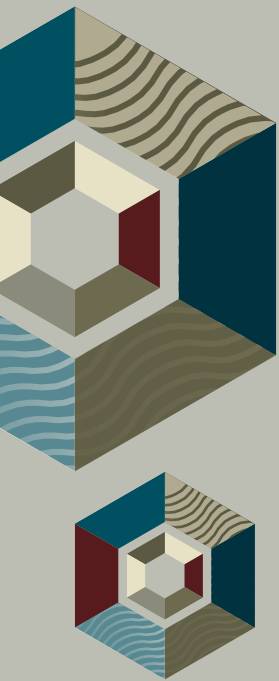




SYSTEMS GRANTMAKING RESOURCE GUIDE





For more information, please visit this publication's companion website at <http://systems.geofunders.org>.

Grantmakers for Effective Organizations is a diverse community of more than 500 grantmakers working to reshape the way philanthropy operates. We are committed to advancing smarter grantmaking practices that enable nonprofits to grow stronger and more effective at achieving better results. The GEO community provides grantmakers with the resources and connections to build knowledge and improve practice in areas that have proven most critical to nonprofit success. We help grantmakers strengthen relationships with grantees, support nonprofit resilience, use learning for improvement and collaborate for greater impact. For more information and resources for grantmakers, visit www.geofunders.org.

Management Assistance Group co-creates the capacities and conditions needed to share resources and power within and across systems in just ways. We provide consulting, coaching, and research services; run innovation labs; and facilitate movement networks and cross-sector systems change initiatives – addressing structures, strategies, hearts and minds. We have worked with over 1,500 networks, grantmakers, nonprofit organizations and other social-sector actors to bring about a vision where everyone has the opportunity to realize their potential, live life fully, and sustain a healthy planet. To learn more, visit www.managementassistance.org.

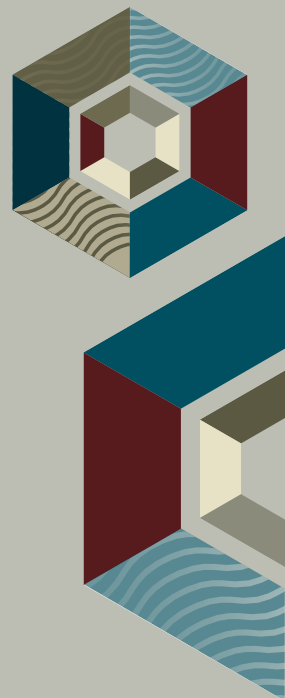
Systems Grantmaking Resource Guide was produced with funding provided by The David and Lucile Packard Foundation. For more information about the foundation, visit www.packard.org.

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AN INVITATION TO EXPLORE SYSTEMS GRANTMAKING

We are excited to share this resource guide, which consolidates and describes a set of tools, frameworks and processes that analyze and make sense of systems.

Like many funders and nonprofits, The David and Lucile Packard Foundation is continually evolving as we explore new ways to make lasting and effective contributions in the areas we care about most: improving the lives of children, enabling the creative pursuit of science, advancing reproductive health, and conserving and restoring the earth's natural systems. Thinking big is part of how we do our work, and so systems thinking is an important part of our approach.

At the Packard Foundation, we are interested in resources that provide a greater understanding of the fields in which we work and can help identify catalytic opportunities to change complex systems.

For example, our Western Pacific team hopes to understand what set of investments will help build the local, provincial and national capacity in Indonesia to sustainably manage fishery resources. In our Organizational Effectiveness program, we work to strengthen not only the leadership, management and operations of our core grantee partners but also the networks and fields in which they operate.

Through the resources in this guide, we hope to answer questions including the following:

- Who is in a system, and how do these players influence each other?
- How does change happen in a given system?
- What is the capacity of a system to change?
- Where and how do I use my limited resources to spark this change?
- How will I know in real time if change is occurring in a system?
- How can I learn and quickly adjust my strategy as a result of these changes?

In 2014, we created an internal learning group to explore various forms of assessment and how they may be used to inform grantmaking. We learned that there was limited information available on systems

resources. With this need in mind, **the foundation partnered with Management Assistance Group and Grantmakers for Effective Organizations to create an interactive and accessible resource guide for grantmakers and nonprofits working at the system or field level.** Through research, interviews and experimentation, we have assembled a selection of systems resources for the social sector.

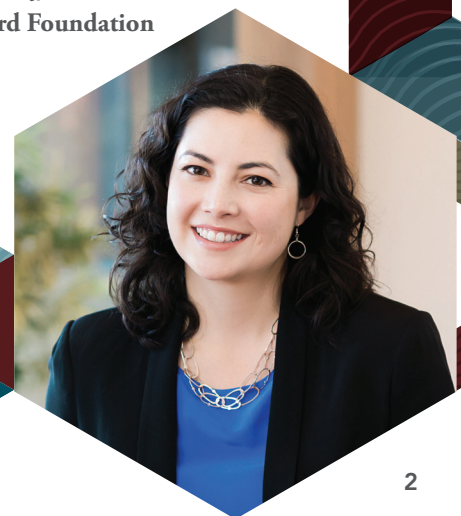
These topics are not new. The social sector has been curious about systems resources for more than 25 years. Ongoing conversations on these topics continue at The Aspen Institute and American Evaluation Association, among other venues. What is presented here intends to be additive and supportive of this dialogue, and to provide an accessible entry point to those new to this work.

We hope these resources support the social sector in our collective aim for increased impact on the issues and in the communities at the heart of our work. Please experiment with this information and apply it to the challenges you are facing.

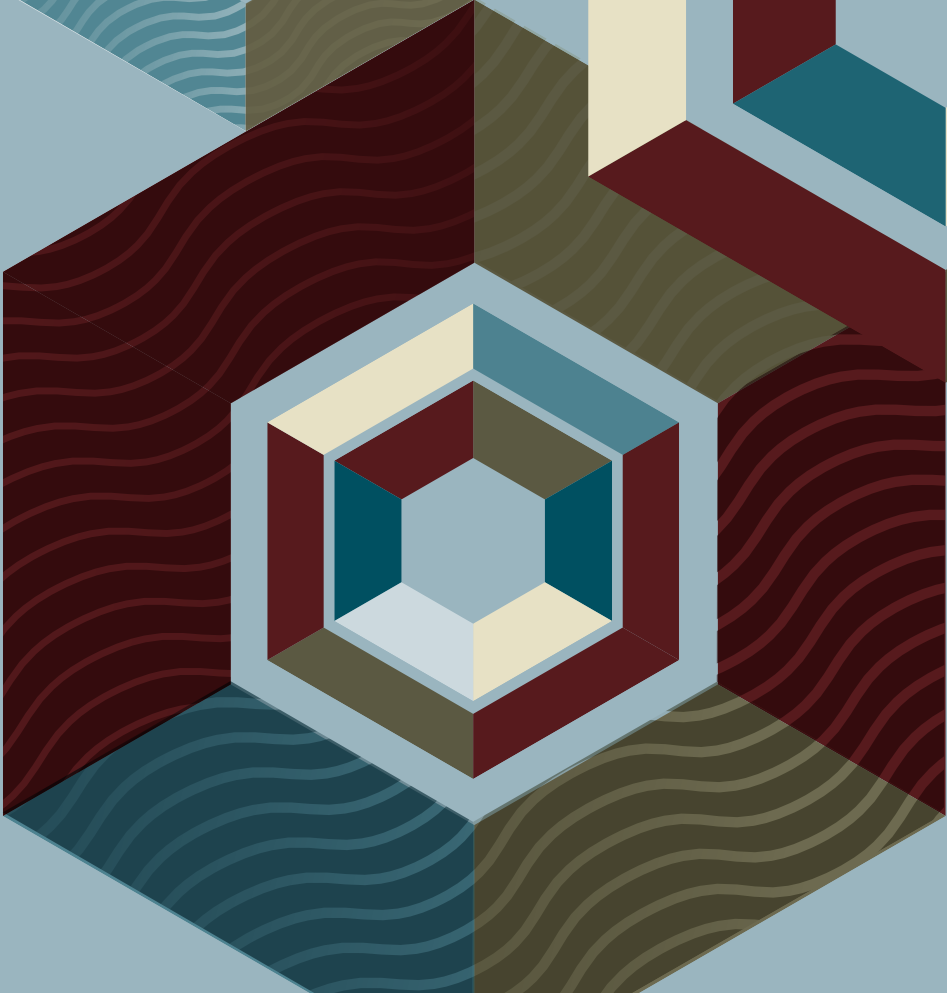
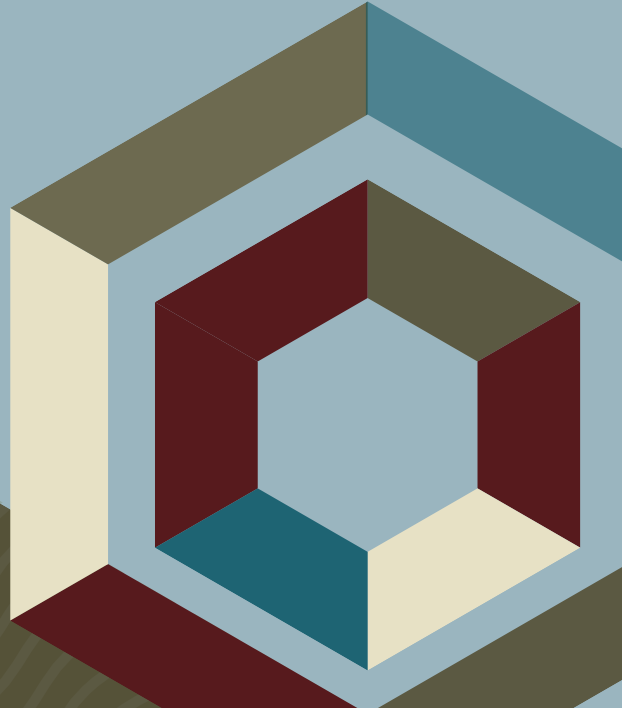
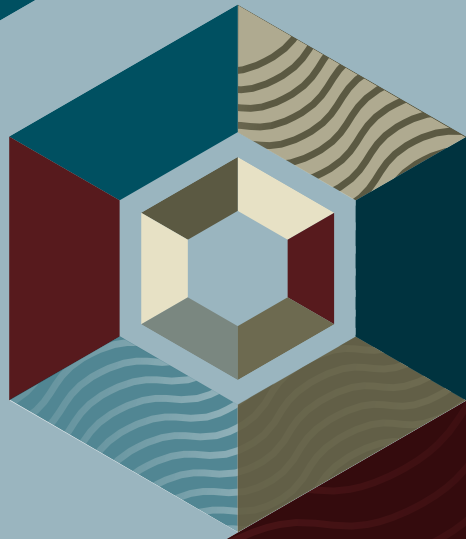
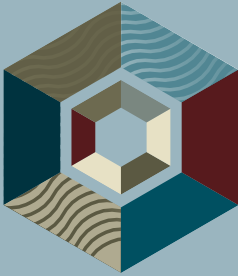
You can access additional resources online, including a self-assessment for non-grantmaking organizations and further reading, at <http://systems.geofunders.org>. Then, share your experiences with the growing community of systems thinkers.

