but are we *deeply* in touch with ourselves and our center well enough to grok how to *be* in those moments, or are we on auto-pilot, and (as you say) moving in "unexamined" urgency...

Let's discuss **pathways forward for this first tenet including developing skill in power analysis** and applying that to one's own organization, partnerships, and networks. But many "diverse and inclusive" organizations have not sufficiently reckoned with internal power dynamics and inequities, and carry this lack of awareness into external "partnerships" and attempts at systemic problem solving; which as you said, Sheryl, undermines internal and external collaborations. "Diversity and inclusivity" are necessary but not sufficient aspects of equity.

Sheryl: I'd also include in this pathway forward: *undertaking comprehensive, organization-wide equity transformation work with skilled consultants and leveraging equity expertise from internal staff and board.* Embedding equity is a complex process of change (which Change Elemental does a lot of these days). **So many organizations have recognized the importance of undertaking a deep journey toward healing and transformation from an equity perspective.**[26]

These efforts are well beyond the "diversity trainings" of the past and even "inclusion" efforts, and include—when they work with us or with consultants like us—deep examination of the internal and external culture, processes, systems, structures, norms, habits, programs, communications approaches, approaches to partnering, HR, and financial investment, as well as other aspects of institutional functioning from an equity perspective.

While there are an unprecedented number of organizations undertaking deep equity work now,[27] with a range of consulting (and other kinds of) support across the country,

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[26] Suarez, Kerrien with Ericka Hines. *So You Want to Hire an Equity Consultant - Part 2*. Equity in the Center, 2019. https://www.wokeatwork.org/blog-all/so-you-want-to-hire-an-equity-consultant-part-2

[27] See for example: McGhee, Heather, Lucy Mayo, and Angela Park. Demos' *Racial Equity Transformation: Key Components, Process & Lessons*. Demos, 2018. https://www.demos.org/sites/default/files/publications/Racial_Equity_Report_.pdf; and

Poblano, Lupe. *Putting Racial Justice at the Heart: How did CompassPoint Get Here?* CompassPoint Nonprofit Services, 2019. https://www.compasspoint.org/blog/putting-racial-justice-heart-how-did-compasspoint-get-here

systems change actors who are _not_ deeply doing this work in their institutions will be perpetuating, and perhaps exacerbating, old habits that ignore how power, privilege, race, and other areas impact their ability to achieve the depth of their missions, with sustainability.

Mark: Yes, and to your earlier point, since so many progressive organizations have yet to apply an equity-informed power analysis to their own internal dynamics, they are, at best, missing the opportunity to affect the hundreds, thousands or, in some cases, millions of people their work impacts externally. At worst, they are replicating inequity and doing damage in these broader spaces. I am curious, Sheryl, what your thoughts are about why so many people are not doing this critical work when it would serve them, their organizations, their missions, and our systems so well to do it?

Sheryl: The hard aspect of this truth, from our experience, is that there is no longer an excuse for not knowing deep equity work is necessary. While we _do_ find that organizations don't understand the _depth, intensity, and investment_ (of time, money, energy, emotional labor, etc.) that this work will take until they begin it in earnest—given the unprecedented visibility of equity and its impact on society, many white liberals (I have to say) can no longer say they "didn't know." If deep equity work isn't being undertaken, we have to ask, "What else is going on here?"... We have to ask as a field, _what is this avoidance about_?

The other thing I think about when I look at this area of systems change and the proliferation of organizations coming to us for organization-wide equity work, is that there are at least four (or five) layers: **_diversity, inclusion, equity_ and _social (or racial) justice,_ and _liberation_**. These are **different things that are often getting conflated.**

White liberal systems change actors who are still avoiding doing their own deep equity work—at internal/individual levels, interpersonal, institutional, and then applying that to their systems change work—are perpetuating a level of harm that is exacerbated because of the dramatically increased level of awareness and consciousness across the field of social change over the last few years. Of course, one could say, it's what it has always been about: guilt, fear, confusion, etc.[28] This goes back to the **inner work** piece we talked about earlier, and the need for some deep reckoning as well as supports to excavate when we continue to hide, avoid, ignore, _and then make excuses to justify_ our behavior. In one of my spiritual traditions, there is a saying that means: **once we know, then we have _responsibility_ for that knowing _that we did not have before, when we were innocent._ This is the case now.**

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[28] Sue, Derald Wing. _Race Talk and the Conspiracy of Silence: Understanding and Facilitating Difficult Dialogues on Race_. Wiley, 2015; and DiAngelo, Robin. _White Fragility_. Beacon Press, 2018.

The awareness of equity "issues" has increased so dramatically since the expanded visibility of killings of Black and Brown people, Indigenous women, and LGBTQ people and with the election of the current president. If we are still running from the deeper level of work _that has always been called for, but now the harm is more visible to all,_ then can we really call ourselves systems change people or those authentically desiring social change? I think no, if we are wittingly perpetuating the problem.

Mark: In my experience with lots of white liberals, and also white progressives and self-defined white radicals, including my younger self, there is a level of "willing ignorance" about the pervasiveness and perniciousness of systemic inequity—especially anti-Black racism—that is denied or avoided. And it goes back to the entrained "numbing" we've discussed, the threat that un-numbing poses to our desire to be seen as "good," as well as the mistaken belief that, "because I understand and may have experienced _one_ form of oppression (e.g., homophobia, sexism, anti-Semitism, class bias, etc.), I understand other forms of oppression." At another level, letting go of the vise-grip of white dominant culture within institutions is experienced by some white progressives as an existential threat to their long established ways of doing things and to future career prospects.

Sheryl: This calling out and calling in is an _act of love_ for our fellow humans who are journeying. These times—as all times of great strife do—call us into _our very best selves._ The time for excuses is over (if ever there was a time for such things). Now more people KNOW people are dying as a result of equity NOT being embedded in systems change efforts. The famous systems change actor who I requested to _at least_ mention equity in his joint presentation with another famous, white man systems change actor—when (as far as I could tell) he wasn't going to include it _at all_—was _negligent_ in not including it, _because he knew what I was talking about when I first said it to him._ In fact, while apparently mortified that I had called him on it, he said to me, "Well, we know those [equity] issues are at the heart of the matter anyway... They always come up..." So I looked at him like, "Then, why aren't you planning to mention this?" He didn't offer an answer.

Maybe it's because some or many of these actors _don't know how to adequately address equity_ deeply in their systems change efforts. To this I say, once again: _**Be brave; lean more profoundly into Inner Work practices; undertake significant equity training; practice these new skills**_ (with openness to being corrected/refined); and **PARTNER** _with the deep, long-time, equity-based systems change actors who are people of color, women, and other non-dominant groups,_ to learn, share, leverage, and give them the limelight.

I see **token and cursory partnering** all the time—like, "I have someone on my staff or my board, or my friend...who I 'partner' with." But what we observe in these actors is that _their methods haven't been fundamentally impacted, nor have they changed their foundational stance and tack when engaging in the field._ There is often no real humility, which requires one to _not_ be self-effacing, but to _bring one's own expertise AND share_

in/partner with/leverage the expertise of those who have been and continue to be marginalized and denigrated, so that they garner the publishing, funding, leadership, visibility, etc. that those in dominant positions have enjoyed. This is the role of a real ally/accomplice.

The question is, *Is this really what these systems change actors want to be?* And if they don't, (pardon me) are they willing to move out of the way and share their labor, connections, expertise, and resources in some other ways, so that those of us who DO want to partner authentically can get about our business more fervently *without their headwind in our way?* This requires **courage.** We're talking about supporting the liberation of as many people as possible (hopefully all), as well as the planet.

This calling out and calling in is an act of love for our fellow humans who are journeying. These times—as all times of great strife do—call us into *our very best selves*.

Mark: And again, these perceived (but mostly phantom!) challenges to dominant ways of being and to one's status in the field and one's career prospects highlight how important the **inner work** piece is. Unless more of us are willing to do the deep work, despite good *intentions,* the *impact* will be continued system "change" that doesn't actually change systems, and lost opportunities for more trusting and impactful collaboration across difference. It may be difficult, as it has frequently been for me, for some readers to really take in what Sheryl is raising and asking of us here. My long-term partnership with Sheryl has challenged my comfortable self-conceptions and positioning innumerable times, and I often do not initially understand or welcome it. But I also would not trade this learning and growth for anything.

Sheryl: Let's talk about the second area under the **INSTITUTIONAL** section that we're still currently in, ***Shared and Distributed Leadership.*** Deep Equity already does this. Some of the frequent reasons why leadership is not shared, or how leadership is shared and distributed, has to do with conscious and unconscious beliefs about who is "competent" and "skilled" enough to "lead," what "leadership" is (e.g., command and control, more facilitative and collaborative, etc.); and that how non-dominant people often express our leadership qualities *is not recognizable to those with limited cross-cultural literacy, so we are frequently misinterpreted as not being skilled* (or being too direct, etc.).

This connects to often unconscious beliefs about **assimilation** and the conformist approaches to "leadership" that dominant culture actors who are not cross-culturally

literate expect everyone to demonstrate. So, we are **constantly having to prove ourselves** (as worthy, skilled, competent, "articulate," etc.) <u>and</u> are typically **expected to do so in widely accepted *dominant culture forms.***

Too often, white social change actors who haven't done their work around equity want to focus on our "universal" humanity, while ignoring racial, gender, and other aspects of identity (especially racial, in the United States). The notion of "heart, mind, and will" is new for some social change actors, and *core* to the work of many non-dominant social change actors. I'm reminded of Fannie Lou Hamer, john powell, and others whose work is out of *love: a deep and radical devotion to awakening the humanity of everyone, WITHOUT erasing aspects of our identities and culture that shape our experience of the world.*

This *erasure* is hurtful (as we've talked about before), damaging, and *invisibilizing* of our innate humanity. I've worked with many white people who say, "I was raised not to see difference and seeing it seems divisive." So they have fear and anguish about how to BOTH see difference AND our fundamental shared humanity at the same time. *This is a <u>developmental stage</u>* of being able to do BOTH that we *all* as full humans need to get to.

The IDI (Intercultural Development Inventory and its Continuum) typically does a decent job of this by myth-busting the illusion of "color-blindness" or "melting pot" consciousness as the "promised land" of intercultural development.[29] While it is not a tool for "equity" per se (because it focuses more on the "diversity" and "inclusion" levels of capacity on the "DEI" continuum), the tool (perhaps like others) notes that what they call "Minimization" is a *stage* on the way to further development and capacity to both *see* and *engage* with all kinds of cultural differences skillfully, *without erasure.* It behooves any genuine systems change actor to do this work.

Mark: My own learning, from working for years in both white and POC-led organizations, is that there are so many different and effective ways to engage people and resources to achieve a shared purpose. And as someone with identities in multiple groups that have dominant social and political power in this country (white, male, cisgendered, straight, able-bodied, etc.), I am continually having to confront my own assumptions and habitual ways of being and doing in order to truly see the opportunities and gifts of the ways of so-called "others." I remember vividly the first time a Black boss of mine told me it was fine to not meet a deadline I'd committed to. Meeting that deadline would have meant serious neglect of my well-being. She said, "You can't get blood from a stone. Take care of yourself." I cried, from a place of deep recognition of my decades-long internalizing of the white dominant habit of disconnection from spirit and body, and of the loving stance offered by another that I had been unable to offer myself. The insight and space created by my boss was

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[29] For more information, see The Intercultural Development Continuum: https://idiinventory.com/generalinformation/the-intercultural-development-continuum-idc/

an unforgettable gift that opened me to the value of suspending my own dominant culture habits in order to partner differently in ways that benefitted not only my own sustainability, but my openness to learn and grow in cross-cultural partnerships.

Sheryl: A lot of these solutions in my mind have to do with authentically connecting and partnering with Deep Equity communities of practice—in ways that are healthy power relationships—so that CompSy folks (from the story/vignette earlier) without or with limited equity understanding and practice CAN LEARN. Of course, the notion of **what "authentic partnership" means and will take, given the history of mistrust, "woke Olympics," co-optation, repeated amnesia, power-hoarding, etc., will need to be addressed**. This cannot be overstated. Then again, maybe I'm being unrealistic.

What I mean is: Deep Equity folks have known *for a long time* that authentic partnership was necessary and not happening by and large. We have been singing this song for awhile, so **why say it again now?** Given the proliferation of systems change efforts and the visibility of equity, it's time to say something *yet again* before the field (*once again*) gets too ahead of itself. There is A LOT of scrambling going on right now as equity work becomes "sexy," on the part of white field **leaders needing and trying to show their equity chops. This is due to pressure from funders, constituents, communities, and would-be partners** (and sometimes also internally driven). Because of this, a level of "checking" is called for. What I mean by "checking" is the vernacular: *naming and calling out* harmful behavior. This can also be done to call folks in, but we all have to do our work, and right now, some of our colleagues are (doing their own work) and some of them do not seem to be… This is my point.

Mark: And some who think they have done their work are realizing the work doesn't end, but only deepens. The good news is that I think there are increasing numbers of willing, authentic, potential partners who are increasingly aware of the stakes and the damage being done, even if they are still in the process of needing to learn what authentic partnership really looks like...

Of course, the notion of what "authentic partnership" means and will take, given the history of mistrust, "woke Olympics," co-optation, repeated amnesia, power-hoarding, etc., will need to be addressed.
This cannot be overstated.

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While there are an unprecedented number of organizations undertaking deep equity work now, with a range of consulting (and other kinds of) support across the country, systems change actors who are <u>not</u> deeply doing this work in their institutions will be perpetuating, and perhaps exacerbating, old habits that ignore how power, privilege, race, and other areas impact their ability to achieve the depth of their missions, with sustainability.

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Levels of Deep Equity Work	Current Tenets of Systems Change With a Limited or Absent Equity Understanding & Practice
Individual	At the **Individual Level, Systems Change** requires: 1. Expansive Perspective Taking 2. Mental Model Agility 3. Specialized Tools to Perceive Systems
Interpersonal	At the **Interpersonal Level, Systems Change** requires: 4. Social Network Building 5. Quality of Presence and Listening
Institutional	At the **Institutional Level, Systems Change** requires: 6. Diverse and Inclusive Institutions 7. Shared and Distributed Leadership
Systemic/ Societal	At the **Societal Level, Systems Change** requires: 8. **Engaging Key Stakeholders:** Including those with needed resources, those with decision-making power, and the people most affected by the issue. 9. **Shared View of Current Reality and System Dynamics:** Including events, forces, power dynamics, underlying assumptions, and mental models. 10. **Shared View of Desired/Emerging Future:** All stakeholders contribute to shared vision, outcome metrics, core strategies, and roles. 11. **Experiments in the Direction of Shared Future:** Iterate toward shared future, changed power, and causal relationships, via continual learning and adaptation. 12. **Transformation of the Nature and Quality of Awareness, Listening, and Consciousness:** Help stakeholders, together, see the whole system, shift mental models, develop more inclusive levels of understanding and connection, and co-create systems for everyone's benefit.

SECTION 4:
The SYSTEMIC/SOCIETAL Level of Deep Equity and Systems Change

Mark: Well, for our final level, **SYSTEMIC,** there are **five aspects** (or basic tenets) I thought about from our conversations:

- **Engaging Key Stakeholders:** Including those with needed resources, decision-making power, and the people most affected by the issue. (But definitions and enactments of resources, power, and engagement are often structured to benefit dominant culture groups.)
- **Shared View of Current Reality & System Dynamics:** Including events, forces, power dynamics, underlying assumptions, and mental models. (But the role of racism, white supremacist thinking and structures, and entrenched privilege are almost never mentioned.)
- **Shared View of Desired/Emerging Future:** All stakeholders contribute to shared vision, outcome metrics, core strategies, and roles. (But impact measures and what are seen as valued resources are often limited by dominant culture frames.)
- **Experiments in the Direction of a Shared Future:** Iterate toward shared future, changed power, and causal relationships, via continual learning and adaptation. (But will fail if previous steps are not informed by Deep Equity perspectives, especially if those experiments are bypassing the need to authentically face cultural divides and intergenerational harm before looking to the future.)
- **Transformation of the Nature and Quality of Awareness, Listening, and Consciousness:** Help stakeholders, together, see the whole system, shift mental models, develop more inclusive levels of understanding and connection, and co-create systems for everyone's benefit. (But ignoring the role of institutional oppressions that give rise to—and are reinforced by—the mental models, or underestimating the depth of inner work and racial healing needed for such collective transformation, will not result in adequate systemic change.)