Together, we will strengthen our practices.

Jamaica Maxwell
Program Officer, Organizational Effectiveness
The David and Lucile Packard Foundation



INTRODUCTION TO SYSTEMS GRANTMAKING



WHY SYSTEMS GRANTMAKING?

Philanthropy is ever on a quest to increase effectiveness. Over the last few decades, there have been efforts to be more proactive, strategic, outcomes focused, learning oriented and inclusive. Along this journey, grantmakers have increasingly recognized that impact does not happen in isolation. The daunting problems facing society today are deeply embedded in a web of intractable issues, fragmented relationships and unpredictable events. As a result, philanthropy cannot focus on one issue or set of grantees and achieve long-term change. Instead, grantmakers are trying to influence the bigger picture in all its complexity.

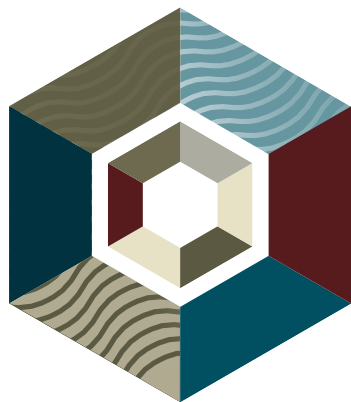
We call grantmaking that analyzes and influences systems and learns about systems change “systems grantmaking.” This is not a new type of grantmaking. It is a way of thinking about and approaching the grantmaking that philanthropists already do. A plethora of resources — frameworks, processes and tools — exist to support systems change, and many of these are being redesigned for grantmaking purposes.

WHAT IS A SYSTEM?

A system is a **set of parts** (e.g., policies, norms, geographic features, people, forces) that are **interconnected**. Systems are **bounded**, which means that people can specify the boundaries for the system. The parts can move in and out of this permeable boundary (e.g., organizations identifying or not identifying as part of a field). Systems are also **dynamic**, which means that they continually change over time.

A system can be **nested** within another system like Russian dolls (e.g., a school in a school district in the education system). Systems may **overlap** without being fully subsumed like a Venn diagram (e.g., education, health and juvenile justice systems overlapping in relation to academic achievement). Grantmakers might think of an individual, an organization or a network as a system. However, this guide is focused on larger complex systems like fields, issues, sectors, movements or regions.

Systems change refers to changing the parts and their relationships within a system with the understanding that this change will have ripple effects. Systems change often focuses on structures, policies and processes, but these are only some of the ways to change systems. Other ways include shifting resources, values, power, mindsets, infrastructure and many more.



“Originally, we had a responsive grantmaking approach. Then we moved to foundation initiatives that were portfolios focused on a big issue. We still do both, but we realized after spending millions over the years that we were not having the systems impact we needed and wanted due to the complexity and size of the issues. So we redefined our role; we are curators or stewards of the ecosystem around an issue. As a foundation with an ability to take risks, and as a politically-neutral player not looking for money, we can be the connective tissue between parts of the ecosystem. Grants to charities are now complemented by a robust impact investing strategy, network building within a domain and across sectors, strengthening of community organizations, and investment in social innovation approaches such as labs and developmental evaluation.”

– John Cawley, The J.W. McConnell Family Foundation



A NOTE TO OUR NONGRANTMAKING SOCIAL-SECTOR COLLEAGUES

Although this resource guide primarily addresses funders, much of the information presented translates well to all social-sector players. To put these resources into practice in order to change systems, funders and other social-sector players must work together.

We recognize that many social-sector colleagues are familiar with systems thinking and use a variety of tools, frameworks and processes to understand, navigate and change systems. We invite you to use this guide to

- consider how you might partner with others in the system to advance your mission;
- explore resources that you may use for systems change efforts;
- understand funder perspectives on supporting systems change; and
- learn, together with your funders, about systems grantmaking.

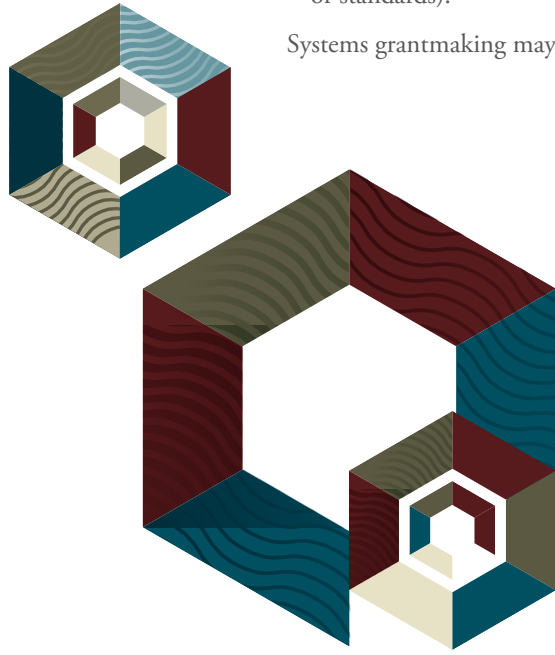
We encourage you to take a Systems Change Self-Assessment, exclusively designed for social-sector organizations, at <http://systems.geofunders.org>.

WHAT IS SYSTEMS GRANTMAKING?

Systems grantmakers and systems thinkers in the broader social sector

- define the boundary of the systems they are seeking to influence;
- try to understand the relationships among system parts, relationships between the parts and the whole system, and what is emerging beyond the parts;
- assume that the future may be unpredictable and people may disagree about possible solutions; and
- experiment with multiple ways to change the system (e.g., coordination, advocacy, new products or standards).

Systems grantmaking may include but is not the same as collaboration or networks.



“ Many people are throwing systems mapping at very complex issues in an abbreviated form. We’ve seen a lot of these efforts ending without any real transformation in participants’ mindsets about how to move forward. Something we’re learning is that the discussions and collective learning among stakeholders is where the value lies. It’s what develops our skills to work with complexity in planning, actions, network design, and governance. Systems mapping isn’t a technical fix, which a lot of people want it to be. It is really shifting the way we 1) look at complex social issues and the key dynamics involved and 2) engage a more diverse set of actors that are intentionally connected and aligned to have broader impact.”

– Ruth Rominger, Garfield Foundation

WHAT IS A SYSTEMS MINDSET?

It is the grantmaker's mindset and intent that defines systems grantmaking — not the tool, process or framework. Our understanding of a systems mindset is continually evolving as philanthropists learn from putting theory into practice. However, there are six elements that are critical to systems grantmakers and thinkers today. We share these below along with an example of how systems thinkers could apply each element to climate change.

1. **Systems grantmakers seek to understand the dynamic nature of a continually evolving system that is more than the sum of its parts.** Systems thinkers look at ecosystems, which are interconnected entities that cannot be reduced to discrete parts. As one component changes, other parts of the system change in response, and vice versa. Completely new properties may emerge in a subset of the system (among some parts) or can be generated across the whole system.

THE MINDSET IN ACTION. Systems thinkers addressing climate change explore the intersections between ecological systems and social systems at a global scale. They see how ocean currents, wind patterns, agriculture, fossil fuels, trade agreements, market incentives, consumer pressure, lawmakers, greenhouse gases and many other parts of the system interact.

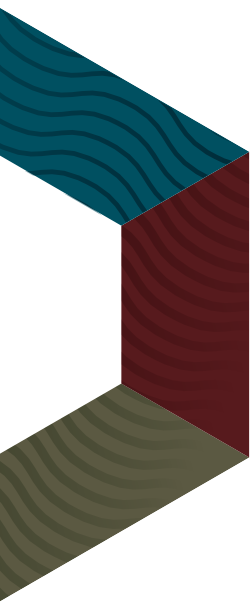
2. **Systems grantmakers do not believe that pulling a lever(s) will necessarily lead to a specific outcome(s).** Systems thinkers understand that every part of the system affects and is affected by other parts of the system. Cause and effect are not necessarily linear. They can be two-way, circular, and disproportionately large or small. They cannot be predicted definitively.

Some systems thinkers believe that reducing fossil fuels will reduce greenhouse gas, which will reduce the pace of climate change. However, there isn't a simple equation to figure out how much reducing one will impact the others. What affects each of these variables also can be unpredictable. For instance, reductions in trans fats in the food industry have gone hand in hand with an increased use of palm oil substitutes, deforestation and more greenhouse gas. Although the connection is clear in retrospect, it may have been hard to predict the relationship between trans fats and greenhouse gas in advance.

3. **Systems grantmakers look for patterns in systems but do not expect these patterns to stabilize over time.** When systems thinkers look for patterns in how systems evolve, they often don't see a steady equilibrium. Instead, they see irregular patterns such as peaks and troughs (e.g., the stock market's ups and downs), moments when the system temporarily reorganizes into a new pattern (e.g., a town that experiences a disaster and then recovers), and tipping points when the system changes and cannot go back (e.g., the impact of the industrial revolution or the civil rights movement on society).

Climate change is no longer commonly viewed as a cyclical issue that will stabilize or reverse. Instead, systems thinkers are looking for unexpected rates of change (e.g., glacial melting happening faster than anticipated), new patterns (e.g., changes in ocean currents) and irreversible tipping points.





4. **Systems thinkers take a continuous learning, experimental and adaptive approach.** At the beginning, grantmakers intentionally shape the grantmaking conditions to support a direction for systems change. They then continually experiment with ways to accelerate systems change and adapt what they are doing based on their vision and what they learn.

Some grantmakers have broadened their focus from stopping climate change to mitigating the effects of climate change. Other funders have further adapted their strategy based on the perspective of people disproportionately affected by climate change (e.g., funding community-driven planning and climate resiliency innovations). A few funders are using human-centered design to invest in ongoing experimentation, which will also continually influence their grantmaking strategy.

5. **Systems thinkers collaborate with and engage a diverse set of stakeholders (including those who are directly affected by the system).** Bringing diverse people together helps grantmakers glean new insights, see the whole system and its parts and relationships more clearly, and coordinate a range of interventions across time and geography. It can also cause people to self-organize; this interaction could catalyze changes to the system that were not previously possible.

People who are focused on climate change often work in silos or at cross-purposes. A funder may convene these different stakeholders (such as nonprofits, businesses, and funders or others working on environmental, economic and community resiliency solutions) to develop a shared understanding of the system and opportunities for systems change. These people could then self-organize to coordinate across a region, shift resources from one solution to another and/or generate new solutions.

6. **Systems thinkers are aware of their own power and identity and understand the different amounts and types of power among groups.** They monitor the larger context of power relations (e.g., social, racial, cultural, political, economic) that can visibly or invisibly impact how systems function and change. They are more likely to include the least powerful members of a system. They also adapt their own role in influencing systems change as needed.

Some funders intentionally break down the silos between funders and grantees. They work together to make decisions about what systems change strategies to fund rather than have the grantmaker alone make these decisions.

It takes time to understand and practice these elements of a systems mindset. Reading this guide is a good first step. As your fluency in systems thinking increases, it will be easier to convert existing practices into systems grantmaking practices. With a systems mindset, grantmakers may also effectively experiment with new practices, such as applying the resources in this guide or combining them into a larger systems change process.

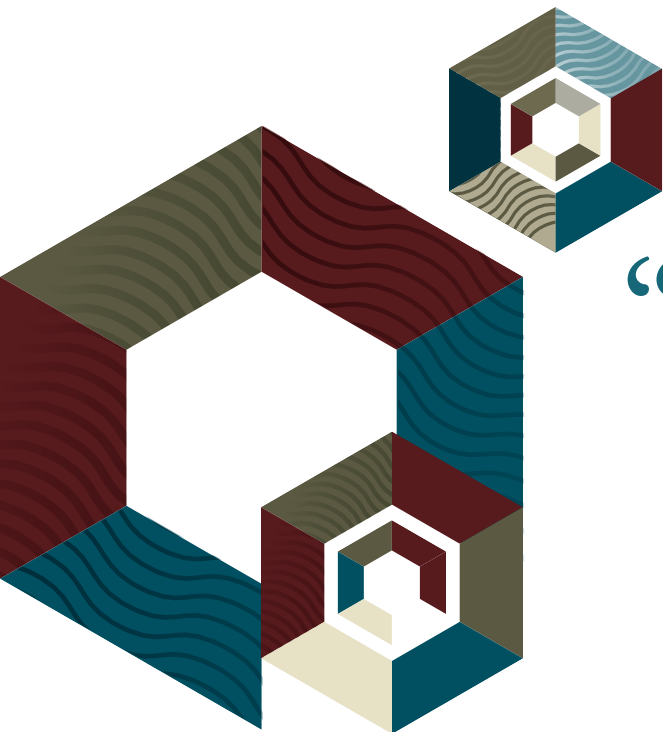
WHEN IS SYSTEMS GRANTMAKING APPROPRIATE?

Grantees operate in systems. A domestic violence shelter operates in a larger system (e.g., a society with laws, perceptions, and attitudes about violence against women and other people). A junior baseball league operates in a larger system (e.g., a community with a parks and recreation system and a society with varying cultural norms about fitness, health and play). A national network for immigration reform tries to influence the political system (e.g., the beliefs, habits and structures around voter engagement).

In each of these examples, a systems mindset could help grantmakers **understand how the broader system limits and enables grantee effectiveness and how grantees influence that system**. A grantmaker may identify additional ways that it can then influence the system and support its grantees. It may choose, for example, to connect domestic violence shelter grantees with organizations that affect public opinion, to partner with funders of parks to support fitness activities including junior baseball, or to gather and disseminate research on voter engagement across a range of issues.

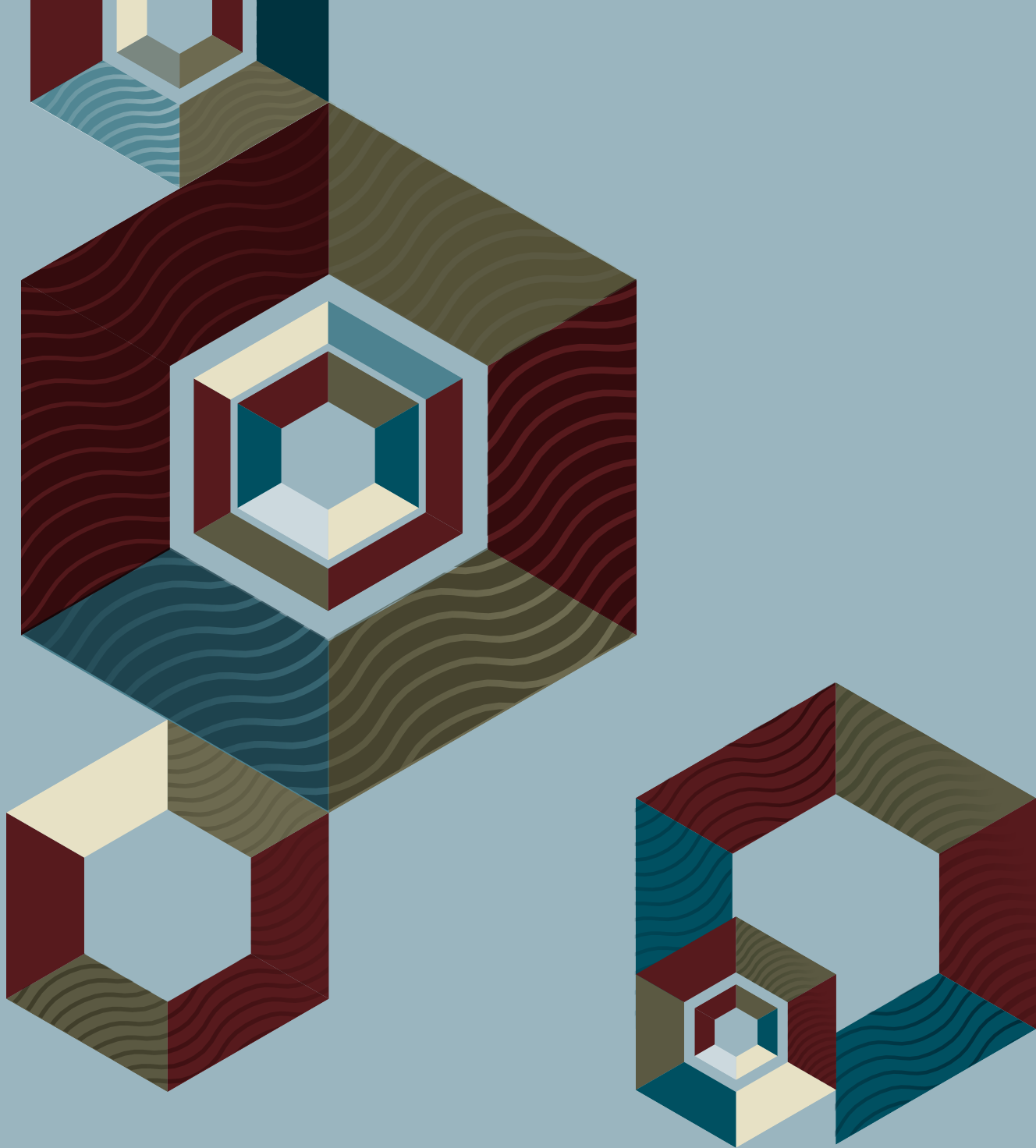
While systems grantmaking is always an appropriate approach, **it is most important for complex situations where there are multiple solutions, little agreement on which opportunity to pursue, and some irrationality or lack of predictability**. Systems grantmaking is also a valuable approach when grantmakers work with grantees who are trying to change a system or when grantmakers are trying to intervene in a system more directly.