Sheryl: These are so intertwined and impact each other… Before we start, I just want to say how much I LOVE this list! It took some time to come up with a succinct list of areas that seem to be the hallmarks of approaches to systems change. The previous three layers are necessary scaffolding to be able to get to this last layer, which may be most familiar to systems change actors.

The issue with these basic tenets is that the *devil is in the details.* On the surface, they seem right and may even look great, but when you try to implement them without a well-developed approach to equity, this is where the trouble and considerable damage comes in.

And it is precisely because these areas look so "wonderful" on the surface, and are an evolution in thinking for some in the systems change field (particularly those without or with limited equity understanding and practice), that some may balk or resist knowing that critical aspects are missing for implementation that won't damage human beings and the environment… (I would refer the reader again to the **final table** at the end of this document, which summarizes not only the basic tenets, but the implications for embedding equity and pathways forward.)

Mark: I agree. This is the very point we wanted to talk about in this piece: that some of the best-looking and best-sounding models and approaches cause damage when implemented with an insufficient equity perspective. For example, the **first tenet** under the **SYSTEMIC / SOCIETAL** level of systems change, *Engaging Key Stakeholders,* is often said to include anyone influencing or affected by the system or problem being addressed—including those with *formal* political power or access to material resources, people who are directly impacted by the issue or those who say they represent such folks, and people on the margins of the formal systems of political, economic, or decision-making power and who are and will be impacted. On the surface, this sounds terrific. But impediments to equity arise when one digs deeper to find approaches that take **an *"inclusion and diversity"* perspective rather than an *"equity"* perspective on what it means to "engage."**

Sheryl: The term "those most marginalized" is dominant culture centrist in its intimation of **who is at the "center" vs. the "periphery."** What shows up as **"periphery"** often ignores race. Which groups are in which camp is a matter of *perspective* (to some degree)… I'm back to the "power solution" of **authentic partnering to *expand* and somewhat "blow out" the notions of center and periphery…**

Mark: Again, authentic partnering is so key. Another impediment to equity in engaging key stakeholders is that "**resources**" are often defined as professional expertise, money, and a requisite level of existing political power. This excludes organizations whose resources are experiential knowledge, latent political power, or political power that is deemed a threat to dominant institutions' decision-making or cultural prerogatives.

Sheryl: I kind of agree with this, but I would offer a few qualifiers. Many of the tenets listed under the **SYSTEMIC/SOCIETAL** level are core to so-called "collective impact" approaches, and approaches that are "collective impact" in nature but don't use that term to describe their work.

I also want to make sure we don't give the impression that non-dominant people don't have "**professional expertise**" and only or primarily have "**experiential" knowledge**. We're talking here about "**who has a right to be at the table,"** and in what *roles*, and what *value* we think they're bringing.

I do think that non-dominant people tend to draw on and acknowledge the presence and value of experiential at least as much as and sometimes more than dominant ways of knowing, but *we also* have professional knowledge (as of course you know), but we have to name unconscious elephants that some readers may have. I (and I suspect many others) have had the experience where dominant culture people (often men and white men), assume consciously or unconsciously, that "expertise" for non-dominant people is pigeon-holed into more "experiential," "affective," "artistic," "spiritual," etc. areas. These areas of expertise are all _very_ important, but we need to be careful to not unwittingly stereotype people, or give the impression that dominant culture people don't *also* have these skills and experience. We all have to be cautious not to create these "exoticizing" binaries…

Dominant culture approaches often **narrow** notions of "intelligence" and "expertise." Deep Equity ***expands*** these notions, and can recognize *multiple forms of intelligence and expertise in **different types of packaging***—sometimes with various forms of "training" and sometimes from lived experience, or both. Deep Equity doesn't privilege particular forms of "trained expertise"—it (further) might not consider such a "trained" person an "expert" if they don't _demonstrate_ **actual equity-based intelligence.**

That dominant culture privileges particular forms of "training" and "expertise" without deep examination of ***actual capacity to be of help to and in skillful, humble partnership with multi-identitied people who are differently powered***—from an equity-perspective, lacks a fundamental form of intelligence and is therefore _very_ dangerous.

Such an analysis is not distinguishing between **limited knowledge**, and **more expansive knowledge**, and ***the differential ability of such different types of knowledge to be of benefit*** in the world. This is one of the *main* problems in dominant culture approaches to Systems Change…

Mark: This leads us to an additional solution to integrating equity into this area, which is that *resources and decisions need to be made by communities most affected by injustice*. **Systems change efforts need to *redistribute and rebalance power*, and communities need to be part of meaning-making and decision-making, rather than simply being "informed."** This includes providing communities with the funding, training, and information needed to make decisions that serve them.

Sheryl: While this is previewing our third area that we'll discuss under the **SOCIETAL/ SYSTEMIC** level, I would add to this that (as many have said) communities most impacted **need to also be defining and assessing *impact.*** I want to further underscore that "communities" *already* have this knowledge and information, and they also **sometimes need *some* forms of training, *which are different than the forms of training and information* that dominant culture folks need.** Although we haven't yet said it, the type of "training and education" that dominant folks need should sometimes be as *formalized* as that needed by some non-dominant community members.

Again, this is the level of assumptions that I've often seen happen in dialogues like these, i.e., that non-dominant folks need "training"—as if we're not bringing intelligence, gifts, resources, knowledge and wisdom to the table… and that dominant actors are in the "benevolent" position of "transferring" their knowledge, "sharing" their "power" or otherwise giving "generous" "handouts" to non-dominant folks who have been "so lucky" as to have been "invited" to the table, and "supported" to be able to participate effectively. This absurdity continues to be offensive and is the kind of unconscious and semi-conscious patronizing that makes equity-embedded systems change efforts in multi-racial, multi-identitied communities and efforts so hard. Because many dominant culture folks are often so unaware of their biases, they feel shocked, dismayed, and sometimes hurt when those biases are pointed out to them, as if they are offended because they were just trying to be "good" people. As Verna Myers said in her TedTalk, "stop trying to be 'good' people and start being *real* people"… [30]

Mark: Some other remedies I think about for these tendencies are s*hifting the role of power from reinforcing systems of injustice to sparking equitable change.* This approach would be grounded in an understanding of how white supremacy, genocide, and patriarchy have shaped systems and structures to perpetuate inequity. This strategy assesses who or what has power and how we **build, redistribute, and share power** to disrupt systems and create them anew and prevent systems from resetting…

Regarding the point you raised about communities most impacted being engaged in "successful impact metrics, strategies, and clear roles," failure to acknowledge and deal with the emotional and cultural health of the overall system means that conditions for authentic participation by lower power participants will not be established.

Sheryl: I have a comment here. One, I just want to note that "lower power" is not accurate. People and groups are "**differently powered**." This goes back to the recognition that, if a way of being or doing doesn't conform to dominant culture ways of understanding power and influence, it is too often not perceivable or seen as "lower" or "less than." This is a corrective to that thinking…

Dominant culture approaches often narrow notions of "intelligence" and "expertise." Deep Equity expands these notions, and can recognize *multiple forms of intelligence and expertise* in different types of packaging.

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[30] Myers, Verna. *How to Overcome Our Biases? Walk Boldly Toward Them.* TEDxBeaconStreet, 2014. https://www. ted.com/talks/verna_myers_how_to_overcome_our_biases_walk_boldly_toward_them

Mark: Yes, differently powered! I apologize…

Sheryl: We have to provide for adequate skill and time to cultivate the health of the system—including **healing from past conflict and trauma between groups in the system, and developing the capacity to deal constructively with emotions of all members of the system as they naturally emerge**, including pain, denial, anger, guilt, fragility, etc…

Mark: Yes, and what we have learned is that conditions for authentic engagement (not just "participation") by differently-powered participants often will not be established due to **unexamined, dominant culture assumptions and practices on the part of those with formal convening power** about a huge range of things, including:

- Logistics and availability for meetings related to employment, transportation, what spaces feel "familiar" or safe;
- Language barriers;
- What constitutes "expertise," knowledge, or wisdom, and assumptions about the presence, lack, or nature of these in communities of color (and other non-dominant communities);
- Lack of awareness of and value for non-dominant and non-white ways of knowing, being, and doing and the full range of white dominant culture characteristics;[31] and
- Unwillingness or inability of people—(primarily dominant culture actors who perceive themselves as having the most to lose)—to question and challenge the underlying premises, and more importantly, the actual operation of the key systems of oppression from which they knowingly or unknowingly benefit (e.g., white nationalism, racism, misogyny/gender, neo-liberal capitalism, etc.).

Sheryl: Yes, and I would add to this: failure to acknowledge the emotional and cultural health of the whole system.

Mark: Thank you. As we close out this tenet, I'll just summarize the pathways forward for ***Engaging Key Stakeholders*** again:

- **Resourcing and reinforcing decisions made by communities affected by injustice.** This means that Systems Change efforts redistribute/rebalance power in such a way that communities are fully engaged in planning, meaning-making, decision-making and defining, and assessing impact throughout, rather than simply informed or brought in part-way through the process.
- And (as you have mentioned so often), ***authentic partnering*** so that the initial convening group itself is as close to fully representative as possible and has the capacity to skillfully engage individuals and groups whose ways of being, knowing, and doing are different from and can complement that of the dominant culture members.

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[31] *White Dominant Culture and Something Different.* Adapted from Tema Okun and Kenneth Jones. https://www.cacgrants.org/assets/ce/Documents/2019/WhiteDominantCulture.pdf

In terms of the second tenet on our list for this **SYSTEMIC/SOCIETAL** section, *Developing a Shared Understanding of Current Reality and System Dynamics,* the common approaches to embedding this in Systems Change efforts include: A) establishing a **common ground of understanding** (including events, changes in key indicators, critical pressures, policies and power dynamics, underlying assumptions, and mental models); B) **systems mapping**;[32] and C) clarifying the kinds of results and futures the current system is leading to. In the absence of equity perspective and skill, an authentic, shared understanding of the current reality and systems dynamics will not emerge due to all of the impediments to full engagement listed above. In addition, in my reading of **current approaches to systems change (without equity embedded), the role of racism, colonialism, genocide, and white supremacy in shaping economic and political realities, in America especially, is typically not made central to systems analysis at political or cultural levels.**

Sheryl: "U.S."—not "America." Sorry, this erases the other countries in North America, as well as Central and South America which are "Americas" also!!!

Mark: Yes, thank you again for that. We fall into our old habits so easily! They are ingrained… We have to re-train ourselves out of them…

We've often talked about how **systems theorists and practitioners who ignore or do not go deeply enough into the fundamental construction and workings of systems of oppression and the history of these systems cannot claim to be developing an authentic shared understanding of the current situation.** Systems thinkers' analytic tools (e.g., systems mapping, polarity maps, iceberg models, Theory U, etc.) could be more powerful—in addition to other ways of knowing—but many systems actors often fail to use these tools to truly **excavate and illuminate root causes** at individual, interpersonal, institutional, and systemic levels, and to reach the level of awareness, empathy, and openness to other perspectives needed to bring deep equity, especially racial equity in the United States, into the situational assessment.

Sheryl: In the U.S., **the absence of a race-aware perspective is colossal in systems change efforts and in the use of systems change tools, and the damage is extreme.** The gravity of this cannot be overstated, and the typical corrections attempted by dominant culture actors in years past (and recently) have been inadequate (at best) and at worst, have caused *more* harm… There are corollaries regarding other aspects of identity in the U.S. and also in other country contexts (i.e., gender, immigration status, LGBTQ identity, etc.).

Mark: Yes, and as we've talked about a lot over the years, **systems change theorists exhibit *"diversity & inclusion"* logic, not *"equity"* logic** when they:

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[32] This is one of many possible examples: http://systems.geofunders.org/systems-resources/systems-mapping

- Prioritize mental models and levels of consciousness as the deep source of poorly performing systems—and **underplay the economic, political, and social power and interests that give primacy to mental models that privilege whiteness, maleness, and property ownership** over the concrete structural interests of other groups;
- Fail to agitate participants deeply enough to **look fearlessly at history, root causes, benefits of the current system** to oneself, and what will truly be needed (including sacrifice of often unexamined privilege on the part of dominant culture actors) to up-end underlying structural power dynamics; and
- When they fail to take participants on a *deep enough* inner journey of awareness and "un-numbing" (to use your term, Sheryl) to the experience of others and of confronting our own fears, unhealed parts, self-interests, zones of comfort and familiarity, cynicism, etc.

The fundamental trap of systems thinking is the **impulse to get too quickly to the desired future without going deeply enough down into what you call "reckoning" and awareness required for *true* open heartedness, and the un-numbing and empathy this requires.**[33]

"...[S]ystems theorists and practitioners who ignore or do not go deeply enough into the fundamental construction and workings of systems of oppression and the history of these systems cannot claim to be developing an authentic shared understanding of the current situation."

Solutions to this area include ensuring the following forces, which are visible through significant equity understanding and practice, are included in the formal analysis and mapping of system dynamics and archetypes. These **often unmentioned forces** that need to be made VERY vivid in systems mapping efforts include:

- The practices and dynamics of institutional and structural racism, and their intersection with structural, *economic* oppression, and *misogyny*;
- The major elements of white dominant culture; and
- Assimilationist behavior.

Sheryl: Not mentioning or minimally addressing structural and institutional racism in U.S. contexts is one of the *most egregious* aspects in some approaches to systems change in my opinion. It is truly staggering. It hearkens back to the erasure and invisibility of race for so many white dominant culture systems change actors that we've talked about.

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[33] Sherrell, Carla and Judith Simmer-Brown. "Spiritual Bypassing in the Mindfulness Movement." *Initiative for Contemplation, Equity, and Action Journal*. Vol. 1, No. 1, pages 25-93, 2017. http://www.contemplativemind.org/files/ICEA_vol1_2017.pdf

Mark: Yes, it is staggering… A few **other solutions in this area** that we have discussed include:

- **Political and economic awareness building** – via engaging "multiple ways of knowing," storytelling, wisdom circles, academic analysis, everything! – to understand the deep workings of current structures of oppression. These approaches are key to understanding our current situation *and* to developing an equitable vision of desired/emerging futures (which we'll talk about next). This is the shift equity-minded people at organizations we've worked with are starting to make.
- **Using power to drive equitable change rather than to reinforce unjust systems**. Such an approach is grounded in an understanding of how white supremacy and patriarchy have shaped systems and structures to perpetuate inequity. Such a strategy assesses who/what has power and how we build, redistribute, and share power to transform systems and prevent systems from resetting into old, inhibiting patterns.

Mark: We're now ready to talk about the **third tenet** under **SYSTEMIC/SOCIETAL**, *Develop a Shared Understanding of Desired/Emerging Futures*. Going into this, let's distinguish between two somewhat different approaches to systems change— "*emergent models*," and "*collective impact*" approaches.

- **Emergent models emphasize:**
  - Alignment on shared vision, direction, boundaries, values.
  - Co-creating systems that address the well-being of all.
  - The belief that "new" ideas often come from people outside of—or on the margins of—dominant power structures.
- **Collective Impact models** (especially early versions of these), **emphasize**:
  - Alignment on shared impact metrics, shared strategies, clear individual and institutional roles.
  - Institutions with the resources needed to solve the problem are all engaged in defining impact measures.

Sheryl: There is SO much to say here! "Who's at the Table" (from *Engaging Key Stakeholders*), in what roles, and with what depth of authentic dialogue and relationships; notions of "periphery" and "center"—are all areas that need to be interrogated. We also need to **deconstruct the term "all" to understand differential** experiences, impacts, and solutions. There is a real need to **get *historical***, and ***specific***, **not generic**. We *cannot be a-historical* and embed Deep Equity with Systems Change efforts. **Targeted universalism is one, but not the only example of an approach** to getting "specific" as well as "general"…

In addition, **the meaning of *"metrics," "strategies," and "roles"* are *no longer* "generic"** when equity is embedded. Each of **these areas is expanded when equity is authentically embedded into systems change** approaches.