Being a systems grantmaker is an ongoing process of learning. The field continues to develop systems theory and experiment with ways to apply theory to the real world. Moreover, a number of practitioners are developing processes, frameworks and tools to support systems grantmakers (you can find some of these linked at <http://systems.geofunders.org>.) To analyze whether your organization integrates a systems mindset into your grantmaking, take the Systems Grantmaking Self-Assessment on page 10. The results will also help you navigate through this guide.



“ Leadership from the top embracing a systems grantmaking and investing approach makes it easier to do. I always get asked, ‘Does your board know what you are doing?’ They are comfortable with us playing in the sand box, testing hypotheses, learning from mistakes and developing a coherent strategy over time, and accepting modest results in the short term. They get that successes come years later — and we do have enough successes that they believe this is the way to go. It is about creating conditions and deep-rooted relationship building over years to create big neighborhood change. It isn’t a quick fix project.”

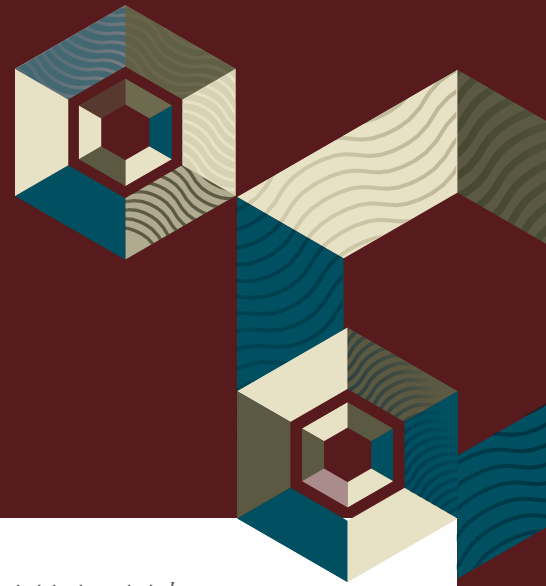
– John Cawley, The J.W. McConnell Family Foundation



SYSTEMS GRANTMAKING SELF-ASSESSMENT

Based on your answers, we suggest some ways that this resource guide can support you as you increase grantmaking effectiveness. Our social-sector colleagues can take a Systems Change Self-Assessment, exclusively designed for social-sector organizations, at <http://systems.geofunders.org>.

HOW DO YOU AND YOUR ORGANIZATION INTEGRATE A SYSTEMS LENS INTO YOUR GRANTMAKING?



INSTRUCTIONS

If your grantmaking portfolio has a wide range of programs or initiatives, it is best to focus on one program or initiative when answering these questions.

For the following five questions, please choose the answer that best applies to your situation. If more than one answer applies fully, pick the answer farthest down on the list.

1. You have selected a set of grantees who: (pick one)

- Operate in isolation from each other in different fields or geographies or with different constituents. They have little to no interaction.
- Operate in the same system (e.g., field, geography, constituency) but work independently.
- Operate in the same system or in interconnected systems and sometimes work with each other intentionally to understand and influence the system(s).
- Have a reputation for being systems thinkers. They continually reflect on the broader ecosystem and successfully work with others to shift the system.

2. Your grantmaking is centered on an issue or field where: (pick one)

- Cause and effect are predictable. You know with a high degree of certainty that if you make an intervention of X, then Y will happen.
- Cause and effect can be predicted given sufficient information. You conduct experiments to test hypotheses about what will happen when you make an intervention. Over time, you predict with greater certainty what will happen when you make intervention X.
- Cause and effect cannot be predicted, but you can still make assumptions about the future based on cause and effect in the past. You map out how variables interacted in the past to identify cause-and-effect relationships. You use this map to select intervention X with the assumption that Y might change, knowing your assumption might be wrong.
- Cause and effect are not predictable, and you cannot make assumptions based on the past. You are constantly testing out ways to influence the system and reflecting how patterns and structures emerge and change iteratively. You do not try to predict the relationship between cause and effect.

3. Your grantmaking strategy is: (pick one)

- Created prior to grantmaking and followed closely.
- Created prior to grantmaking and amended as needed.
- Articulated at a high level prior to grantmaking and developed based on learning over time.
- Emergent through a process that is iterative and experimental, tests many ideas, incorporates reflection time at regular intervals and is focused on learning over time.



4. Your grantmaking strategy is significantly influenced by: (pick one, remembering to pick the answer farthest down on the list if more than one answer applies)

- a. Your colleagues in your organization, including staff and/or board members.
- b. Other grantmakers.
- c. Stakeholders outside of philanthropy who do NOT make specific recommendations or final decisions. This includes people who are directly affected, including grantees, issue experts and decision-makers who would not be eligible for funding, among others.
- d. Stakeholders outside of philanthropy who DO make specific recommendations or final decisions. This includes people who are directly affected, including peers of grantees, among others.

5. Your theory of change aims to: (pick one)

- a. Deliver or expand a service that alleviates immediate needs around a particular problem (e.g., soup kitchens or species preservation).
- b. Address the root causes of a problem (e.g., increase early childhood education or reduce fossil fuels).
- c. Create an alternative system (e.g., alternative education or local sustainable economies).
- d. Build a movement with many diverse organizations and individuals using multiple strategies simultaneously to change systems and power dynamics at scale (e.g., reproductive justice).

For the following question, please check all answers that apply.

6. To make meaning of the system, learn about how it evolves and influence it over time, you consistently: (check all that apply)

- Pay attention to how you are drawing system boundaries and their significance in determining who is in and out of the system.
- Incorporate the perspective of stakeholders who are directly affected.
- Map out the social network and continually reflect on how these relationships, group dynamics and power differences among network actors might affect the system over time.
- Use a range of tools and processes to ensure that people of differing cultures, language fluency and power can meaningfully contribute to systems change.
- Surface differences among stakeholders and have challenging yet transformative conversations to address these differences.
- Think about the interrelationships between all the parts in a system (not just the people), their relationships to the whole and what emerges out of the whole.
- Work to see underlying structures as well as patterns of behavior and events that change over time in the system.
- Think dynamically about how a grantmaking intervention may be affected by different assumptions (e.g., nonlinearity), contexts (e.g., timing or geography) and unintended consequences.
- Have rapid feedback loops to learn how a grantmaking intervention is and is not influencing system structures and behaviors in real time (i.e., less than two months).
- Question your mental models and surface unconscious biases to understand how they influence your ideas and choices about the system.
- Work with internal teams to check key assumptions, openness to new information and readiness to change.
- Continually learn how to adjust and expand your grantmaking role to influence the system appropriately.

UNDERSTANDING YOUR ASSESSMENT RESULTS

Your answers represent a point in time — where you currently are in your grantmaking. They may also change for each program or initiative given its unique context. They do not necessarily represent where you would like to be or where you are heading.

To understand your results:

1. For questions 1 through 5, A counts as 1, B counts as 2, C counts as 3, and D counts as 4.

Complete the following:

- a. Number of “A” responses: × 1 =
- b. Number of “B” responses: × 2 =
- c. Number of “C” responses: × 3 =
- d. Number of “D” responses: × 4 =
- e. Sum for the subtotals above: (Subtotal X)

2. Count the number of boxes checked for question 6. Enter it here: + (Subtotal Y)

3. Add subtotals X and Y. Enter your total score here:

Read about your profile below based on your total score.

HERE IS WHAT YOUR SCORE MEANS

What have you learned about where your grantmaking institution is today with respect to using a systems grantmaking approach? Given your grantmaking values, vision and context, where do you want to be? You may decide that systems grantmaking isn't for you, or you may decide that your institution is right where it should be. Either scenario is fine. If you want to strengthen your systems grantmaking, consider the following:

- Reinforce and build on your strengths (i.e., C and D responses or checked boxes for question 6).
- Learn more about unknown or less utilized areas (i.e., A and B responses or unchecked boxes for question 6).
- Increase the frequency or depth of your practice.

0 to 10: Systems could be a new lens for you or for your grantmaking institution.

Use this resource guide to begin to develop a systems mindset and to learn how to apply systems tools, processes, and frameworks to your grantmaking. Read the introduction to systems grantmaking (page 4) and think about whether systems grantmaking is right for you or your institution. If it seems relevant, consider how to define the system and the implications of those boundaries for your grantmaking. Also, read about Collaboration Muscles and Mindsets (page 21), which builds systems mindsets and skills like weaving networks with the people most affected, collaborating with unlikely allies, developing communication and conflict resolution skills, and navigating power differences. Finally, review some of the descriptions of the featured resources (page 19) to understand how grantmakers have used them, starting with the ABLe Change Framework and Power Analysis.

11 to 16: You and your grantmaking institution may have begun to incorporate a systems mindset into your grantmaking approach.

You could use this resource guide to expand your thinking about what is possible for systems grantmaking at your institution. Read the introduction to systems grantmaking (page 4) to understand the six systems mindset elements.

If you face institutional obstacles to incorporating a systems mindset fully into grantmaking, consider taking some initial steps within existing processes to enhance your systems grantmaking approach. Some of the easier practices include thinking about how you bound the system, selecting grantees that collaborate to influence the system, getting the perspective of people who are directly affected and understanding social network dynamics. This can lay the foundation for future exploration of Containers, Differences and Exchanges Model (page 33) or Social Network Analysis (page 41).

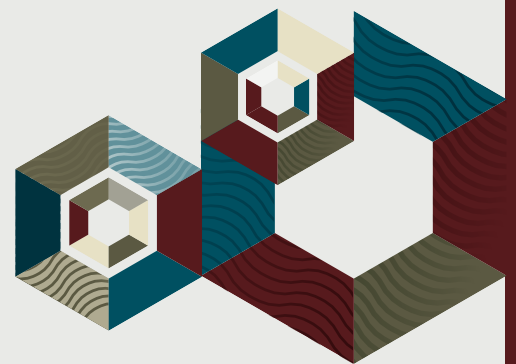
If you do **not** face institutional obstacles to incorporating a systems mindset fully into grantmaking, consider clarifying institutionwide language for your grantmaking approach. Read “Leveraging Grant-Making – Part 2: Aligning Programmatic Approaches With Complex System Dynamics,” by David Peter Stroh et al.,¹ about how the W.K. Kellogg Foundation used systems grantmaking. Explore the resources (page 19) to learn about the breadth of systems resources that you may apply at different stages of grantmaking. Finally, consider experimenting with a resource that fits within your existing grantmaking processes.

17 to 23: You and your grantmaking institution may already incorporate a systems mindset into your grantmaking approach and may be building the skills, competencies, structures and processes to support systems grantmaking.

You could use this resource guide with your colleagues to deepen systems grantmaking throughout your institution. Share the introduction to systems grantmaking (page 4) with staff and/or trustees and discuss what people are learning about systems grantmaking today. If you do not already have it, consider creating consistent language about systems across your grantmaking institution. Read the case examples about how the Garfield Foundation catalyzed the RE-AMP Network as a systems change leader.² Then review your assessment answers to identify one or two institutional practices that could be adopted so that systems grantmaking becomes a way of thinking and doing for all staff and board members. Also, review the complete list of resources (page 19) to identify ones that you might want to try, such as the Containers, Differences and Exchanges Model; Causal Loop Mapping; or Systems Mapping.

24 to 32: You and your grantmaking institution may be leaders in systems grantmaking.

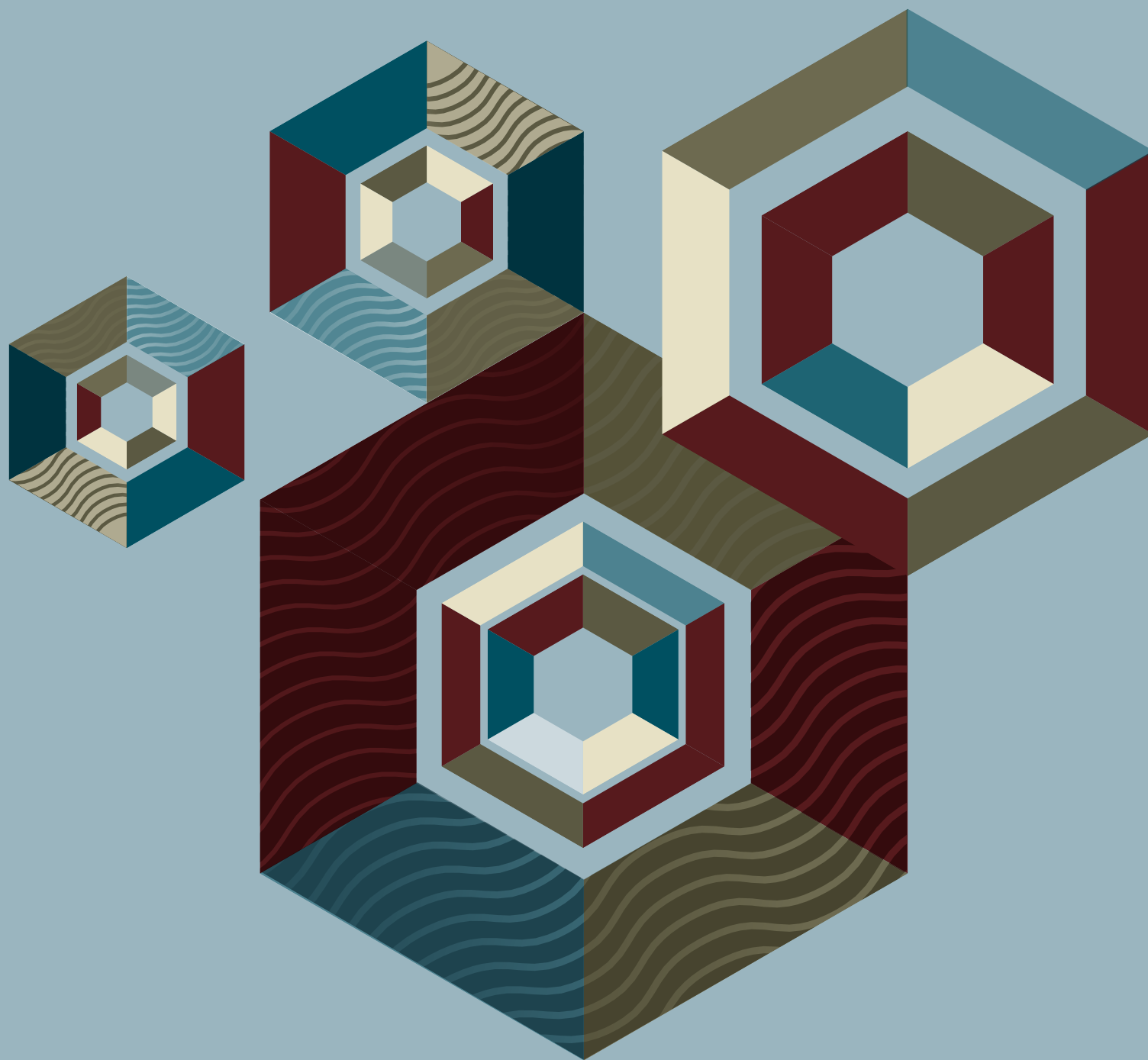
If so, you could use this resource guide to explore more advanced resources like the Four-Stage Systemic Change Process, Rapid Realist Review, Theory U, SenseMaker and System Dynamics Modeling to see if there are new techniques to incorporate into your grantmaking. Consider using a grantmaking initiative to explore and compare multiple systems grantmaking resources or to develop staff and grantee capacity for systems work. You could also seek out the additional resources available online at <http://systems.geofunders.org> to go deeper into complex systems. Finally, you could use this resource guide to engage stakeholders who are unfamiliar with a systems mindset.



¹ David Peter Stroh et al., “Leveraging Grant-Making — Part 2: Aligning Programmatic Approaches With Complex System Dynamics,” *The Foundation Review* 1, no. 4 (2010).

² RE-AMP Case Studies: <http://www.monitorinstitute.com/what-we-think/transformer/#transformer> and <http://engage.rockefellerfoundation.org/story-sketch/re-amp/>.

USING THE RESOURCES IN THIS GUIDE



ABOUT THE RESOURCES

Management Assistance Group conducted more than 30 interviews with systems experts and philanthropic leaders as well as a review of more than 175 websites, articles, books and videos. We identified an ever-increasing number of systems grantmaking resources. We realized that, with a systems mindset, almost any grantmaking tool, process or framework can be repurposed to support systems grantmaking efforts. The tools, processes, and frameworks featured in this resource guide are not a comprehensive representation of those that grantmakers could use for systems grantmaking. **Instead, we have selected a set of commonly practiced and promising resources.**

You may be familiar with some of the resources that have long been used in the field for systems grantmaking, such as Landscape Scans. Other resources may not be familiar, such as the Social Movement Capacities Framework or Rapid Realist Review. Yet others, such as Developmental Evaluation or Collective Impact, may be familiar due to their use in other parts of the social sector. We've included these because they are either being repurposed for systems work or they inherently embrace a system grantmaking approach. As you find more resources that are useful for systems grantmaking, we invite you to share these with us online at <http://systems.geofunders.org>. You will also find additional resources on the site.

The following points are true about all of the resources included here:

- **A systems mindset** is essential for using the resources successfully. Many can be used to help you develop that mindset while others will be more successfully implemented by those experienced in systems grantmaking.
- **Multiple kinds of organizations** — grantmakers or other social-sector actors — may use the resources.
- They have a **track record** of successful implementation.
- They require **some level of expertise**, which could be obtained through trial and error, training or engaging an expert.
- Usually, the resources are **part of a broader systems change or strategy and evaluation process** and cannot be reduced to a single meeting or workshop. To this end, it may be helpful to have a facilitator for overall process design who can apply multiple tools, processes and frameworks over time as appropriate. Since systems change invariably involves working across differences in identity and power, such a facilitator should be competent in navigating these issues as well.
- They are continuously **evolving** to fit with the latest thinking about systems.
- They require **loosely defining the system's boundaries** upfront. Grantmakers need to be conscious of who and what is excluded by these boundaries and may need to refine the boundaries over time. We have not found any resources that can look at interconnected systems without boundaries.
- While some of the resources describe the network and power relations among system actors, **none are prescriptive about the role actors should take**. Grantmakers need to draw their own conclusions about their role in the system.
- They **cannot predict** what will happen. They may describe the past or present, but the future may unfold differently.
- They must be used and reflected on **iteratively** to capture the dynamic nature of systems, including how the system is changing during and after a grantmaking intervention. We have not found any resources that provide continuous, real-time information.

TRUST IS CRITICAL

While none of the resources focus on building trust, how grantmakers use the resources and the degree to which explicit attention is paid to power relations can contribute to building trust with grantees and the community.