The notion of **"who's at the table"** is closely related to *impact metrics*. In terms of impediments to equity, **notions of "impact" are** *very often* **limited by dominant culture** frames. Such that, what is deemed valuable and worthy to measure as **indicators of "success"** exclude other measures that would allow more robust indicators of what we would like to see and be different as a result of our systems change (and equity) efforts.

I have often seen dominant culture people unconsciously assume that when these additional indicators are mentioned and offered as additions to existing, more commonly understood indicators that the additional metrics are being offered as *substitutes* or *replacements* of the more traditional ones. OR, that the "additional" measures are "watering down" and diluting the potency of the more traditional measures. I have seen this (usually) mild defensiveness regularly, where folks will say something like, "But we can't become irrelevant to our base or regular constituencies!..." Our response to this is always, "No one ever said that. Where did that come from?..."

People are usually unaware that they are creating such a *binary* in their thinking. **"Either/or" thinking is one of the core symptoms of dominant culture** (usually male and white) ways of thinking, perceiving, and reasoning. It is possible, and indeed preferable and *essential*, for BOTH types of measures—or a **WIDE range of measures**—to *co-exist* as valid in systems change efforts that center equity...[34]

In fact, it would behoove any systems change actors seeking to incorporate Deep Equity into their work to deeply familiarize themselves with the **habits of white dominant culture**.[35] The point is *not* that white dominant culture (or male culture) is "bad;" it's that white *dominant* (and male *dominant*) culture is **often unaware of, excludes, or denigrates other ways of being, knowing, and doing, such that it legitimizes its own approaches to the neglect (and often abuse) of other ways of being**. This limits our creativity, innovation, and recognition of the multiple ways that *wisdom* and intelligence can manifest itself. Some readers might take this as "beating them up" when that's not the intention here. The point is that, in order to *deepen one's capacity as a systems change actor who seeks to authentically integrate equity into their work, it is critical to significantly develop two things: 1) deeper awareness of and value for other ways of being, knowing, and doing, and 2) capacity to skillfully engage individuals and groups whose ways of being, knowing, and doing are different from and can complement your own.* In this way, we more deeply enter the human family of change actors who are committed to what Change Elemental calls love, dignity, and justice.

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[34] See, for example, Jara Dean Coffey's work on Equitable Evaluation: https://www.equitableeval.org.
[35] See: *White Dominant Culture and Something Different.* Adapted from Tema Okun and Kenneth Jones. https://www.cacgrants.org/assets/ce/Documents/2019/WhiteDominantCulture.pdf; and
Couchois Duncan, Aja, Elissa Sloan Perry and Natasha Winegar. *Practicing the Elements of a Liberating Ecosystem.* Change Elemental, 2019. https://changeelemental.org/resources/practicing-the-elements-of-a-liberating-ecosystem/

Mark: As you point out, Sheryl, all of the **impediments to equity** we've talked about in the previous sections will prevent ***Develop[ing] a Shared Understanding of Desired/ Emerging Futures*** as well as developing a shared understanding of the present situation.

Sheryl: We've also talked about **different kinds of "power"** and which kinds are typically recognized as valuable and legitimate, and which kinds are typically ignored or deemed "problematic"…

Mark: Some of the **solutions** for more deeply embedding equity in the development of shared futures and overcoming harmful patterns or habits are what you've written about, Sheryl, such as 1) love-fueled approaches to equity, and 2) the **non-dual nature of collective and individual liberation** as central to how communities of color tend to think about change. (We'll pick up on this more later…)

We also need to give attention to the **pathways forward** we've discussed above regarding ***Engaging Key Stakeholders*** and ***Developing a Shared Understanding of Current Reality and System Dynamics***. Implementing those solutions will fundamentally alter the nature of approaches to ***Desired/Emerging Futures***. Again, we refer readers to the summary table of these impediments and solutions in each area at the end of this document.

I want to lift up again here the **importance of acknowledging and authentically facing the past as part of healing.** Such reckoning and healing is critical for **developing the needed depth of understanding and empathy required for <u>true</u> open-heartedness**, which we'll talk more about in the next section…

Sheryl: I also want to point readers who may not be familiar with it, to adrienne maree brown's incredible work on ***emergent strategy*** for those who would like more information and approaches to the "how." She, her book, and the network of practitioners that are coalescing around these approaches, are powerful…[36]

I would also add that the type of ***"empathy"*** needed in Deep Equity **is not "generic." While it *does not dwell and cling* to the past, it *<u>also does not erase</u>* race or history.** These are two of the critical hallmarks of deepened equity capacity. This habit of **"erasure"** is a form of Minimization (as we've talked about previously), which is an insidious habit of white dominant culture. Such "erasure" inhibits our ability to be fully and truly human, and *feel/experience* the depth of our connectedness with each other; and this disconnection can be devastatingly sad…

Mark: As I sit with strong emotion, I am reminded that this is part of un-numbing, and it is critical. It is an important holding as we move into the **fourth tenet**, ***Experiments and Interventions in the Direction of a Shared Future.*** This can be a powerful aspect

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[36] brown, adrienne maree. *Emergent Strategy*. AK Press, 2017, and the Emergent Strategy Ideation Institute, https:// www.alliedmedia.org/esii

of systems change work, where we get to collectively iterate toward a shared future, changed power, and changed causal relationships through continual learning and adaptation.

While collective iterations are (or can be) powerful and inspiring aspects of moving toward a new, shared future, **such approaches will likely fail or fall very short of our vision if the previous steps we've talked about are not informed by a Deep Equity perspective—especially if there is bypassing of the need to authentically face** *cultural divide*s **and** *intergenerational harm* **before looking to the future.**

As we also noted previously, failing to center the role racism and white supremacy plays in shaping economic and political forces is a true impediment to embedding equity in a shared view as well as movement towards a desired future.

Sheryl: These patterns and habits are also relevant in **global colonization**… This is about **healing**…

Mark: Yes, frequently white writers will acknowledge *characteristics* they admire in an individual Black person (such as Michelle Obama's open-heartedness while fighting for what she believes in, or the ability of a Black mother to forgive the policeman that murdered her son) without acknowledging, or perhaps even understanding, that these women are shaped by their community and culture, and that other contemporary Black leaders and movements (for example, the Movement for Black Lives) also embody these characteristics.

Sheryl: Yes, omissions like these are truly staggering… We are at the very least *informed*, if not often *shaped* by our communities, cultures, and (I would add) local, national, and global **history**. **While we are not** *trapped* **by our histories, they have contributed to who and how we are now, which can be sources of joy, love, honor, warmth, learning, and value. These specifics also allow others to engage with us in the** *particular*, **and** *not only* **in the** *universal*. **Attention to** *both* **the "particular" and the "universal" are necessary for a fully engaged life and for Systems Change work**.

One habit of dominant culture (especially white, male) is to ignore or avoid the "particular" because it's too "messy." When we ignore this textured, vivid goodness, we cannot be fully present (which contradicts some of the stated tenets in these approaches to systems change, of what's critical and important)…

When I am reading much of the systems change work in the field now—while some of it is *very* good and helpful, there are some pieces I've read that have felt like "white fragility" and dominant culture defensiveness, of the sort Robin DiAngelo and others

talk and write about.[37] It is often truly sad and infuriating, and hence, some of our motivation to write this article to clear the lanes and promote the level of dialogue and reckoning that we need so that our work at the systems level is more impactful and truly liberating…

Some solutions to these habits of ignoring the impact of the past on the present include addressing **"spiritual bypassing"** (as we've noted in earlier portions of this article) in personal transformation work, and also noting that there are and can be **"love-fueled approaches to equity"** that you just mentioned. As we mentioned before, it's also important from an equity perspective to recognize the **non-dual nature of collective and individual liberation** as *central* to how communities of color and other non-dominant communities tend to think about change…

Mark: Yes, our liberation is tied to one another! This brings us to our **fifth tenet** of this **SYSTEMIC/SOCIETAL** level, *Transforming the Nature and Quality of Awareness, Listening, and Consciousness*. Typical approaches to systems change in this area (as we've said before) include:

- Helping stakeholders, together, deepen awareness of the whole system,
- Surfacing and shifting mental models, and
- Developing more inclusive levels of understanding and connection.

"…[S]uch approaches will likely fail or fall very short of our vision if the previous steps we've talked about are not informed by a Deep Equity perspective—especially if there is bypassing of the need to authentically face cultural divides and intergenerational harm before looking to the future."

This area is about being able to see beyond one's own viewpoint and making mental models visible and shared to all actors in a system. Some systems change actors using this approach ignore racism and other power dynamics **when they identify *mental models* (such as models of a society or economy) as deep sources of poorly performing systems. This does not *acknowledge the even more fundamental role power and entrenched interests (such as privileging whiteness, maleness, and preservation of private capital) play in giving primacy to some mental models over others.***

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[37] DiAngelo, Robin. *White Fragility*. Beacon Press, 2018.

Sheryl: This also reminds me of the need to **deconstruct the term "all" to understand differential *experiences, impacts, and solutions***, as noted above. No matter how eloquently stated, admonitions from systems change people toward co-creation are ***dangerous*** if we do not get **historical** and **specific**. It smacks of the **erasure habit** again…

Mark: Yes. **Underestimating the depth of inner work and racial healing needed for such collective transformation will result in inadequate systemic change…**

Sheryl: Yes, it's a bootstrap theory…

Mark: Such approaches underestimate, minimize, and devalue the depth—(to use your language, Sheryl)—of **inner work** and **reckoning** (e.g., with one's own internalized superiority or oppression; with individual, institutional, and structural elements of harm and abuse; etc.) needed to truly make the journey to Deep Equity. Such a journey can be *begun* in a couple of well-facilitated workshops or co-creation spaces, but to get to *real* depth and transformation of consciousness takes *much longer*…

Some **pathways forward and solutions** to these challenges to embedding equity in ***Deepening the Quality of our Awareness, Listening, and Consciousness*** include several solutions we've already talked about. The first is attending to the **"interior condition of the intervenor."**[38] This is nowhere more important than in dealing with equity due to the harm and human damage that can be done from a place of unawareness and unaddressed internalized superiority (or oppression). Many white people need to embark on a journey of significant inner work (such as reconnecting to sources of spiritual and energetic replenishment, developing the emotional strength to look squarely at our own complicity in racism, re-engaging with our bodies as a source of insight and knowing), in order to begin unfolding into greater levels of feeling and un-numbing. The greatest chance for reproducing harm and oppression comes from dominant culture group members who lack the necessary equity-informed inner awareness and presence. You've written about this in the *"Waking up to All of Ourselves: Inner Work, Social Justice & Systems Change"* journal article we cited. **Theorists, conveners, and facilitators who decide to operate in this space have a moral obligation to be on as deep a personal developmental path as humanly possible, and to know and acknowledge their own place on their equity journey, and to not proceed in their work beyond those limits.**

Sheryl: Yes, I've talked about this a lot. Thank you for mentioning it here. This is about the harm that *has been and continues to be done…*

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[38] Bill O'Brien, quoted in *Theory U: Leading From the Future as it Emerges*. Scharmer, Otto, page 27. Berrett-Koehler Publishers, 2009.

Mark: It can't be underscored enough. Let's talk about the next **pathway forward** you mentioned, which is about **developing adequate skill and devoting adequate time to cultivate the health of the system, healing from past conflict and trauma between groups in the system, and developing the capacity to deal constructively with the emotions of all members of the system as they naturally emerge** (pain, denial, anger, guilt, and fragility). Inner work at a deep and transformative level can include:

- Embodied approaches to healing from racialized trauma.[39]
- Equity awareness, reckoning, and skill development for white people—for example: history and the morphing of structural oppression of Black and Indigenous people in the U.S. from colonialism and slavery to Jim Crow to mass incarceration; the history of white violence against Black bodies; and the impact on white awareness, fragility, and related emotions of dissociation, denial, guilt, white embodiment, and healing from these, etc.
- Knowledge of history and owning one's own group identity is a key part of inner work, as it contributes to un-numbing, empathy, and open-heartedness.

Underestimating the depth of inner work and racial healing needed for such collective transformation will result in inadequate systemic change…

Sheryl: Yes. I've written in a couple of places about the differential learning and supports needed for dominant culture folks and people of color.[40] We all have to do our own work in this. Nothing less is required for us to collectively heal and create and expand the multi-identitied beloved communities that are possible and that are being cultivated and lived into, right now, in many places…

The other thing I'd like to mention in ALL of the "solutions / pathways forward" we've spoken about in this whole piece is that, those who undertake such pathways **do not (wittingly or unwittingly) engage in "woke Olympics"—i.e., using their *new-found* knowledge (from the Pathways Forward) to set themselves up as guides, which would be another misuse of privilege.** This behavior is rampant in social change communities who are just waking up to Equity (or to *Deep* Equity).

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[39] See for instance: Menakem, Resmaa, *My Grandmother's Hands: Racialized Trauma and the Pathway to Mending Our Hearts and Bodies*, Central Recovery Press, 2017; and Generative Somatics, https://generativesomatics.org/about-us/.

[40] Petty, Sheryl. *Ocha Dharma: The Relationship Between Lucumi, an African-Based Tradition and Buddhist Practice*. Movement Tapestries, 2016, p.122-174; and
Petty, Sheryl. "Field-Building, Equity and Transformation in Education: What We Can Do, How To Do It, and Who We Need To Be." *Educating for an Ecological Civilization: Interdisciplinary, Experiential, and Relational Learning*. Eds, Marcus Ford and Stephen Rowe. Process Century Press, 2017.

We *cannot* forget to note this *well*, lest the same behavior continue to repeat itself. One (of many, I'm sure) examples of this was from last year where there was an attempt by a *very well known* publication venue to create a webinar on "systems change and equity" with all white people as panelists.

Many of our colleagues in the field commented on this and it was changed. *But the fact that it happened in the first place is indicative of something insidious that keeps happening* and evinces lack of sufficient internal/personal and/or institutional work around equity…

Those of us seeking to be real systems change actors with equity embedded have to do our own work. "Mistakes" like this shouldn't still be happening in this day and age. Too much has been brought to the surface, and there are <u>too</u> many equity learning resources that folks can take advantage of, for it to still be happening to the degree that it is.

I wonder, **does the fact that such behavior keeps happening mean folks don't really wanna do the hard work? If so, don't. But then, *stop* using the language of "Equity," because such mis-use co-opts, waters-down, and confuses people who are actually doing (or are trying to do) the deep work…**

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We have to provide for adequate skill and time to cultivate the health of the system—including healing from past conflict and trauma between groups in the system, and developing the capacity to deal constructively with emotions of all members of the system as they naturally emerge, including pain, denial, anger, guilt, fragility, etc…

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FINAL REFLECTIONS

Here are some final thoughts and takeaways we would like to leave readers with…

Mark: So, we're wrapping up and here are some thoughts on a few fundamental takeaways from this article and our reflections:

1. **Power,** in all its forms and at many levels, must be explicitly explored, understood, and named as part of any Systems Change effort because:
   a. Equity is fundamentally about power and how it is cultivated, held, and used to advantage and disadvantage people based on group membership; and
   b. Privileged people, by definition, stand to lose that privilege once the true sources and consequences of their power are known. As a result, privileged people have generally not encouraged power analysis nor developed deep capacity for engaging in it.