- Unconscious individual and institutional bias can lead to the inadvertent exclusion of the least powerful stakeholders. To avoid this, grantmakers can be intentional about which stakeholders to include.
- Grantmakers can also be intentional about how stakeholders will participate in a resource. This includes being clear about their decision-making roles; having transparent communication before, during, and after; and considering how people of differing cultures, language fluency and power may meaningfully participate.
- For participatory processes, grantmakers can plan for conversations that may be emotionally charged, controversial and subject to multiple, conflicting interpretations that are often filtered through the lens of various identities (e.g., race, gender, class).
- Grantmakers can reflect on how power dynamics — rooted in constructs of race, gender, class, and other differences in institutional and positional power — are evolving among stakeholders and grantmakers throughout the process.

A KEY TO READING THE RESOURCE PROFILES

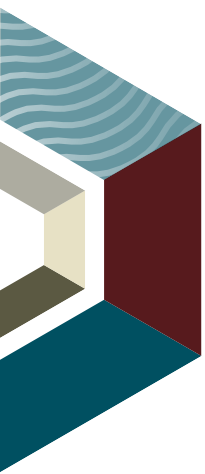
To select a resource to use, grantmakers should begin with clarity about what they are trying to achieve.

To help with this, we have categorized the resources in three ways: 1) the grantmaking stages when the resource is most useful; 2) the aspects of the system the resource will help grantmakers understand and influence; and 3) the type of resource. You can use these categories to match the resource to the job that needs to be done. Below we explain each in detail.

GRANTMAKING STAGES

This category will help you determine which resources could be useful during particular stages of the grantmaking process. However, many resources can be repurposed for a variety of grantmaking stages. We organized the grantmaking process into four stages, though grantmakers do not necessarily experience these stages sequentially or distinctly:

1. **Develop Grantmaking Strategy:** Resources in this category can help you understand the system, identify outcomes and determine grantmaking interventions.
2. **Identify and Select Grantees:** Resources in this category can help you understand who is in the system, the strength and content of their relationships, who is missing and the power dynamics among them.
3. **Shape and Monitor Grants:** Resources in this category can help you as you implement and refine your grantmaking strategy. Some of the more participatory resources in this category overlap with other grantmaking stages.
4. **Assess Impact and Learn:** Resources in this category can help you assess impact and learn. Since learning is often an iterative and emergent process in systems grantmaking, these resources may overlap with other grantmaking stages.



SYSTEMS QUESTIONS

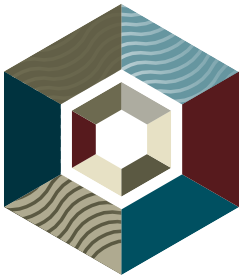
This category will help you determine which resources provide information on the specific aspects of the system you need to understand or influence. There are four questions about systems that the resources in this guide answer:

1. **People:** What is the social network and how can we influence it?
2. **Variables:** What are the events, activities, actions, behaviors and forces that affect the system, and how can we influence them?
3. **Patterns and Structure:** What are the patterns of behavior, structures and archetypes in the system, and how can we influence them?
4. **Learning:** How do we think and learn about the system?

RESOURCE TYPE

Are you a visual person? Do you prefer narrative stories? Are you process oriented? The four types of resources in this guide are the following:

1. **Visual Mapping:** These resources result in a visual representation of systems, each through a particular lens (e.g., social relationships, political power, issues and concepts).
2. **Narrative Reporting:** These resources analyze large amounts of data to describe all the elements in the system.
3. **Processes:** These resources include approaches for systems change that can be broken down into fluid stages involving stakeholder engagement in meaning-making and decision-making. They often include multiple types of resources.
4. **Theories and Frameworks:** These resources inform the lens through which a grantmaker uses other systems grantmaking resources.



In addition, we have included implementation-related information including amount of time, level of stakeholder participation and expertise needed. **Many resources can be adapted to meet your requirements, so consider adapting the resources to your specific situation rather than eliminating a resource that doesn't seem feasible at first glance.**



SHORTEST TIME

The shortest time period a grantmaker will need to apply the resource is:

- less than one month,
- one to five months,
- six to 12 months, or
- more than a year.



PARTICIPATION

The typical amount of participation the resource requires from grantees and other stakeholders is:

- not participatory,
- flexible from no/some participation to highly participatory, or
- highly participatory.



EXPERTISE

The type of expertise needed to apply the resource is:

- a skilled facilitator,
- someone who has been trained on the resource, or
- an expert with specialized knowledge or technology.

SYSTEMS GRANTMAKING
RESOURCES



RESOURCE OVERVIEW

The following charts provide an overview of the resources in this guide. Descriptions of each of the resources follow. Please visit <http://systems.geofunders.org> to filter these resources along other variables and to explore additional resources.

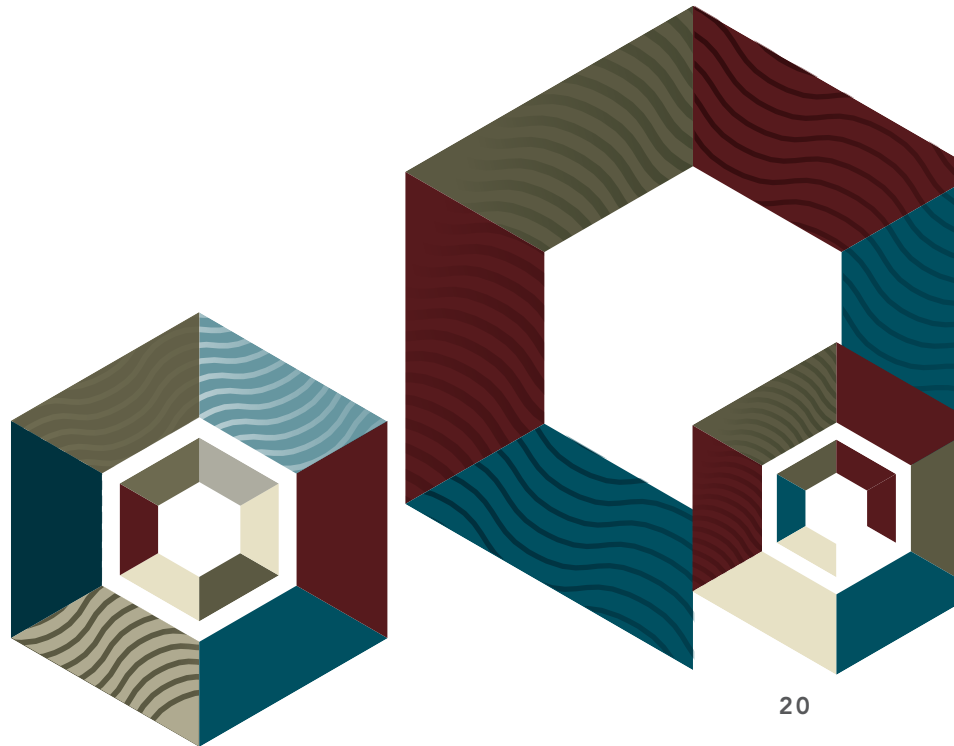
AT WHAT GRANTMAKING STAGES WILL YOU USE THE TOOL?

| | DEVELOP GRANTMAKING STRATEGY | IDENTIFY & SELECT GRANTEES | SHAPE & MONITOR GRANTS | ASSESS IMPACT & LEARN | PAGE NUMBER |
|--|------------------------------|----------------------------|------------------------|-----------------------|-------------|
| ABLE Change Framework* | ● | ● | ● | ● | 21, 29 |
| Causal Loop Mapping | ● | ● | | | 21 |
| Collaboration Muscles and Mindsets | ● | | | ● | 21 |
| Collective Impact | ● | ● | ● | ● | 22 |
| Community Assessments | ● | | | | 22 |
| Concept Mapping* | ● | | | | 22, 31 |
| Containers, Differences and Exchanges Model* | ● | ● | ● | | 23, 33 |
| Critical Systems Heuristics | ● | | | | 23 |
| Developmental Evaluation | | | ● | ● | 23 |
| Four-Stage Systemic Change Process* | ● | ● | ● | ● | 24, 35 |
| Landscape Scans | ● | ● | | | 24 |
| Power Analysis* | ● | ● | | | 24, 37 |
| Rapid Realist Review* | ● | ● | | | 25, 39 |
| SenseMaker | ● | | ● | ● | 25 |
| Social Movement Capacities Framework | ● | ● | | | 25 |
| Social Network Analysis* | | ● | | ● | 26, 41 |
| Stock and Flow Diagrams | ● | | | | 26 |
| System Dynamics Modeling | ● | | | ● | 26 |
| Systemic Action Research* | ● | ● | ● | ● | 27, 43 |
| Systems Mapping* | ● | ● | | | 27, 45 |
| Theory U | ● | ● | ● | ● | 27 |

*Pages feature both short descriptions and longer profiles with an example from the field

WHAT TYPE OF RESOURCE DO YOU NEED?

| VISUAL MAPPING | NARRATIVE REPORTING | PROCESSES | THEORIES & FRAMEWORKS |
|--|--|--|---|
| Causal Loop Mapping (page 21) | Landscape Scans (page 24) | ABLE Change Framework (page 21, 29) | Collaboration Muscles and Mindsets (page 21) |
| Concept Mapping (page 22, 31) | Rapid Realist Review (page 25, 39) | Collective Impact (page 22) | Containers, Differences and Exchanges Model (page 23, 33) |
| Power Analysis (page 24, 37) | SenseMaker (page 25) | Community Assessments (page 22) | Critical Systems Heuristics (page 23) |
| Social Network Analysis (page 26, 41) | Systems Dynamics Modeling (page 26) | Developmental Evaluation (page 23) | Social Movement Capacities Framework (page 25) |
| Stock and Flow Diagrams (page 26) | | Four-Stage Systemic Change Process (page 24, 35) | |
| Systems Mapping (page 27, 45) | | Systemic Action Research (page 27, 43) | |
| | | Theory U (page 27) | |