Sheryl: I would add that equity is also fundamentally *caring* with an ability to see *specificity* (not just "generally"). **Inequity is about *invisibilizing the particular* and not paying attention to people and impact. It is about being *numb*.** So, core and _Deep_ Equity work requires and supports us to *un-numb*, and then to deal with the "sensations" and aftermath of that thawing. Because **once we become re- or newly sensitized, we have to deal with the avalanche of emotions, sensations, awareness, and reckoning that we have been avoiding, ignoring, or simply unaware of for perhaps our entire lives.** This is no small feat, BUT as people who are _truly_, *deeply* committed to helping to make the world a better, more sustainable place for everyone and the whole planet, nothing less will do frankly. (Isn't this what we signed up for?…)

I would also say that sometimes privilege or "benefits" are not "lost," but they are *shared*. This notion of "loss" is an interesting one, which comes from a *scarcity* mindset that we won't have "enough." We have to ask, "What is 'enough'? and What is 'too much'? What is 'satisfying, rewarding, joyful, and enriching,' and *how do we make that possible for EVERYBODY?*" **How do we become sensitive enough such that others' pain is as intolerable as our own, and our efforts (at work, at home, in our neighborhoods, in our hearts, and in our thoughts) become about *healing the collective*, because *that* brings *us* joy?…**

Mark: Yes! Along these lines, I'll add a second key takeaway from this article, namely:

2. **Personal transformation** among actors at multiple levels of a system is essential to:
   a. Achieving Systems Change of any sort, and especially
   b. Achieving Systems Change with Deep Equity embedded, and

c. Theorizing/conceptualizing about Systems Change from an Equity perspective.

Sheryl: I would **connect "personal transformation" with—and describe it as—the "inner work"** we talked about before. This is deeply personal work, while it is also about organizations, systems, networks, regional, national, and multi-national efforts. We are _people_ who have made systems and are interacting with natural/environmental systems.

So, yes to underscore this one: We can't get lost in scale and size, and lose the humanness, our deep, shared humanity, while we are ALSO specific, particular beings with histories, families, communities, cultures, and so on (so that we don't _erase, de-historicize and genericize_ each other, and lose the _tender particularity_ of our lives and our goodness…).

Mark: I wanna come back to that at the end and triple underscore it… But before that, let me mention a few more. One is:

3. **Without an equity perspective in action and theorizing**, systems change actors can only hope to:
   a. Shift from "_me_" to "_some of us_," and not from "_me_" to "_we_;"
   b. Achieve marginal gains in "diversity" and "inclusion," and in some limited systems outcome indicators, but without changing fundamental power dynamics (especially for those most harmed by the social order as it currently exists); and
   c. Re-create and deepen existing dominant culture and power dynamics, at worst, _or_ engage a greater variety of people in _assimilationist_ system change, at best.

Sheryl: I would add to "action and theorizing" to make it "action, **_analysis_**, and theorizing." **It's the _analytics_ of what we think is happening, _why_, and potential _solution pathways_ that are impaired in systems change work without equity embedded…**

How do we become sensitive enough such that others' pain is as intolerable as our own, and our efforts (at work, at home, in our neighborhoods, in our hearts, and in our thoughts) become about _healing the collective_, because _that_ brings _us_ joy?…

Also I want to underscore the notion of **"assimilationist"** strategies and approaches. We haven't talked about this in this article much but this is a HUGE, *gigantic, big area* that needs to be at least mentioned, but warrants its own section. The article we noted above from our colleagues at Equity in the Center has a great section on this.[41] **The too common mode of "including" multi-racial, multi-identied, or "diverse" people into institutions and systems change efforts often requires us to assimilate effectively in order to be invited, participate, or be seen as "credible" or "intelligent."**

This is often overt or subliminal (either on our parts or on the parts of those who invited us in). And many dominant culture actors (white people and men, in particular) *don't think anything is wrong with this*, because there is the conscious or unconscious belief that white and dominant culture ways of being <u>are</u> more "intelligent," "desirable," "articulate," "analytical," "thorough," "rigorous," or all the other buzz words that we know are often code for, "You are lacking something here, so I'm going to smile and nod and make you feel 'welcome' but I really think you're deficient, even though I don't want to…" (There is, of course, an **internalized oppression** corollary to this where non-dominant folks *also* think "assimilation" and erasure are good and desirable. Many of us have our own healing to do around this as well…)

This has to be interrogated in line with the **habits of white dominant culture** that we've already mentioned.

We again need to interrogate the notion of "loss," that when we "share power" somehow we are "losing" as opposed to everyone "gaining" the resources and supports for greater well-being, thriving, safety, stability, etc.—all the good things of life that many hands can build together. This "all-or-none" mentality, **binary "either/ or" thinking** is also an endemic habit of white dominant culture, and unnecessary.

One corollary to this habit is that folks will often say in the next breath, "So, you want everyone to share everything and for us all to be communal?" No, that's another example of "either/or" thinking. I want <u>both</u> shared <u>and</u> tailored/unique resources; I want everyone to have what they need to thrive and be of service to the well-being of others as well. These are not "either/or;" they are **"both/and" solutions**. This is how Equity thinks as opposed to solution-making without Equity embedded…

People will often get vehement, super-defensive, and angry with this comment and thought; again, *as if they are threatened*. It seems strange to some to want us to care for and support each other, and also sad that we have too few (readily perceivable*) examples of kindness that softens each other so that others can feel that the world really *does and can* support their well-being, as opposed to fear-based analysis and solutions. This speaks to your comment regarding moving from "me" to "some of us,"

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[41] Brissett, Leniece F., Kerrien Suarez and Andrew Plumley. *How to Retain Diverse Leaders in 365 Days*. Equity in the Center, 2018. https://www.wokeatwork.org/blog-all/how-to-lose-retain-diverse-leaders-in-365-days

and not "me" to "all of us" or (as my colleague Janice Jackson would say) "*each and every* one of us"… We need to come from a deeper base, a deeper source, a deeper well-spring of creativity…

Mark: Yep to all of this… We could keep going on from here, and we invite others into the discussion. For now, let's move to try to wrap up this article! Another key takeaway for us is that:

4. We need to also have **Systems and Equity work not written/popularized just by white people; getting the systems change field out of its privilege bubble.**
   a. The existing academic and "pracademic" literature on complex systems change has been largely written by people of privilege (mostly white, of Western European descent, with advanced degrees, and mostly men) recounting it through the life experiences, mental models, individual, and cultural perspectives that "naturally" occur in this small subset of humanity. The current impact of this is that:
      i. It invisibilizes decades of work on and experiential knowledge about complex Systems Change among communities of color, Indigenous, and other non-dominant groups and individuals—those with less access, funds, or incentive to publish for white dominant audiences. **It makes it look like white academics, philanthropists, <u>and</u> NGO leaders *invented* Systems Change in the last 15 years.**
      ii. This narrow set of mental models, including layers of unconscious bias and limited pools of research subjects informing the conceptualizing/theorizing, limits and makes erroneous concepts, models, and research conclusions…

Sheryl: …Concepts, models, and conclusions that don't come from authors and developers that look like or have the same "credentials" as those dominant culture actors, or (worse) it co-opts, re-names, and/or doesn't give credit to them when they are developed by non-dominant folks.

I would connect this to the "power solution" we talked about before of ***<u>truly connecting and authentically partnering</u>*** with communities of color, Indigenous, and other non-dominant communities who have been doing Deep Equity and Systems Change work for decades or centuries, to *learn from and be in a learner stance to them…*

Mark: Yup. Some additional impacts of this hegemonic writing and popularization by dominant culture actors are:

    iii. The **invisibility continues the cycle** of having it be white people whose ideas get seen/heard, who get paid for doing work based on their public sharing of ideas, and which individuals are seen as "smart" and contributing to the field, etc.

    iv. **Mental models and concepts** are given primacy over "people power" and the role of community organizing and non-electoral political pressure (both in social media and in complex change efforts) on **changing the concepts, mindsets, and mental models of academics, publishers, foundation philanthropists, program officers, and consulting firms**, etc. How often do formal accounts (in grant reports, journal articles, etc.) of "how systems change happened" ignore or invisibilize the pressure placed on those with certain kinds of power by those with different kinds of power to get the former to see what they could not see, engage with people they previously ignored, use more culturally appropriate processes dominant culture folks could have never conceived of alone, etc. These conflicts and exercises of organized power by non-dominant people are often not reported in formal accounts written by dominant culture people in a system change effort.

Sheryl: You'll note that when I was reading the draft of these takeaways, I (again) changed "more powerful" to "those with certain kinds of power," and "less powerful" to "those with different kinds of power." This is important to remember. When we are learning about how to engage those who have different access to influence, resources, etc. in systems change efforts and organizational transformation efforts, we are often taught to look at and see people in a **deficit-based** way, and **seeing only their "needs."** This is a hard habit that we have to be mindful to correct and be vigilant about, as its characterizing people as "deficient" and "defective" and in "need of help," which can lead us to a patronizing attitude and stance in our engagement, which is dishonoring of the wisdom and gifts that everyone has. This is not pollyanna-ish. It is noting *that dominant culture and white people have deficits and gaps too*, but we have _so_ prioritized and lauded their gifts that we have simultaneously invisibilized and denigrated, made comedic, or exotic and "unique" **the gifts of non-dominant people, because we are not familiar with them being engaged and leveraged *as wisdom and essential in change efforts*; not as "nice-to," "polite" "add-ons"** that we are doing because it's "right;" but because **we know *our efforts are deficient, defective, and likely harmful without this wisdom.***

This is the (or at least part of) the corrective stance to this habit… to put a finer point on your comments.

I would also add here that in recent years, there has been more interest, awareness, funding, support, etc. for organizing models and approaches. This is good progress,

but we still have a ways to go regarding comprehensive approaches to Systems Change, as we talk about in this article (a critical part of which is community organizing)…

Mark: Thank you for these important layers. Along these lines, continuing with the **impacts** of this hegemonic writing and popularization by dominant culture actors, here are some questions we are raising:

5. How many foundations take credit for "changing the public narrative" on an issue, without acknowledging the decades of effort by community groups, advocates, and previously marginalized thinkers/theorists to get these ideas seen and heard by those with greater formal power?
6. How often does the group membership of the **carriers of a new framing or narrative get overlooked** in explanations of why systems change was successful? For example, the fight for LGBTQ equality and for gay marriage is often hailed as an example of brilliant, research-based strategy for shifting a national narrative and policy. **However, in the narrative shift around LGBTQ equality and gay marriage, it was largely wealthy, white, gay people who were the most publicly visible, influential, and positioned in places where they were able to move certain conversations forward, and do so in a way that many others who had been a part of the movement had/could not. This matters hugely to the success of their movement. Can anyone credibly contend that low-income, Black lesbians would have been as successful with the same strategy?**

Sheryl: I have to jump in here with a Hallelujah Amen!! to that comment!! It is egregious that this lack of awareness keeps continuing!… This is when it is (or it *can* be) obvious that we are not just "all human;" **we are having both similar as well as *differential* experiences based on race (and other differences), and this matters when we're doing analysis and trying to develop systemic solutions**. Ignoring difference does not help, and is in fact radically harmful *when those differences - (as they so often do) - indicate vastly differential experiences, treatment, outcomes, and impacts*. I am saying what we all already know, **but if we "all already know this," why does it keep happening if we purport to be about 'deep change'??! This is the question.** Either this is deliberate, we lack courage, and/or this is selective attention and awareness (or some other reason I haven't thought of here). But we have to stop it!!…

It's like the "Eureka/Columbus" moments we talked about at the beginning of this article: People "discovering" things that already existed because now they are on their radar or it benefits them. This can also connect to the "woke Olympics" habit of many newly discovering Equity, to tout how much they have been doing and have done that is "just like" or very similar to the equity work of many for so many decades. We have to be careful that such professing is actually authentic (if it is!), and we have to stop this if it's not and if we really are interested in *deep partnering toward Systems Change*… (If we're not, there's no need to read this article…)

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> Ignoring difference does not help, and is in fact radically harmful *when those differences – (as they so often do) – indicate vastly differential experiences, treatment, outcomes, and impacts.* I am saying what we all already know, *but if we "all already know this," why does it keep happening if we purport to be about 'deep change'?!* This is the question.

I also want to note that we need to make sure we **don't give the impression that marginalized/non-dominant folks are *only* or even "mostly" doing grassroots organizing** (as critically important as this work is). I think this is not what you mean, but it may get obscured, so let's bring it out—i.e., that non-dominant people *are* analysts, theory developers, etc. too!! And this should hopefully be a "duh" for people, but for some people it may be surprising. This is back to, *what is perceivable and imperceivable and to whom…*

Mark: Yes, which leads to another takeaway…

9. **White people, and other people with certain sorts of privilege (including access to formal education, to economic security, platforms for voice, distribution channels for writing, dominant culture ways of knowing and expressing), should no longer be working, writing, teaching, coaching, or consulting within *privilege bubbles*.** Rather we should be collaborating individually and institutionally across multiple kinds of difference, and disrupting current patterns of power and un-thinking dominance in multiple ways (e.g., shaping fundamental approaches to joint projects; increasing visibility of typically marginalized participants in the work; opening doors, sharing contacts across social networks; using multiple forms of learning and expression, etc.).
    a. With this, the work becomes better (less parochial, less biased, less constrained by narrow educational and life experiences);
    b. Work and personal life becomes richer (the world expands; relationships grow; etc.); and
    c. The field becomes much better informed; more and more people can contribute.

Sheryl: Nowadays, especially since the last U.S. presidential election and the profoundly expanded awareness of equity across the social change space, there has been a considerable proliferation of authentic requests for deepening equity capacity among MANY social change organizations. These changes may have given those of us from non-dominant communities who have been in equity spaces for a long time, *a lot*

more gravitas, credibility, and influence over social change and systems change work than in the past, or at least the *possibility* of it. It is growing. This is a profound time for influence, because it has the much needed opportunity of making the work of social change and systems transformation better. It took the slaughter of so many Black and Brown people made public by social media, and the election of the current president (building on previous centuries and decades of work) to make this happen. That these horrific events have occurred and are catalysts is powerfully painful to recount. We have to do *so* much better… Those of us in the equity space are looking to influential systems change actors to get real with authentic partnership, **and** make room and take a *true* back seat (when needed) to those who can do more profound work with Equity embedded…

Mark: Yeah, so another core takeaway is...

10. **Doing all this (especially as white men with advanced degrees and lots of experience successfully writing for white dominant audiences) takes sustained effort.** I know because I am one of the people just described. It's hard because:
    a. We have well worn ruts and habits for generating ideas, producing papers, and getting them in front of people. No one (almost no one, anyway) wakes up and says, "How can I write a paper that is limited in its worldview by my identity and life experience (or by that of my collaborating authors)?" No, it just happens thoughtlessly by not having a fully embodied equity practice and understanding in this part of one's life. It's understandable to not recognize it without some prompting, but having recognized it, it's <u>not</u> OK to keep doing it!
    b. It takes sustained commitment and internal and collective work to wrestle with one's own biases, areas of unawareness, limited world views, limited capacities for empathy and compassion, willingness to challenge others like ourselves to further awaken and grow…

Sheryl: This is the core/heart of Equity (in my opinion): ***Deep Compassion***. That we actually have to ***feel one another in our pain*** in order to truly heal it. We cannot go past, around, over or under it. We have to go THROUGH it. This is how we get *free; collectively free.* Not just individually, free "for me" or "for my people" or "for people who look like, act like, feel like, talk like, are like 'me.'" This is the hallmark of Deep Equity in the way we mean it: ***A radical caring, that is not selective, but requires hard work of everyone, appropriate to our condition and circumstances in each moment***, building and growing and sharing our capacities… We need to be about it to heal this world, ourselves, and our social systems…

Mark: This leads us to our final takeaway from this article….the triple underscore of **Inner Work**…

Sheryl: Yes. This is connected as we said earlier with the takeaway above about "personal transformation." This is the heart of it; key. **Without personal transformation, equity remains shallow.** This is one of the primary impediments to embedded equity: inner resistance, rationalization, etc. because we (or dominant culture actors) think that we/they will lose something important or fundamental. It's not true; we ALL gain and "win" from embedding equity. The world becomes a better place, truly… This takes _bravery_ and courage…

Mark: So much bravery and courage...

11. The importance of **Inner Work** becomes glaringly evident for:
    a. Letting go of narrow mental models,
    b. Reducing the influence of ego-driven, self-oriented impulses that block systems change, and
    c. Developing the deep **compassion** necessary to:
       i. See others as companions on a shared path vs. "targets" or "recipients" of one's largesse or "help;"
       ii. Reduce the human habit of judging self and others, which undermines any authentic power-sharing or collaboration, and which too often (especially in racial equity spaces) manifests as white guilt, fragility, or supremacy; and
       iii. Being resilient in the face of unrelenting emotional, physical, and political attacks, which invariably come when existing systems order is threatened.

This is the core/heart of Equity (in my opinion): Deep Compassion. That we actually have to feel one another in our pain [while not dwelling on it] in order to truly heal it. We cannot go past, around, over or under it. We have to go THROUGH it. This is how we get free; collectively free.

Sheryl: To put a finer point on it as we are ending: People and communities who experience daily oppression are always under attack, whether overt or more subtle. This isn't fantasy or hallucination. **Dominant culture people will need to develop a greater stamina** to _not always be seen as "right" and to be called out and in, and to call themselves and each other "in."_

Deep compassion requires more from us; requires our _very_ best. We can be and do this, if we _want_ to. So, that becomes the question: _How much do we want it? How much are we willing to change?_ The "inner" and "outer" work has to go hand-in-hand, and we can't default to some "universal" erasure of the particularities of our humanness.

We have to be able and willing to do BOTH: Equity and Systems Change; the particular and the universal in both, if we are to truly build and realize the world of love, peace, and justice that we want (that is, IF we really want it...).

THANK YOU…

We invite you to share your learning about what is needed from equity and systems change folks to realize the world we want—and to co-create that world with us. Together, we can live in and create organizations, movements, and a world of abiding love, dignity, and justice.

SUMMARY OF COMPONENTS, IMPEDIMENTS, AND PATHWAYS FORWARD

LEVELS OF DEEP EQUITY WORK	SYSTEMS CHANGE TENETS WITH A LIMITED OR ABSENT EQUITY PERSPECTIVE	IMPEDIMENTS TO EQUITY	PATHS FORWARD	POWER SOLUTIONS
INDIVIDUAL	**1) Expansive Perspective Taking:** Ability to see perspectives other than that of oneself or one's immediate group; and being mentally, emotionally, and practically open to engaging in part of an interconnected whole.	**Not all cultures hold an individualistic, self-focused, non-expansive stance as the starting point.**	Understand and acknowledge that many (sometimes **"novel") tenets of systems change are actually core to Deep Equity.**	**Inner work with equity embedded:** Without personal transformation, equity remains shallow. Address inner resistance, rationalization, fragility, defensiveness, etc. to reduce fear by dominant culture actors that we/they will lose something important. We ALL gain from embedding equity. This takes bravery and courage.
		Mental models limited by dominant culture model-makers' life experience and perspective usually fail to account for privilege and power.	**Powerful, dominant culture writers and practitioners willing to:**	
			• Take an authentic, more humble learner stance (this is key to partnering with experienced Deep Equity people).	
	2) Mental Model Agility: Awareness and ability to change one's mental images of how a problem is defined and what solutions may exist.	**"Eureka" moments by dominant culture theorists: What's not obvious to dominant culture people may be very obvious to non-dominant people.**	• Develop skill in racialized power analysis, and apply that skill to their _own_ self and identity group(s), as well as to systems and people they seek to impact and change. Only do this in authentic partnership with non-dominant actors who have a Deep Equity practice.	**Particularity and universalism:** Ensure that all systems change efforts are grounded in acknowledgment of our particular individual histories and multiple identities, _as well as_ our shared humanity.
		Decades-long practices in the equity field are appropriated, re-packaged, marketed, and sold piecemeal and as "novel" in the Systems Change world; this "re-packaging" often dangerously misses key, additional components of equity.	• Engage in significant interpersonal AND systemic, historical equity training.	
	3) Specialized Tools to Perceive Systems: Specialized analytic tools and methods are needed to make the imperceivable parts of systems perceivable	**"Woke Olympics"** (a term an equity client shared with us) and tendency of dominant culture practitioners to posture and try to "school" others on equity without awareness of how much more they need to learn.	• Drop the "competition" mindset and jockeying for visibility; prominently name the non-dominant people who have informed one's work and equity capacity.	**Multiple ways of knowing / skillful immersion / exposure:** Create deeper awareness of and value for other ways of being, knowing, and doing. Develop the capacity to skillfully engage individuals and groups whose ways of being, knowing, and doing are different from and can complement your own, in non-tokenizing, non-exploitative and non-superficial ways.
		Personal inner work that lacks equity perspective can overemphasize our common humanity and allows people to avoid confronting very real differences in life experiences, undercutting the possibility of clear analysis or true systems change.	• Skillfully deepen exposure to non-dominant people and cultures in non-exploitative ways and "un-numb" themselves to daily experiences of exploitation and dehumanization of non-dominant people.	
		Systems change actors/authors are often **unaware that their efforts are shallow in terms of equity,** and pass their work off as having equity embedded.	**Equity-informed inner work** to cultivate courage, openness, and clarity; engage and experience the specific realities of the material and social world, as _well_ as the universal and transcendent aspects of human experience.	

LEVELS OF DEEP EQUITY WORK	SYSTEMS CHANGE TENETS WITH A LIMITED OR ABSENT EQUITY PERSPECTIVE	IMPEDIMENTS TO EQUITY	PATHS FORWARD	POWER SOLUTIONS
INTERPERSONAL	**4) Social Network Building:** Individual links to people outside one's close network fosters trust necessary for collective problem solving. **5) Quality of Presence and Listening:** Individual-level states of openness and awareness need to manifest in relationships of deep listening, mutual understanding, and trust.	**Unconscious bias** against—and historic patterns of devaluation of—non-dominant ways of knowing and being **limits authentic relationships and trust.** Network **"inclusion" often limited** to people with whom white-dominant groups are comfortable and familiar. Dominant-culture members are **often unaware of how their group membership distorts and limits their perceptions of, and relationships** with, non-dominant people; non-dominant people are often keenly aware of these distortions. **Racism and power differentials result in long-time approaches from non-dominant practitioners being invisible to mainstream,** typically well-funded, and acknowledged dominant actors.	**Uncover areas of personal unawareness.** Authentic "owning" of one's own group, history, impact on other groups, etc. can open new channels of communication, healing, and trust. **Learn, share, and deepen approaches that are beyond existing skill sets and knowledge.** **Connect to the profound work that has been going on for a very long time in Deep Equity and social justice spaces.** **Become deeply cross-culturally literate.** This requires dominant culture folks (at least in the U.S.) to be intentional and dedicated to this (in training, non-surface exposure, deep relationships, places of work and living, engagement with the arts, etc.) **[+ All of the Individual level pathways described above]**	**Authentic partnership:** Skillfully, authentically, and humbly PARTNER with long-time Deep Equity people, in non-tokenized ways, to learn from, co-analyze, co-create solutions and co-assess progress, and jointly course correct in deep partnership with those most impacted. Authentic partnership includes: • Creating relationships with and exploring the wisdom that non-dominant communities and social change practitioners are *already* using, to learn and share and deepen approaches that are beyond current skill sets and knowledge; • Calling out and calling in around harmful behaviors as acts of love. **Learn about the Habits of White Dominant Culture.**[42] Familiarize systems change actors with the habits of white dominant culture, ensure these are not thoughtlessly reinforced, and transform them into equity-embedded practices of liberation.

[42] *White Dominant Culture and Something Different.* Adapted from Tema Okun and Kenneth Jones. https://www.cacgrants.org/assets/ce/Documents/2019/WhiteDominantCulture.pdf

LEVELS OF DEEP EQUITY WORK	SYSTEMS CHANGE TENETS WITH A LIMITED OR ABSENT EQUITY PERSPECTIVE	IMPEDIMENTS TO EQUITY	PATHS FORWARD	POWER SOLUTIONS
INSTITUTIONAL	**6) Diverse and Inclusive Institutions:** A diverse staff and inclusive culture prepares an organization to collaborate externally. **7) Shared and Distributed Leadership:** Shifting the locus of information-processing and decision-making from the "top" to the "bottom" or periphery strengthens institutional effectiveness and responsiveness in complex environments.	**Many "diverse and inclusive" organizations have not reckoned internally with internal power dynamics and inequities,** which undermines internal and external collaborations. "Diversity and inclusivity" are necessary but not sufficient aspects of equity. **Power shifting is impossible when dominant culture assumptions** regarding "competence," "correct" ways of knowing, thinking, leading, behaving, communicating, etc. are left unexamined, and when dominant group members have limited cross-cultural literacy. Organizational **practices that ignore power, privilege, race, and healing of trauma limit the ability to achieve missions** and to make systems change. **White liberals justifying their behavior and avoiding deep equity work perpetuate increasingly visible harm, and retrench limited trust.** **Underestimation** of the time, cost, skill, and personal commitment to transformation required **to embed Deep Equity in an organization or network.**	Deepen skill in **equity-informed power analysis** (especially racial) and apply it explicitly to one's own organization, partnerships, and networks. **Deep examination of internal culture, processes, systems, structures, norms, habits, programs,** communications, HR and financial investments, approaches to partnering, and external work, etc. from an equity perspective. **Comprehensive, organization-wide healing and equity transformation work** with skilled consultants and leveraging equity expertise from internal staff and board. **Calling out and calling in around harmful behaviors as acts of love.** **Authentic, power-healthy connections and partnership with Deep Equity communities of practice.** **[+ All of the Individual and Interpersonal Level pathways described above]**	**[Power solutions at this level are the same as at the previous level]** **Authentic partnership:** Skillfully, authentically, and humbly PARTNER with long-time Deep Equity people, in non-tokenized ways, to learn from, co-analyze, co-create solutions and co-assess progress, and jointly course correct in deep partnership with those most impacted. Authentic partnership includes: • Creating relationships with and *exploring* the wisdom that non-dominant communities and social change practitioners are *already* using, to learn and share and deepen approaches that are beyond current skill sets and knowledge; • Calling out and calling in around harmful behaviors as acts of love. **Learn about the Habits of White Dominant Culture:** Familiarize systems change actors with the habits of white dominant culture, ensure these are not thoughtlessly reinforced, and transform them into equity-embedded practices of liberation.

LEVELS OF DEEP EQUITY WORK	SYSTEMS CHANGE TENETS WITH A LIMITED OR ABSENT EQUITY PERSPECTIVE	IMPEDIMENTS TO EQUITY	PATHS FORWARD	POWER SOLUTIONS

SOCIETAL/SYSTEMIC	**8) Engaging Key Stakeholders:** Including those with needed resources, those with decision-making power, and the people most affected by the issue.
	
	9) Shared View of Current Reality and System Dynamics: Including events, forces, power dynamics, underlying assumptions, and mental models.
	
	10) Shared View of Desired and Emerging Future: All stakeholders contribute to shared vision, outcome metrics, core strategies, and roles.
	
	11) Experiments in the Direction of Shared Future: Iterate toward shared future, changed power, and causal relationships via continual learning and adaptation.
	
	12) Transformation of the Nature and Quality of Awareness, Listening and Consciousness: Help stakeholders, *together*, deepen awareness of the whole system, shift mental models, develop more inclusive levels of understanding and connection, and co-create systems for everyone's benefit.
		Bypassing **racism, white supremacist thinking and structures,** entrenched privilege, assimilationist behavior, trauma, racialized mistrust, intergenerational harm, and ignoring the role of institutional oppressions **make it difficult to accomplish the 5 tenets of systems change at the social level with depth.**
		
		Definitions and enactments of "resources," "power," and "engagement" **are often structured to benefit dominant culture groups.**
		
		Power analysis is present in much systems change literature and work, <u>but</u> it often does not include: a) **informal** power, b) **impact of identity** (especially race) on power dynamics, and c) self-awareness of impact of identity of the actors themselves on the degree and type of power analysis done.
		
		Impact "measures" and what are seen as valued "resources" are **often limited by dominant culture frames.**
		
		Systems change efforts and practitioners often underestimate, may not have, or may not be adequately applying the skills and resources to engage in the depth of **inner work and healing** needed for collective transformation of a system, given long-term, intergenerational legacies.
			Authentic partnering to expand and "blow out" the notions of center and periphery.
			
			Ensure Systems Change intervenors have the capacity to be of help to and in skillful, humble partnership with multiracial people who are **differently powered.**
			
			Redistribute and rebalance power, so communities co-own meaning-making and decision-making (incl. defining and assessing impact measures), not just "informed by" or "included" in someone else's process.
			
			Directly name in system maps and work through racism, white supremacy, trauma, racialized cultural divides, and institutional oppression when these are present (and they usually are).
			  • Accurate systems mapping requires **acknowledging the power and interests that give primacy to dominant culture mental models and assumptions** (i.e., those that privilege whiteness, maleness, market-based solutions, formal positional power, etc.).
			
			Systems change agents need **capacity to deal constructively with emotions of all members of the system as they naturally emerge** (pain, denial, anger, guilt, fragility, etc...).
			
			Look fearlessly at the history, root causes, and benefits of the current system(s) to oneself as a change agent and to those "convening" and funding the change process.
			
			Resist impulse to start creating a shared future without the adequate "reckoning" with the past (from a place of awareness, true open heartedness, un-numbing, and empathy).
			
			Deconstruct the term "all" to understand differential experiences, *impacts*, and *solutions*. Get *historical* and *specific*; not just "universal" and generic.
				Power solutions at this largest level circle back to and rely fundamentally on **deep change at the individual and interpersonal levels** to implement effectively -- because all the levels are *nested.** This includes:
				  • Systems Change intervenors at *every level* need to **be on as deep a personal developmental path as humanly possible**, including knowing and acknowledging one's own place on equity journey; do not proceed in the work beyond those limits; and
				  • Un-numbing and operating from a felt sense and pervasive awareness of the interconnectedness of all of the levels, all people, and the planet.
				
				Develop deeper awareness of and operate from "**love-fueled**" approaches to equity.
				
				Build capacity to **skillfully engage individuals and groups whose ways of being, knowing, and doing are different from and can complement** one's own.
				
				Expand authentic partnership to include **national and international, intersecting movement perspectives** (to ensure we are including but moving beyond a geographically bound or more familiar set of "usual suspect" actors).

ABOUT THE AUTHORS

**Sheryl Petty,
Ed.D.**

Sheryl has a 25-year history of supporting cross-sector organizations and individuals to deepen their equity capacity. This work has included equity-driven transformation process design, facilitation, visioning, strategy, equity assessments, alignment, coaching, network development, and tool and framework development. Dr. Petty regularly facilitates multi-year systems change processes focused on equity (including race, socioeconomics, gender, and other dimensions of difference) and its impact on relationships, institutional functioning, and field-transformation. She has been a high school teacher, program manager, executive director, board member, and consultant working in partnership with nonprofits, foundations, colleges and universities, policy advocates, capacity builders, school systems, researchers, and community organizers. Her expertise includes cross-institutional, networked approaches to larger scale change and movement building. She also has a long history of supporting individuals and groups in developing awareness practices, socio-emotional competencies, and mindfulness as core capacities, particularly in addressing emotionally complex and often tension-filled change processes related to equity.

Dr. Petty is a Senior Consultant with *Change Elemental*, and an Associate Consultant with *Movement Strategy Center (MSC)*. She was a Principal Associate at the *Annenberg Institute for School Reform* at Brown University, and Adjunct Faculty at *Teachers College*, Columbia University. She was also a Fellow at *Stanford University's Center for Opportunity Policy in Education* and is currently a Fellow with the *Mind and Life Institute*. Sheryl holds a B.A. in Mathematics, an M.A. in Systematic and Philosophical Theology, and an Ed.D. in Educational Leadership & Change. For nearly 25 years, she has also been a practitioner, is ordained and teaches in both African-based (Yoruba/Lucumi) and Tibetan Buddhist (yogic/non-monastic, Vajrayana, Nyingma) lineages. Her work focuses on supporting the alignment efforts of practitioners, advocates, and community members to heal and unleash our most vibrant selves, transform our social systems, and improve our collective life.

**Mark Leach,
MPPM, DBA**

Mark has worked as a researcher, consultant, and coach for 35 years in cross-cultural collaborations to advance social and economic equity, with a focus on organization and movement strategy and strengthening, and leadership development and transition. He has a passion for finding shared understanding across worldviews and experiences.