ABLE CHANGE FRAMEWORK

A six-step process for guiding stakeholders through systems change. The process includes defining the problem, engaging diverse perspectives, scanning the system for conditions influencing the problem, making sense of the data, developing a shared systems change agenda and facilitating a systemic learning process to create a continuous learning environment. It also involves improving implementation and building systems capacities and includes tools and exercises to guide the process. It is well suited for community change efforts. For more information, see the profile on page 29.

| | |
|-----------------------------|---|
| PARTICIPATION | Highly participatory |
| EXPERTISE | Someone who has been trained on the resource |
| SHORTEST TIME | Six to 12 months |
| GRANTMAKING STAGE(S) | Develop grantmaking strategy, Identify and select grantees, Shape and monitor grants, Assess impact and learn |
| SYSTEM QUESTION(S) | People, Variables, Learning |
| RESOURCE TYPE | Process |

CAUSAL LOOP MAPPING

A visual mapping technique that shows the interconnected variables causing system outcomes and the direction of influence among variables. Causal Loop Maps usually do not show magnitude of influence, so it is difficult to determine the net impact of multiple variables. By dampening, amplifying, or breaking relationships among these variables, one can influence the system. It is helpful when trying to address a specific problem or issue within a system. This technique can be used independently or as a part of a Systems Mapping process (see page 45). For more information, see “Guidelines for Drawing Causal Loop Diagrams,” by Daniel Kim.³ You can find a more in-depth profile on <http://systems.geofunders.org>.

| | |
|-----------------------------|--|
| PARTICIPATION | Flexible from no/some participation to highly participatory |
| EXPERTISE | Someone who has been trained on the resource and/or An expert with specialized knowledge or technology |
| SHORTEST TIME | One to five months |
| GRANTMAKING STAGE(S) | Develop grantmaking strategy, Identify and select grantees |
| SYSTEM QUESTION(S) | Variables |
| RESOURCE TYPE | Visual Mapping |

COLLABORATION MUSCLES AND MINDSETS

A framework of the capacities needed for systems thinking, collaboration and innovation, and a set of “workouts” for developing those capacities. There are several mindsets, such as innovation, slow down to speed up, flexible reality, shared understanding and “we.” There are also 16 muscles for nurturing relationships, sensemaking, doing tasks and participating in dialogue while navigating power. For more information, see “Faster than 20” by Eugene Eric Kim.⁴

| | |
|-----------------------------|---|
| PARTICIPATION | Highly participatory |
| EXPERTISE | Someone who has been trained on the resource |
| SHORTEST TIME | Less than one month |
| GRANTMAKING STAGE(S) | Develop grantmaking strategy, Assess impact and learn |
| SYSTEM QUESTION(S) | Learning |
| RESOURCE TYPE | Theories and Frameworks |

³ Daniel Kim, “Guidelines for Drawing Causal Loop Diagrams,” *The Systems Thinker* (1992). Available at <http://www.cs.toronto.edu/~sme/SystemsThinking/GuidelinesforDrawingCausalLoopDiagrams.pdf>.

⁴ Faster than 20 available at <http://fasterthan20.com/collaboration-muscles-and-mindsets/>.

COLLECTIVE IMPACT

A highly structured process that brings together stakeholders from across sectors who agree on a common set of goals to influence a social issue and a shared set of success measurements. It requires a backbone organization to guide the process and relies on stakeholders' willingness to change their own behavior, communicate and coordinate. It is well suited for communitywide change efforts. For more information, read "Collective Impact," by John Kania and Mark Kramer.⁵

| | |
|-----------------------------|---|
| PARTICIPATION | Highly participatory |
| EXPERTISE | Someone who has been trained on the resource |
| SHORTEST TIME | More than a year |
| GRANTMAKING STAGE(S) | Develop grantmaking strategy, Identify and select grantees, Shape and monitor grants, Assess impact and learn |
| SYSTEM QUESTION(S) | People, Variables, Patterns and Structure, Learning |
| RESOURCE TYPE | Process |

COMMUNITY ASSESSMENTS

A variety of processes for understanding a community's needs and assets. Often, they are highly participatory and action-oriented processes, and many use visual mapping techniques to analyze and communicate multidimensional issues. They uncover strengths and opportunities, gaps to fill, disparities relative to other communities to address, and potential causes and solutions of community issues. They are well suited for community change efforts, particularly in a community organizing or community development context. For more information and a useful suite of resources, see the University of Kansas' "Community Tool Box."⁶

| | |
|-----------------------------|------------------------------|
| PARTICIPATION | Highly participatory |
| EXPERTISE | A skilled facilitator |
| SHORTEST TIME | One to five months |
| GRANTMAKING STAGE(S) | Develop grantmaking strategy |
| SYSTEM QUESTION(S) | People, Variables |
| RESOURCE TYPE | Process |

CONCEPT MAPPING

A visual mapping technique that uses a six-step process to depict how different types of stakeholders cluster ideas into larger concepts. This process is useful for identifying and aligning varying beliefs about how to change a system, understanding how different groups of stakeholders contribute to a systems change initiative, and creating a collective plan for systems change. It is helpful in the context of a specific issue or field. For more information, see the profile on page 31.

| | |
|-----------------------------|--|
| PARTICIPATION | Highly participatory |
| EXPERTISE | An expert with specialized knowledge or technology |
| SHORTEST TIME | Less than one month |
| GRANTMAKING STAGE(S) | Develop grantmaking strategy |
| SYSTEM QUESTION(S) | Variables |
| RESOURCE TYPE | Visual Mapping |

⁵ John Kania and Mark Kramer, "Collective Impact," *Stanford Social Innovation Review* (Winter 2011). Available at http://ssir.org/images/articles/2011_WI_Feature_Kania.pdf.

⁶ Community Tool Box available at <http://ctb.ku.edu/en>.

CONTAINERS, DIFFERENCES AND EXCHANGES MODEL

A framework to assess and create the conditions for people to self-organize in ways that disrupt and change system patterns. CDE is part of a larger process for managing change in complex adaptive systems and can be applied to organizations, issues and fields. It is also useful for developing the participants' capacity to be systems thinkers and building social capital among participants in ways that are clearly linked to systems change. For more information and other resources, see the profile on page 33.

| | |
|-----------------------------|--|
| PARTICIPATION | Highly participatory |
| EXPERTISE | A skilled facilitator |
| SHORTEST TIME | Six to 12 months |
| GRANTMAKING STAGE(S) | Develop grantmaking strategy, Identify and select grantees, Shape and monitor grants |
| SYSTEM QUESTION(S) | People, Learning |
| RESOURCE TYPE | Theories and Frameworks |

CRITICAL SYSTEMS HEURISTICS

A framework that explicitly identifies a system's boundaries through an inquiry into the four sources of system influence and 12 key boundary decisions made in reference to them. By surfacing boundary decisions about who and what is included/excluded in the system, it is particularly useful for ensuring that stakeholders draw boundaries in ways that do not contribute to power imbalances and inequities. It also enables users to understand and incorporate multiple perspectives into systems change. It is not intended to be used as a worksheet to fill out but rather for learning and meaning-making during systems change. For more information, see the work of developer Werner Ulrich.⁷

| | |
|-----------------------------|---|
| PARTICIPATION | Flexible from no/some participation to highly participatory |
| EXPERTISE | Someone who has been trained on the resource |
| SHORTEST TIME | Less than one month |
| GRANTMAKING STAGE(S) | Develop grantmaking strategy |
| SYSTEM QUESTION(S) | Variables, Learning |
| RESOURCE TYPE | Theories and Frameworks |

DEVELOPMENTAL EVALUATION

An evaluative process that is being used to understand and influence systems dynamics. It integrates planning, design, monitoring and evaluation. While it does not have a specific methodology or set of steps, developmental evaluators bring a set of practices to the project and are part of the design team. They help to frame questions, support iterative testing and rapid decision-making, and track what has and hasn't happened and why. Developmental Evaluation is well suited for the early stages of innovation — where there is a need for real-time learning, uncertainty and multiple stakeholders. For more information, see the work of Michael Quinn Patton,⁸ as well as The J.W. McConnell Family Foundation's developmental evaluation primer⁹ and practitioner's guide.¹⁰

| | |
|-----------------------------|---|
| PARTICIPATION | Highly participatory |
| EXPERTISE | Someone who has been trained on the resource |
| SHORTEST TIME | One to five months |
| GRANTMAKING STAGE(S) | Shape and monitor grants, Assess impact and learn |
| SYSTEM QUESTION(S) | Learning |
| RESOURCE TYPE | Process |

⁷ Werner Ulrich's Home Page. Available at <http://wulrich.com/>.

⁸ For a list of Michael Quinn Patton's published work, visit <http://www.utilization-focusedevaluation.org/books/>.

⁹ Jamie A. A. Gamble, "A Developmental Evaluation Primer", The J.W. McConnell Family Foundation (2008). Available at <http://www.mcconnellfoundation.ca/assets/Media%20Library/Publications/A%20Developmental%20Evaluation%20Primer%20-%20EN.pdf>.

¹⁰ Elizabeth Dozois et al., "A Practitioner's Guide to Developmental Evaluation," The J.W. McConnell Family Foundation (2010). Available at <http://mcconnellfoundation.ca/assets/Media%20Library/Publications/DE%20201%20EN.pdf>.