Mark joined Change Elemental in 2004 and has worked with social justice organizations, networks, leaders, and funders including Center for Reproductive Rights, DEMOS, Jobs With Justice, Women's Center for Global Leadership, Fund for Global Human Rights, John Merck Fund, Abortion Access Project, Civil Liberties and Public Policy Project, Heifer Project International, Center on Budget and Policy Priorities, and Democracy Fund.

Mark's leadership coaching model supports leaders to step into new organization and movement roles, building on their existing wisdom and capacities. To assist leaders experiencing unprecedented levels of external change, threat, and complexity, Mark continues to learn about and incorporate in coaching practices from the worlds of inner work, adult development, and complexity of mind.

Mark has conducted in-depth research on issues at the intersection of social justice and organizational development, including authoring or co-authoring "Toward Love, Healing, Resilience & Alignment: The Inner Work of Social Transformation & Justice," "Creating Culture: Promising Practices of Successful Movement Networks," "Toward Complex Adaptive Philanthropy," and "Table for Two: Can Founders and Successors Co-Exist So Everyone Wins?"

Prior to joining Change Elemental, Mark was Senior Consultant at John Snow, Inc., Senior Associate at the Institute for Development Research, and Principal Consultant at Kaleel Jamison Consulting Group. Mark received a Masters in Public and Private Management from Yale School of Management, and Doctor of Business Administration from Boston University. Mark savors the rest of this precious life with family and friends, practicing and teaching meditation, and reveling in mystery and beauty through photography and poetry.

ACKNOWLEDGEMENTS

CHANGE ELEMENTAL
Co-Creating Power for Love, Dignity, and Justice

At Change Elemental, we envision a world where the planet and all who inhabit it experience love, dignity, and justice, and where resources and power are shared in ways that provide everyone the opportunity to realize their potential, live life fully, and contribute to the well-being of people and planet.

We partner across sectors to disrupt and transform systems of inequity and create powerful vehicles for justice. Combining wisdom and experimentation, experience and reflection, we join with our clients and partners to imagine and co-create transformative approaches to change that include necessary shifts in what we do, how we do it, and who we are while we are doing it. We partner with clients in the United States, and sometimes globally, to develop strategic frameworks, facilitate in-depth processes focused on deep equity, develop and support leadership at multiple levels, and nurture emerging and evolving networks.

Our approach is rooted in our values, guiding principles, and the elements of a thriving justice ecosystem. These elements include:

- Advancing Deep Equity;
- Embedding Multiple Ways of Knowing;
- Cultivating Leaderful Ecosystems;
- Influencing Complex Systems Change; and
- Centering Inner Work

Learn more: www.ChangeElemental.org

APPENDICES

Glossary of Terms

Diversity
Includes and extends beyond race to include ability, age, caste, ethnicity, gender identity, immigration status, marital status, nationality, religion, role, sexual orientation, socioeconomic status, veteran status, etc.

Equity or Structural Equity
Encompasses racial, ethnic, socioeconomic, gender, and other demographic categories, and includes the disproportionate and cumulative effects of institutional and systemic bias locally, regionally, nationally, and globally in housing, healthcare, education, workforce, etc. Reduces disparities in outcomes based on these categories. Eliminates unjust outcomes that harm the people and planet. Advances liberation so that we can all achieve our full potential and capacity to live individually and collectively in joy.

Habits of White Dominant Culture[43]
Refers to attitudes and behaviors that derive from many aspects of white culture that are harmful when they are considered the norm, or the only or most desirable ways of being and doing in the world.

Inclusion[44]
Authentically bringing traditionally excluded individuals and/or groups into processes, activities, decision-making, and policy making in a way that shares power.

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[43] *White Dominant Culture and Something Different.* Adapted from Tema Okun and Kenneth Jones. https://www.cacgrants.org/assets/ce/Documents/2019/WhiteDominantCulture.pdf
[44] Racial Equity Tools Glossary. http://www.racialequitytools.org/glossary#

Inner Work
Inner work are our individual and collective practices of nurturing health, vitality, clarity, and wholeness in ourselves as people and as a people. Such approaches include:

1. **Continually refueling and replenishing** our reserves when they are low and we are depleted (or not letting ourselves to get depleted);
2. **Skillfully allowing and channeling the transformative energy of emotions** (including love, joy, anger, and others) that can aid or hinder our ability to connect with ourselves and one another, re-ground in our individual and collective core purpose, and buoy timely, skillful action; and
3. **Increasing our synergy, alignment, and collective strategy, and action**, including
   a. **Healing rifts** inside ourselves, our organizations, our networks, and our movements.

Multiple Ways of Knowing
Multiple ways of knowing include the many ways we understand and engage with the world such as through our experiences, art, ancestral wisdom, learnings from the natural world, as well as valuable, more rationalist approaches that are often overprivileged by U.S. dominant culture.

Targeted Universalism[45]
A frame for designing policy that acknowledges our common goals, while also addressing the sharp contrasts in opportunity between differently situated sub-groups.

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[45] powell, john a., Connie Cagampang Heller, and Fayza Bundalli. *Systems Thinking And Race: Workshop Summary*. The California Endowment, 2011. http://www.racialequitytools.org/resourcefiles/Powell_Systems_Thinking_Structural_Race_Overview.pdf

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CHANGE ELEMENTAL

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THE WATER OF SYSTEMS CHANGE
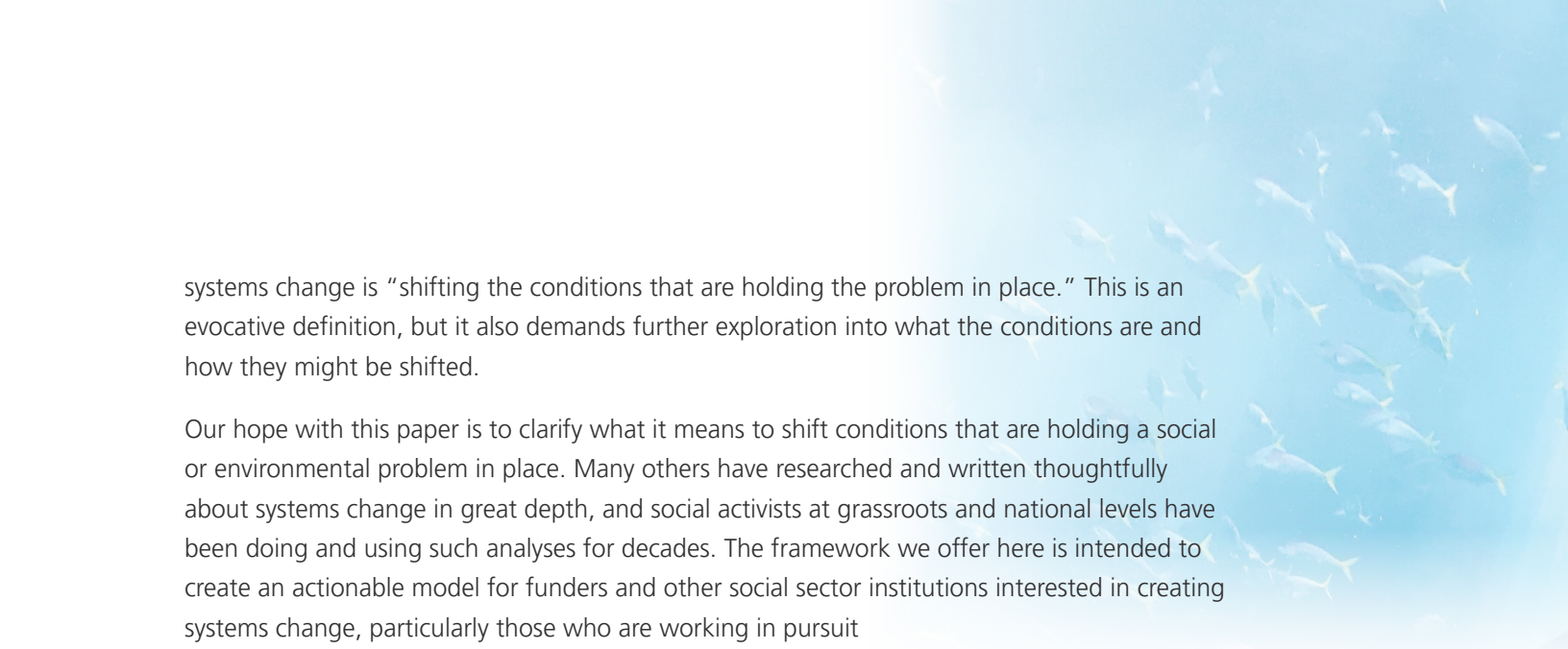
JOHN KANIA, MARK KRAMER, PETER SENGE

June 2018

Foundations involved in systems change can increase their odds for success by focusing on less explicit but more powerful conditions for change, while also turning the lens on themselves.

"Systems change" is not a new concept, but increasingly leaders of foundations, nonprofits, and other influential social sector institutions are hailing it as a promising way to achieve greater impact. The idea has moved from activist and organizer circles to the forefront of discussions among foundation CEOs and is increasingly cited in philanthropy publications and conferences. Yet despite all the attention, and a long tradition of academic study, the concept and its implications for funders and grantees can still seem hard to grasp and apply. One reason the concept is so challenging may be captured by the following well-known story that goes something like this:

> A fish is swimming along one day when another fish comes up and says
> "Hey, how's the water?" The first fish stares back blankly at the second fish
> and then says "What's water?"

As more and more foundations pursue systems change, foundation leaders are increasingly recognizing the water they have been swimming in all along. For all the excellent programs and nonprofit organizations foundations have seeded and scaled up, funders have rarely reached their ambitious goals for lasting change. Complex problems such as mass incarceration, educational disparities, and environmental degradation remain intractable due to myriad constraints that surround any specific program a foundation might fund. Constraints include government policies, societal norms and goals, market forces, incentives, power imbalances, knowledge gaps, embedded social narratives, and many more. These surrounding conditions are the "water" that many foundation leaders are exploring more deeply.

The first step in seeing the water is to illuminate the systemic forces at play. Grappling with this messy kaleidoscope of factors is a much different process than funding or managing a typical nonprofit program. It requires that changemakers look beyond any single organization to understand the system by identifying all of the actors that touch the issue they seek to address. One must then go further to explore the relationships among these actors, the distribution of power, the institutional norms and constraints within which they operate, and the attitudes and assumptions that influence decisions. These are the conditions that significantly impede or enable social change. As Social Innovation Generation (SIG) in Canada defines it more broadly,

systems change is "shifting the conditions that are holding the problem in place." This is an evocative definition, but it also demands further exploration into what the conditions are and how they might be shifted.

Our hope with this paper is to clarify what it means to shift conditions that are holding a social or environmental problem in place. Many others have researched and written thoughtfully about systems change in great depth, and social activists at grassroots and national levels have been doing and using such analyses for decades. The framework we offer here is intended to create an actionable model for funders and other social sector institutions interested in creating systems change, particularly those who are working in pursuit of a more just and equitable future. In offering this contribution, we acknowledge that, as white males who are in the process of unpacking our own areas of privilege, our viewpoints inevitably come with blind spots. Over the course of writing this paper we benefited from the generous suggestions of many people who helped us to see dimensions in our ideas that we did not initially see ourselves. We offer special thanks to our equity consultants Sheryl Petty and Mark Leach at Management Assistance Group, FSG colleagues Veronica Borgonovi and Lauren Smith, and senior advisor Paul Schmitz for their unique contributions to improving this work.

> Systems change is about shifting the conditions that are holding the problem in place.
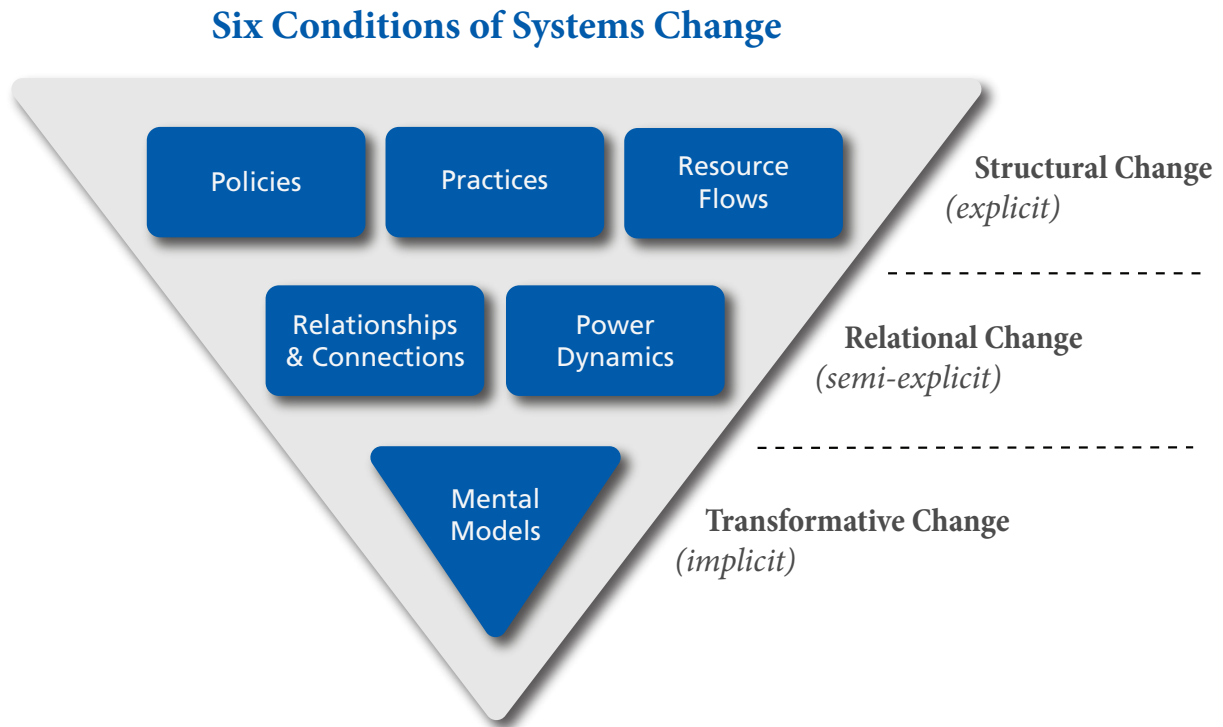
Six Conditions of Systems Change

Figure 1 shows six interdependent conditions that typically play significant roles in holding a social or environmental problem in place.[1] These conditions exist with varying degrees of visibility to players in the system, largely due to how explicit, or tangible, they are made to most people.

It is important to note that, while these conditions can be independently defined, measured, and targeted for change, they are also intertwined and interact with each other. The interaction can be mutually reinforcing (e.g., a change in community and legislator mental models may trigger a policy change). The interaction can also be counteracting (e.g., scaling effective practices

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1 The framework depicted here draws upon the extensive literature behind systems change and systems thinking. The six conditions we mention have been articulated in various ways by a variety of academics and practitioners (see, for example, *Building Ecosystems for Systems Change*, Social Innovation Generation; Foster-Fishman, P.G., & Watson, E.R. *The ABLe Change Framework: A Conceptual and Methodological Tool for Promoting Systems Change*). Specific terminology and definitions for these conditions will vary from this article. Inspired by the well-known systems thinking "iceberg" concept and Donella Meadows' body of work—for example, *Leverage Points: Places to Intervene in a System* (1999)—this framework also places systems change conditions at three different levels with respect to their visibility and their ability to transform a system. Our hope is that this depiction will support foundations and other social sector institutions in developing systems change strategies by illuminating key internal and external leverage points that support sustainable progress at scale.

FIGURE 1. SHIFTING THE CONDITIONS THAT HOLD THE PROBLEM IN PLACE

Six Conditions of Systems Change

Policies	Practices	Resource Flows	**Structural Change** *(explicit)*
Relationships & Connections	Power Dynamics	**Relational Change** *(semi-explicit)*
Mental Models		**Transformative Change** *(implicit)*

SYSTEMS CHANGE CONDITIONS—DEFINITIONS

Policies: Government, institutional and organizational rules, regulations, and priorities that guide the entity's own and others' actions.
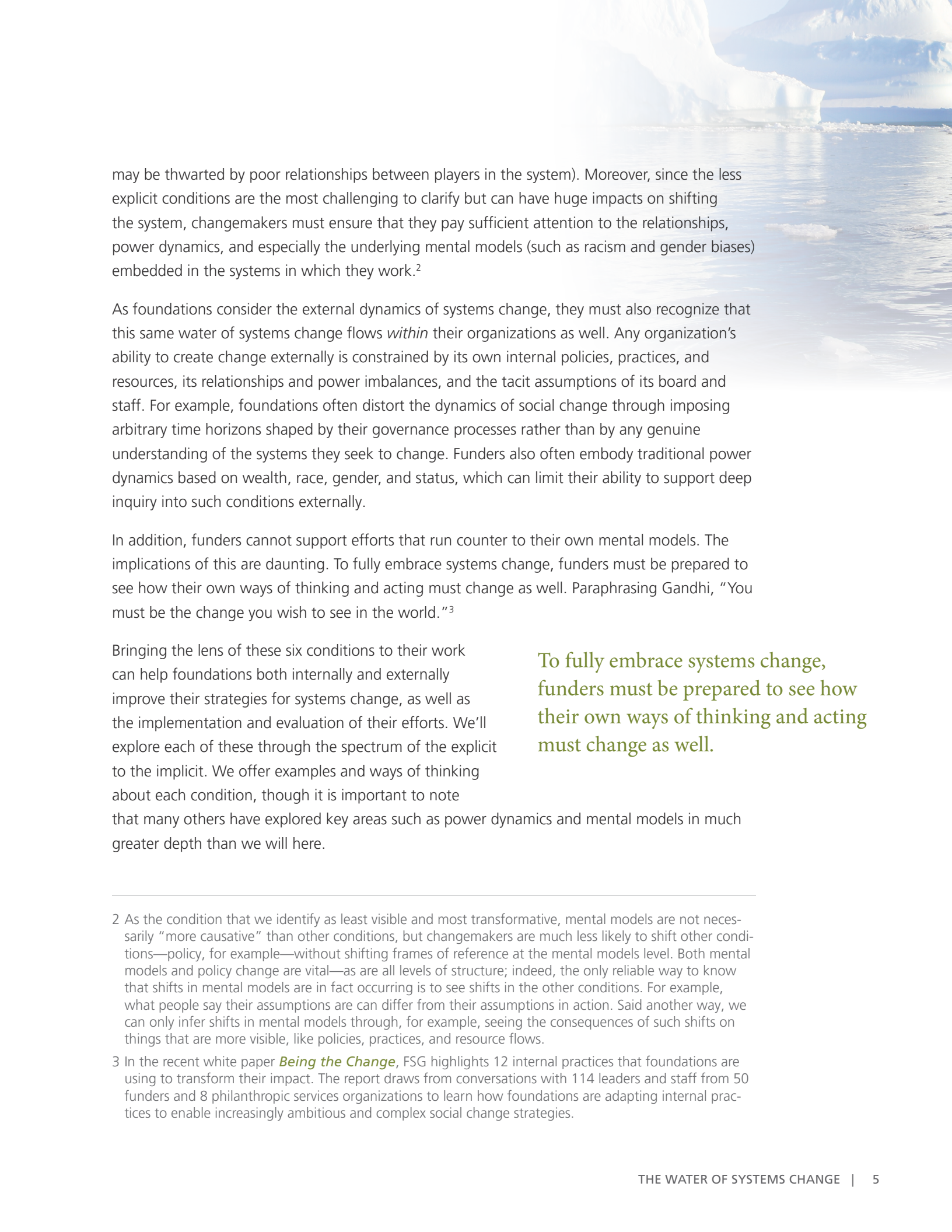
Practices: Espoused activities of institutions, coalitions, networks, and other entities targeted to improving social and environmental progress. Also, within the entity, the procedures, guidelines, or informal shared habits that comprise their work.

Resource Flows: How money, people, knowledge, information, and other assets such as infrastructure are allocated and distributed.

Relationships & Connections: Quality of connections and communication occurring among actors in the system, especially among those with differing histories and viewpoints.

Power Dynamics: The distribution of decision-making power, authority, and both formal and informal influence among individuals and organizations.

Mental Models: Habits of thought—deeply held beliefs and assumptions and taken-for-granted ways of operating that influence how we think, what we do, and how we talk.

may be thwarted by poor relationships between players in the system). Moreover, since the less explicit conditions are the most challenging to clarify but can have huge impacts on shifting the system, changemakers must ensure that they pay sufficient attention to the relationships, power dynamics, and especially the underlying mental models (such as racism and gender biases) embedded in the systems in which they work.[2]

As foundations consider the external dynamics of systems change, they must also recognize that this same water of systems change flows *within* their organizations as well. Any organization's ability to create change externally is constrained by its own internal policies, practices, and resources, its relationships and power imbalances, and the tacit assumptions of its board and staff. For example, foundations often distort the dynamics of social change through imposing arbitrary time horizons shaped by their governance processes rather than by any genuine understanding of the systems they seek to change. Funders also often embody traditional power dynamics based on wealth, race, gender, and status, which can limit their ability to support deep inquiry into such conditions externally.

In addition, funders cannot support efforts that run counter to their own mental models. The implications of this are daunting. To fully embrace systems change, funders must be prepared to see how their own ways of thinking and acting must change as well. Paraphrasing Gandhi, "You must be the change you wish to see in the world."[3]

Bringing the lens of these six conditions to their work can help foundations both internally and externally improve their strategies for systems change, as well as the implementation and evaluation of their efforts. We'll explore each of these through the spectrum of the explicit to the implicit. We offer examples and ways of thinking about each condition, though it is important to note that many others have explored key areas such as power dynamics and mental models in much greater depth than we will here.

> To fully embrace systems change, funders must be prepared to see how their own ways of thinking and acting must change as well.

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2 As the condition that we identify as least visible and most transformative, mental models are not necessarily "more causative" than other conditions, but changemakers are much less likely to shift other conditions—policy, for example—without shifting frames of reference at the mental models level. Both mental models and policy change are vital—as are all levels of structure; indeed, the only reliable way to know that shifts in mental models are in fact occurring is to see shifts in the other conditions. For example, what people say their assumptions are can differ from their assumptions in action. Said another way, we can only infer shifts in mental models through, for example, seeing the consequences of such shifts on things that are more visible, like policies, practices, and resource flows.

3 In the recent white paper *Being the Change*, FSG highlights 12 internal practices that foundations are using to transform their impact. The report draws from conversations with 114 leaders and staff from 50 funders and 8 philanthropic services organizations to learn how foundations are adapting internal practices to enable increasingly ambitious and complex social change strategies.

Influencing the Explicit to the Implicit

THE EXPLICIT

Foundations, nonprofits, and other social sector actors have long worked at the first level of our inverted triangle to inform government policy, promote more effective practices, and direct human and financial resources toward their chosen goals. Changing these structural conditions can have powerful effects. The results are readily observable and can often be assessed through traditional evaluation and measurement techniques. But without working at the other two levels, shifts in system conditions are unlikely to be sustained.

Consider, for example, the Affordable Care Act (ACA) enacted during President Obama's administration. The ACA is one of the largest shifts in policy and flow of resources this country has seen in decades. Millions of people who were previously excluded from health care have gained access to it. The ACA included numerous financial components intended to change practice by realigning incentives for greater accountability for health outcomes. In short, the ACA created huge impact at the first level of systems change.

At the second level of systems change, the ACA helped catalyze stronger relationships between community and health providers as more attention is being paid to the social and structural determinants of health. However, the ACA has not yet significantly changed the relationships among key players such as providers, insurers, pharmaceutical companies, and patients. Nor has the ACA been successful in shifting power from corporate lobbyists, political parties, and congressional legislators to consumer and patient advocates.

Most fundamentally of all, the ACA's supporters did not successfully instill a new public narrative about why America's uninsured deserve access to health care or the ways in which broader health care coverage strengthen the global competitiveness of the U.S. to benefit all citizens. A sufficient number of health care and public health advocates were galvanized by their sense of what the ACA had achieved to prevent the repeal of the ACA. However, without shifting the underlying mental models of a critical mass of lawmakers, corporate leaders, and the general public, the ACA's achievements and potential remain at risk.

Shifts in system conditions are more likely to be sustained when working at all three levels of change.

A similar story can be told about the migrant crisis in Europe. When politicians increased the number of refugees that were allowed to enter their countries, they addressed practices, policies, and even provided financial resources for resettlement. Without promoting an accompanying narrative to win over the hearts and minds of their citizens, however, a fear of economic and security risks, along with a fear of the "other"

(e.g., other religions, other cultures, other races), undermined successful resettlement and created a major political backlash in countries such as Germany, Italy, and the UK that threatens to reverse the political leaders' first-level changes.

THE SEMI-EXPLICIT

The same interdependencies operate at the second level of our framework. Shifting power dynamics and building relationships across sectors and political divides may feel especially threatening to foundations, but it is essential work in systems change.[4] Transforming a system is really about transforming the relationships between people who make up the system. For example, far too often, organizations, groups, and individuals working on the exact same social problems work in isolation from each other. Simply bringing people into relationship can create huge impact.

Recent years have seen a growing interest among foundations in supporting comprehensive community change, collective impact, and other methodologies that build cross-sector coalitions, engage affected communities in shaping solutions, and bring an equity lens to the work. These efforts can begin to address both relationships and power dynamics. For example, the Road Map Project, a cradle-to-career collective impact initiative in south Seattle and south King County, worked to build relationships among school districts, funders, community colleges, early learning providers, youth development organizations, community activists, and others who were already deeply committed and working hard to make structural change in the system. The first phase of the work focused on building a common agenda and measurement system, reporting results, and developing a shared strategy. Dozens of organizations began to align and coordinate their efforts, and people from various sectors began to work together in ways they hadn't before. This was especially true in the south suburbs where poverty was skyrocketing due to the forces of gentrification at play in Seattle proper. This phase of work helped build momentum and contributed to many areas of solid progress such as a big increase

> Transforming a system is really about transforming the relationships between people who make up the system.

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4 Tools can help. For example, in their recently released *Systems Grantmaking Resource Guide*, Management Assistance Group and Grantmakers for Effective Organizations include a tool for mapping power. The tool's purpose is to identify opportunities and challenges for changing the power dynamics in a system (e.g., influencing those in power directly or creating the conditions needed for others to build power) in order to change the system. The authors describe how one grantmaker worked with Strategic Concepts in Organizing in Policy Education (SCOPE) to conduct a power analysis with grantees and stakeholders to understand the political landscape as it relates to a key determinant of education outcomes for elementary-school-age children: poor nutrition and diet. This mapping process led to a campaign to pressure the school board to change the vendor supplying school lunches, resulting in thousands of children receiving more nutritious lunches.

in high school graduation rates. However, community members voiced frustration that their perspectives were not being sufficiently incorporated throughout the process, and despite the progress, it was clear that racial disparities were not closing.

In response, project leaders embarked on a strategy revision. As part of the new direction, they decided to establish a new strategic leadership body for the project composed entirely of diverse leaders who come from the Road Map Project's communities. The original leadership group, composed of powerful systems leaders, stepped aside, acknowledging that this new Community Leadership Team could be a better mechanism for understanding the community needs and aspirations and could be a more potent force for change.

Or consider the importance of relationships within the system when the Conrad N. Hilton Foundation launched an effort to end chronic homelessness in Los Angeles. Permanent "supportive housing," which combines a home with the social services needed to address the multiple disadvantages of the chronic homeless, has emerged as a promising solution. However, the mayor and city administration controlled housing, while the county agencies and board of supervisors controlled social services. The two levels of government had never worked together and, in fact, often blamed each other for the growing homeless population. As the Hilton Foundation brokered and built relationships across this divide, they brought together city and county staff who had never even spoken before. Ultimately, a joint plan was developed. The city agreed to issue a $1.2 billion bond to pay for 10,000 new housing units, funded by a property tax surcharge, while the county agreed to a sales tax increase that would fund $355 million annually in social services to accompany the housing. Without changing the relationship between these major players in the system, the problem may never have been addressed in such a meaningful way. The impact of the changed relationships that grew out of the foundation's work dwarfed its direct grantmaking dollars.

THE IMPLICIT

When it comes to seeing and talking about the water of systems change, the third level—mental models—poses the greatest challenge and, for many foundations, is the newest dimension of their work. Most systems theorists agree that mental models are foundational drivers of activity in any system. Unless funders and grantees can learn to work at this third level, changes in the other two levels will, at best, be temporary or incomplete.

Following in the footsteps of many national advocacy organizations that have been actively engaged in "changing the narrative" for some time, a handful of leading foundations have begun working on changing the narrative for the issues they address. The "narrative," of course, is merely one visible embodiment of and influence on the underlying mental model. Our mental

models shape the meaning we assign to external data and events and guide our participation in public discourse. At the same time, external information and public discourse can bring to the fore one or more of the many different mental models each of us holds. In this sense, mental models and prevailing social narratives are interdependent.

"Mental models and social narrative work in a bi-directional way," says FrameWorks Institute CEO Nat Kendall-Taylor. He continues, "Narratives are shaped by mental models, but narratives also, over time, shape the mental models we have." For example, we have lately seen a powerful shift in the mental models associated with sexual harassment in the workplace. While most people likely had thoughts on what behavior was inappropriate or illegal, prevailing mental models played into sexual stereotypes that condoned shameless behavior, undermined the credibility of victims, and limited the mainstream media's reporting on the topic.

> **Most systems theorists agree that mental models are foundational drivers of activity in any system.**

These often unspoken social norms were highly visible to and understood by people most directly experiencing harassment, abuse, and assault, and often less "seen" and questioned by people not directly suffering from the current systemic conditions. We have seen these entrenched mental models begin to shift as women, particularly those in positions of relative privilege and influence, have increasingly used social media to share information and personal stories against a heightened political backdrop.

A new narrative of zero tolerance is emerging in public debate and, for many people, is shifting their own internal mental models. Although there has been no change in the laws and legal remedies available to prosecute abusers, this change in narrative has suddenly had profound consequences in shifting the line between what is and is not tolerated. It has also shed light on the implicit power dynamics that have often determined the way women are depicted by the media and entertainment industries as well as the barriers they encounter in all facets of society.

> **"Mental models and social narrative work in a bi-directional way. Narratives are shaped by mental models, but narratives also, over time, shape the mental models we have."**
>
> *— Nat Kendall-Taylor, CEO, Frameworks Institute*

But how do you shift a narrative with a long history of legitimacy? As we will explore below, this is the domain of movements. Movements like Mothers Against Drunk Driving (MADD) in the U.S. have had a deep and lasting impact by making a recognized but somewhat tolerated problem unacceptable, such as by helping people emotionally connect to the perspective of a mother who lost a child to a drunk driver.

Whether a narrative actually shifts can depend on how an issue is framed and by whom. Consider the varying mental models that LGBTQ activists in the U.S. confronted in efforts to legalize gay marriage. When activists framed their argument based on the idea that same-sex couples should have the same rights as traditional married couples, they failed to connect with existing mental constructs in the wider population. After extensive research, some activists decided that the issue could be reframed to fit a widely accepted mental model that two people in love should be able to marry. Once the issue was reframed from one of "rights" to one of "love," the advocates were able to mobilize enough popular support to achieve their objective.

Recognizing the fundamental importance of mental models to systems change can leave one either discouraged by their seeming intransigence or hopeful about the power of narrative to create change. For example, the Occupy and Black Lives Matter (BLM) movements put forth powerful alternative narratives to mainstream thinking. Both Occupy and BLM are in the early stage as movements, yet both have influenced mental models across the country. Occupy, though limited in accomplishing specific aims, established in the zeitgeist the frame of the wealthiest "1%," which has remained a rallying point on the Democratic left and even on the populist right. This framing has the potential to emerge again with continuously widening income inequality. BLM changed the narrative on institutional racism and policing, an issue that has existed for generations and was often not believed by white leaders. The narrative shift, along with widespread engagement from thousands of affected people, has resulted in reforms in many police departments, such as body cameras and training in mental health crisis response, as well as new civil rights investigations.

> Challenges to racial equity show up throughout all three levels of systems change.

In considering the three levels of systems change—explicit, semi-explicit, and implicit—it is important to note that challenges to racial equity show up throughout. There are inequities at every level of systems change that must be recognized and addressed—narratives that have racial under- and overtones; power dynamics that reinforce existing and, often, white power structures; relationships and alignments of systems that often neglect the leaders, organizations, and groups closest to the challenges; resource flows that benefit those with social capital and content expertise more than those with direct experience and context expertise; practices that support vulnerable communities but nonetheless still disadvantage people of color; regulations

that maintain systemic racism or are too complex for smaller, more community-based groups to navigate; and public policy that drives disparate outcomes.

Moreover, as mentioned earlier, each of the six conditions interact and are intertwined, perpetuating a system that can reinforce inequity and any "-ism" such as racism, sexism, or ableism. For instance, the mental models that individuals hold can create implicit biases through which they interpret and make sense of other people, ideas, and events. Historically, those who are in power have shaped the mental models of their constituents. Therefore, changing mental models often means challenging power structures that have defined, influenced, and shaped those mental models historically and in the present. Because the powers that be are often advantaged in defining the public narrative (i.e., history is written by the winners), this reinforces their power and the status quo.

The construction of Civil War monuments, which has received significant visibility recently as many city and state governments remove these statues, provides a case in point. Most of these monuments were not built immediately after the war's end in 1865. The vast majority were actually built between the 1890s and 1950s, which coincided with the era of Jim Crow segregation.

> Changing mental models often means challenging power structures that have defined, influenced, and shaped those models historically and in the present.

Typically, the story conveyed by those in power who erected the Confederate statues was that the statues symbolized virtue, sacrifice, and the nobility of leaders. This became the predominant mental model for many Americans and carried through to the present day. A competing narrative is that these statues were in fact constructed to glorify the Confederate cause of the Civil War and to maintain racism. The Equal Justice Initiative, Southern Poverty Law Center, and many other civil rights organizations and activists have effectively demonstrated this narrative.

As with most issues of race, the issue of Confederate statues remains unsettled across America. However, it is notable that the mental models of a number of people in power—specifically white people—have been changed. A case in point is Mayor Mitch Landrieu of New Orleans, who dismantled Confederate statues in New Orleans and who recently wrote the book *In the Shadows of Statues: A White Southerner Confronts History*. Mayor Landrieu's mental model has shifted during his time as mayor. He is now working alongside activists to, in his words, "gently peel from your hands the grip on a false narrative of our history," by using his position of power to shift the mental models of others.

Systems Change in Action: The California Endowment

As more foundations recognize that systems change, rather than individual programs or predetermined logic models, is their best hope for realizing their ambitious goals, they must reconstruct their strategies to attend to all three levels of systems change—explicit, semi-explicit, and implicit. And they must confront the very same conditions for systems change within the foundation that they are focused on changing externally. More important still, they must learn to see how the two are connected. To quote Bill O'Brien, a mentor for one of the authors, "The success of the intervention is based on the interior condition of the intervenor."

Consider, for example, the way a systems change approach influenced both the internal and external actions of The California Endowment's (The Endowment) billion-dollar, 10-year initiative "Building Healthy Communities" (BHC). This effort has focused on improving the health of young people in 14 of California's communities most devastated by health inequities. As this initiative has been underway for a number of years and has completed several rigorous evaluations related to the effort, it can serve as a useful example of multi-level systems change.

The Endowment first initiated BHC in 2010 as a more conventional philanthropic effort by setting forth "Four big results, 10 key outcomes, and a logic model." After receiving critical feedback from community residents, The Endowment revised the initiative's goals to "building people power, implementing proven health protective policy, and changing the narrative about what produces health."[5] This more community-centric orientation also created better alignment with many years of existing community-building efforts.

> Foundations must confront the very same conditions within the foundation that they are focused on changing externally.

This shift from imposing a predetermined strategy to focusing on building power and voice within the community was the first profound internal change that The Endowment had to make. Program staff and board members had to accept that a different mental model of social change would produce better outcomes. The new goals also did not divide neatly into program areas, necessitating the development of new cross-departmental program teams.

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5 Although only three of the six conditions are explicitly mentioned in its goals, The California Endowment has in fact worked on all six systems change conditions at the three levels.

At the first level of systems change, BHC has set up a unique structure in which efforts to pursue policy change in BHC's local communities align with and reinforce statewide efforts, enabling a more unified and powerful "grassroots-to-treetops" approach. Ultimately, changing policies at the first level depended on changing relationships and power dynamics at the second level.

The Endowment brought together diverse stakeholder groups, including lawyers, activists, politicians, and youth that had never worked together to score more than 100 policy victories in the first five years on diverse issues such as land-use planning and healthy eating. At a state level, BHC has advanced healthier school climate policies, educated and enrolled uninsured residents in the ACA and Medicaid expansion plans, successfully advocated for undocumented residents to have access to health care, and pushed for important criminal justice reforms.

Rather than hire experts to draft policy papers as The Endowment might normally have done, the BHC engaged youth as key changemakers, inviting them to sit on the BHC steering committee and to advise The Endowment's president.

The Endowment has provided essential training to equip youth with leadership and public speaking skills, platforms for engagement, and stipends for youth to become actively involved. Thousands of youth showed up for school board hearings, something that had never happened before. As a Sacramento staffer said, "You can see the testimony of these young men impacting some of the decisions. It's actually changing minds." This new level of engagement also changed the way young men of color were perceived more broadly by community leaders and elected officials.

In terms of resource flows, BHC launched an innovative impact investing fund that attracted $200 million in private sector capital to provide better access to fresh food for inner city residents. This too required a significant shift in foundation board and staff mental models and organizational structures to accept the use of investment capital as a new tool for social change.

At the second level of systems change, The Endowment's work with diverse stakeholders, youth, legislators, and the private sector clearly changed relationships and power dynamics throughout their communities, putting racial equity more squarely at the forefront of all community policies, practices, and procedures.

"Plugging the voice of the community into the right kind of political power grid will do more to create health and wellness than any other single intervention."

— Building Healthy Communities Initiative (BHC)

According to The Endowment, "Plugging the voice of the community into the right kind of political power grid will do more to create health and wellness than any other single intervention." And when community members observed that program officers still held an uneven balance of power through their funding decisions, The Endowment responded by creating the Fund for an Inclusive California that handed grantmaking power to the community itself.[6]

The third level of systems change—mental models—has also been a key focus in the BHC effort. The Endowment has worked intensely to change the narrative on expanded health coverage, improving students' attitudes in school, and influencing communities to value crime prevention over incarceration. Reducing excessive school suspensions, for example, depended on establishing a new narrative among school principals. The Endowment highlighted research that showed the suspensions disproportionately affected young men of color, did not improve their behavior, correlated strongly with incarceration in later years, and ultimately cost the public an average of $750,000 per student in lost lifetime taxes plus health and criminal justice system costs.

The Endowment also led a targeted media campaign to shift from a narrative of exclusion to inclusion with hashtags such as #FixSchoolDiscipline and #SchoolsNotPrisoners. At the center of each campaign were the actual voices and stories of those most affected by the issue at hand. This new narrative expanded the awareness of school administrators from focusing on short-term punishment to recognizing the longer-term consequences of excluding youth from school.

As The Endowment focused on the less visible, less explicit systems change conditions— relationships and connections, power dynamics, and mental models—staff and board needed to shift their mental models about evaluation.

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6 Power dynamics can seem like a third rail for foundations, yet it's critical for foundations to clarify their orientation to power because how a foundation approaches power affects its role as a change agent. Take, for example, the power dynamics between foundations and grantees. Based on research that included 54 foundations in 22 countries, Avila Kilmurray and Barry Knight posited that foundations fell into two types of groups: those that could be categorized as "power over" types and those that could be categorized as "power with." "Power over" types stressed the importance with grantees of a proven track record, high organizational capacity, a clear theory of change, and the ability to produce outcomes. The "power with" types stressed the importance of a participative approach, connection to the grassroots and innovative approaches, and were put off by a theory of change. How these two types approached the notion of partnering with grantees was also notable. "Power over" foundations set their agenda and searched for grantees that could fulfill their intent. "Power with" foundations were comfortable following the lead of their grantees and allowing the agenda to evolve based on grantee experience. See Guinee, L. & Knight, B. (2013). "What's power got to do with it?" *Alliance Magazine*.

Systems change occurs within a mosaic of constantly fluctuating activity that makes it impossible to determine "cause and effect" in the traditional linear evaluation framework. Funders that seek to track progress with systems change must gather data through multiple windows and from multiple players, keeping the focus on learning to inform what to do next.

Addressing the less explicit systems change conditions often requires a shift in a foundation's mental model about evaluation.

Recognizing the need for a more nuanced approach to evaluation, The Endowment has used numerous methods that together provide the opportunity for pattern detection. These include work commissioned by local learning and evaluation teams, meetings to share best practices, multiple independent in-depth reviews and case studies, "North Star" indicators, and longitudinal analyses of the healthy development of participating youth. Together, this set of activities has begun to reveal insights into if and how systemic conditions in BHC's communities and across California are shifting in the direction of desired outcomes.

As the BHC example illustrates, it is critical for funders aspiring to systems-level change to reveal the ongoing mental models at play within their organization. Says Kendall-Taylor, "Foundation staff and boards often hold the same mental models as the public and wider culture. The same ways of thinking about race and equity, or even public services and individual deservingness, that keep progressive policy from capturing public support are at play within foundations themselves—shaping how grantmaking is done and the types of programs that are pursued." Perhaps the most empowering action that foundations can take to change systems will come from changing the mental models of board members and staff as they delve more deeply into how systems change happens.

For funders aspiring to change systems, it is critical to reveal the ongoing mental models at play within their organization.

Building Capacity To See the Water

Attempting to foster systems change without building the capacity to "see" systems leads to a lot of talk and very little results. One does not learn to play the violin in a three-day intensive course. Real learning—developing a capability to do something we could not do before— demands deep commitment, mentoring, and never-ending practice. The same is true for capacity

building among collective actors such as performing arts ensembles or high-performing sports teams. This is no different when it comes to fostering systems change.

"I see a lot of people today advocating for systems change but going about it without systems thinking," says Jonathan Raymond, president of the Stuart Foundation, located in San Francisco and focused on promoting the "whole child" in education. "When I got to the Stuart Foundation in the summer of 2014, it dawned on me that as a group of individuals we didn't have the knowledge, skills, or tools to really pull it off. And our thinking about the work wasn't explicit enough." With external support, over the next six months Raymond worked to build his and his staff's capacity to think systemically.

Eventually, the Stuart Foundation identified that one of its key approaches to operating more effectively would be building better relationships, specifically relationships with their partners. Raymond and his team realized that this had direct implications for the culture of the foundation itself. "When we surveyed grantees, we got dinged about how we didn't really know our partners well. And so that helped us to focus on the importance of building deep, trusted relationships."

> Attempting to foster systems change without building the capacity to "see" systems leads to a lot of talk and very little results.

Over the past three years, Raymond and his staff have worked hard to "become better listeners" through a combination of regular staff retreats and ongoing coaching—learning how "the problems you see out there are connected to the problems in here." Says Raymond, "There's no systems change without organizational change and no organizational change without individual change."

Gradually, the attention to relationships and mental models has extended into the Stuart Foundation's grantmaking. In 2016, the foundation became the lead funder for a new Systems Leadership Institute. The institute focused on developing leaders from diverse roles (such as superintendents, NGO management teams, and state officials) into *systems leaders*—people who foster collaboration for systems change.[7] Raymond says, "The whole idea was that we would test this approach out on ourselves, and if it started to stick, we would expose our grantees and partners. We've had four semi-annual sessions now, and about 90 percent of our partners and grantees attended at least one of those sessions. Some of them have come back two or three times with different team members."

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7 "The Dawn of System Leadership," *Stanford Social Innovation Review*, 2015.
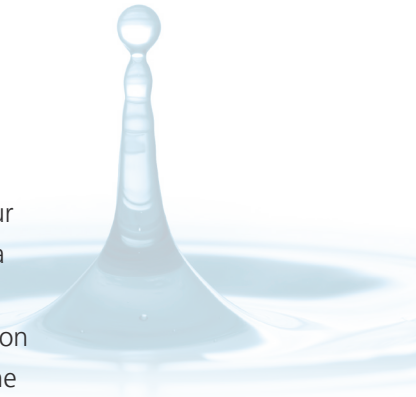
"There's a lot of thought about mental models, to really understand and to think about our broader work throughout the education system in California." This has led to supporting a major systems change initiative within the Department of Education's "Expanded Learning Division," as well as a major labor management initiative. In the latter, the Stuart Foundation is partnered with the California Teachers Association, the School Board Association, and the Administrators Group in efforts that have involved over 100 school districts "to reframe the dynamic" in the relationships that exist at the local level between the teachers' union and the district management team. "There are issues regarding collective bargaining," Raymond says, "that tend to get stuck, and so much of that is mental model work, being able to get everyone in the room and, around the table, start to uncover how we're thinking and how that thinking has been informed by our own experiences, and how we are best able to set aside judgment so that we can learn with and from each other. I think that has been really transformative."[8]

Playing a bigger role in deep changes like this doesn't just happen as a good idea. One needs to be in the mix with stakeholders, exploring shifting relationships, power dynamics, and mental models in one's own ways of operating. The more one is in the mix, the more deeply one will be changed by the work. Raymond adds, "Be patient with it. It's a long haul, this journey, and a lot of it is on the inside. As leaders, we have to be learners ourselves—we have to rethink, reinvent, and recommit ourselves. Are we willing to be vulnerable, and are we willing to go there? If not, I don't think we're going to achieve what is possible."

The Water of Systems Change

In a world of polarized interests and accelerating disparities, the challenges of achieving equitable progress at scale against complex social and environmental problems have become all the more daunting. For some, the response has been to accelerate efforts to change explicitly visible conditions, and to do so quickly. But we argue that now is the time to focus even more on the implicit or less publicly acknowledged key systems change conditions to truly increase the lasting impact of your efforts.

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8 An inspiration for this project has been the research by Saul Rubinstein that shows that "Where you have collaborative relationships amongst the adults in school districts, students perform at higher levels"—just as Tony Bryk had showed a decade earlier how, in over 100 public schools, "relational trust" improved test scores. See Rubinstein, S., & McCarthy J. (2010). *Collaborating on School Reform: Creating Union-Management Partnerships to Improve Public Schools*. School of Management and Labor Relations, Rutgers University; Bryk, A., & Schneider, B. (2002). *Trust in Schools. American Sociological Association: Rose Series.*

As the notion of systems change continues to ignite philanthropy's imagination, it is important to keep in mind that systems change, as a way of making real and equitable progress on critical social and environmental problems, requires exceptional attention to the detailed and often mundane work of noticing and acting on much that is implicit and invisible to many but is very much in the water. Making big bets to tackle a social problem without first immersing yourself in understanding what is holding the problem in place is a recipe for failure. On the other hand, bringing attention to shifting the power dynamics at play, identifying where people are connected or disconnected from others who must be part of the solution, exposing the mental models that inhibit success in policy change, and investigating the ways in which the foundation's internal conditions help or hinder external aspirations—this is the nature of successfully changing systems. This is systems change.

> Real and equitable progress requires exceptional attention to the detailed and often mundane work of noticing what is invisible to many.

About the Authors

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About FSG

FSG is a mission-driven consulting firm supporting leaders in creating large-scale, lasting social change. Through strategy, evaluation, and research we help many types of actors—individually and collectively—make progress against the world's toughest problems.

Our teams work across all sectors by partnering with leading foundations, businesses, nonprofits, and governments in every region of the globe. We seek to reimagine social change by identifying ways to maximize the impact of existing resources, amplifying the work of others to help advance knowledge and practice, and inspiring change agents around the world to achieve greater impact.

As part of our nonprofit mission, FSG also directly supports learning communities, such as the Collective Impact Forum, the Shared Value Initiative, and Talent Rewire, to provide the tools and relationships that change agents need to be successful.

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