FOUR-STAGE SYSTEMIC CHANGE PROCESS

A four-step process for grantmakers and stakeholders from across the system to embed systems-thinking principles and tools in a change management framework. It mobilizes stakeholders by integrating thinking systemically with convening systemically. This includes tools such as stakeholder mapping, the iceberg, causal loop mapping, systems archetypes, the bathtub analogy, mental modeling, surfacing the hidden benefits of business as usual, shared visioning, identifying leverage points and designing a systemic theory of change. It is well suited for addressing a specific problem or issue area and for community-level change. For more information, see the profile on page 35.

| | |
|-----------------------------|---|
| PARTICIPATION | Highly participatory |
| EXPERTISE | Someone who has been trained on the resource |
| SHORTEST TIME | Six to 12 months |
| GRANTMAKING STAGE(S) | Develop grantmaking strategy, Identify and select grantees, Shape and monitor grants, Assess impact and learn |
| SYSTEM QUESTION(S) | People, Variables, Patterns and Structure, Learning |
| RESOURCE TYPE | Process |

LANDSCAPE SCANS

A narrative reporting resource for understanding a system at one point in time. It can include a review of issues; actors; events; historic strategies; market supply and demand; and social, political and economic context. Depending on the approach taken, Landscape Scans can surface gaps in the system, narrow issues of importance, clarify key stakeholders and influencers, identify drivers in a system, provide a market analysis, explore funding opportunities, etc. This may be done using qualitative and/or quantitative research and usually focuses on a specific issue, field or geography. For more information, see GrantCraft's guide to landscape scans.¹¹

| | |
|-----------------------------|---|
| PARTICIPATION | Flexible from no/some participation to highly participatory |
| EXPERTISE | A skilled facilitator |
| SHORTEST TIME | One to five months |
| GRANTMAKING STAGE(S) | Develop grantmaking strategy, Identify and select grantees |
| SYSTEM QUESTION(S) | People, Variables |
| RESOURCE TYPE | Narrative Reporting |

POWER ANALYSIS

A visual mapping technique that shows stakeholders on two intersecting continuums: 1) from opposing to supporting a systems solution, and 2) from having no power to significant power to make decisions about the systems solution. It is used to identify ways to change the power dynamics in a system that will lead to systems change. It is helpful for movement-level change and for community organizing, policy or advocacy campaigns. For more information, see the profile on page 37.

| | |
|-----------------------------|--|
| PARTICIPATION | Highly participatory |
| EXPERTISE | A skilled facilitator |
| SHORTEST TIME | Less than one month |
| GRANTMAKING STAGE(S) | Develop grantmaking strategy, Identify and select grantees |
| SYSTEM QUESTION(S) | People |
| RESOURCE TYPE | Visual Mapping |

¹¹ Anne MacKinnon and Lisa Philp, "Scanning the Landscape 2.0: Finding Out What's Going on in Your Field," GrantCraft (2012). Available at <http://www.grantcraft.org/guides/scanning-the-landscape-2.0>.

RAPID REALIST REVIEW

A narrative reporting resource to understand quickly which interventions are likely to change a system, under what circumstances, through which mechanisms (e.g., structures, processes, activities) and with whom. Rapid Realist Review goes one step further than Landscape Scans to analyze patterns of relationships among contexts, mechanisms and outcomes. It includes a focused literature review using a template for data extraction followed by a data validation process with knowledge users and stakeholders. It is particularly useful for specific issues or in the policy-making context. For more information, see the profile on page 39.

| | |
|-----------------------------|--|
| PARTICIPATION | Not participatory |
| EXPERTISE | Someone who has been trained on the resource |
| SHORTEST TIME | One to five months |
| GRANTMAKING STAGE(S) | Develop grantmaking strategy, Identify and select grantees |
| SYSTEM QUESTION(S) | People, Variables, Patterns and Structure |
| RESOURCE TYPE | Narrative Reporting |

SENSEMAKER

A narrative reporting resource that uses proprietary software for large-scale data collection.¹² It identifies patterns of behavior based on individuals' stories as they relate to a particular issue or event. These stories are self-analyzed, which reveals patterns that are difficult to surface in collective meaning-making endeavors. The self-analyzing also enables people to understand their own environment, removes researcher bias, and leverages peer-to-peer knowledge flow and innovation. When the data are collectively analyzed in the SenseMaker software, it creates visual maps with overlays that show how individuals and networks interact with multiple system variables to change systems and generate new patterns. It is helpful when focused on a defined set of stakeholders in a community or field. For an example of how this tool has been used, see Girl Hub's work in Rwanda.¹³ You can find a more in-depth profile on <http://systems.geofunders.org>.

| | |
|-----------------------------|---|
| PARTICIPATION | Highly participatory |
| EXPERTISE | An expert with specialized knowledge or technology |
| SHORTEST TIME | One to five months |
| GRANTMAKING STAGE(S) | Develop grantmaking strategy, Shape and monitor grants, Assess impact and learn |
| SYSTEM QUESTION(S) | Variables, Patterns and Structure |
| RESOURCE TYPE | Narrative Reporting |

SOCIAL MOVEMENT CAPACITIES FRAMEWORK

A capacity-building framework that identifies 10 elements of successful movements. Three examples of elements are: 1) having a common vision and frame, 2) having an authentic base of key constituencies, and 3) having a strategy to scale up. This framework may be used to map movement actors who contribute to each element; identify areas for greater collaboration, coordination, or differentiation; and reveal gaps in the movement that need to be addressed. For more information, see "Making Change: How Social Movements Work and How to Support Them," by Manuel Pastor and Rhonda Ortiz,¹⁴ and Management Assistance Group's "A Tool for Mapping Successful Movements."¹⁵

| | |
|-----------------------------|--|
| PARTICIPATION | Highly participatory |
| EXPERTISE | A skilled facilitator |
| SHORTEST TIME | Less than one month |
| GRANTMAKING STAGE(S) | Develop grantmaking strategy, Identify and select grantees |
| SYSTEM QUESTION(S) | Variables, Learning |
| RESOURCE TYPE | Theories and Frameworks |

¹² <http://www.cognitive-edge.com>.

¹³ Cognitive Edge, "Using SenseMaker to Understand Girls' Lives" (2015). Available at <http://old.cognitive-edge.com/wp-content/uploads/2015/04/GH-SenseMaker-brief.pdf>.

¹⁴ Manuel Pastor and Rhonda Ortiz, "Making Change: How Social Movements Work and How to Support Them," Program for Environmental and Regional Equity, University of Southern California (2009). Accessed at http://dornsife.usc.edu/assets/sites/242/docs/making_change_executive_summary.pdf.

¹⁵ Mark Leach, "A Tool for Mapping Successful Movements," Management Assistance Group (2015). Accessed at <http://www.managementassistance.org/blog/movement-mapping>.

SOCIAL NETWORK ANALYSIS

A visual mapping technique used to show a system's social structure. It identifies key actors, roles and relationships and how information, action and behaviors flow across the network. It is most useful when you are trying to influence and build social capital at the community, field or movement level. For more information, see the profile on page 41.

| | |
|-----------------------------|--|
| PARTICIPATION | Flexible from no/some participation to highly participatory |
| EXPERTISE | Someone who has been trained on the resource and/or An expert with specialized knowledge or technology |
| SHORTEST TIME | Less than one month |
| GRANTMAKING STAGE(S) | Identify and select grantees, Assess impact and learn |
| SYSTEM QUESTION(S) | People |
| RESOURCE TYPE | Visual Mapping |

STOCK AND FLOW DIAGRAMS

A visual mapping technique that shows how stock (e.g., amount of fish) increases or decreases over time as a result of specific flows (e.g., rate of regeneration of fish). While easily confused with Causal Loop Mapping and Cognitive Mapping, Stock and Flow Diagrams are different in that they are more precise about how much variables relate to each other over time. These diagrams are helpful in the context of a specific issue or field (e.g., fishery conservation). They can be used independently, as part of a Systems Mapping process (page 45) or for System Dynamics Modeling (see below). For more information on Stock and Flow Diagrams, please see *Thinking in Systems: A Primer* by Donella Meadows.¹⁶

| | |
|-----------------------------|--|
| PARTICIPATION | Flexible from no/some participation to highly participatory |
| EXPERTISE | Someone who has been trained on the resource and/or An expert with specialized knowledge or technology |
| SHORTEST TIME | Less than one month |
| GRANTMAKING STAGE(S) | Develop grantmaking strategy |
| SYSTEM QUESTION(S) | Variables, Patterns and Structure |
| RESOURCE TYPE | Visual Mapping |

SYSTEM DYNAMICS MODELING

A narrative reporting resource that requires advanced technology. First, one creates a detailed systems map (see Systems Mapping); a causal loop map without a stock and flow diagram would not be adequate. An expert may then turn the systems map into a mathematical model and create computer simulations of the system. The simulation can be used to identify those variables that most influence the entire system as well as subsystems. The simulation can also test possible system interventions. System Dynamics Modeling is helpful for influencing a system at a macro, global or multinational level. For more information, see the System Dynamics Society¹⁷ and the New England Complex Systems Institute.¹⁸ Forio is one potential option for online modeling.¹⁹

| | |
|-----------------------------|---|
| PARTICIPATION | Not participatory |
| EXPERTISE | An expert with specialized knowledge or technology |
| SHORTEST TIME | One to five months |
| GRANTMAKING STAGE(S) | Develop grantmaking strategy, Assess impact and learn |
| SYSTEM QUESTION(S) | Variables, Patterns and Structure |
| RESOURCE TYPE | Narrative Reporting |

¹⁶ Donella H. Meadows, *Thinking in Systems: A Primer* (Chelsea Green Publishing, 2008).

¹⁷ <http://www.systemdynamics.org>.

¹⁸ <http://necsi.edu>.

¹⁹ <http://forio.com>.

SYSTEMIC ACTION RESEARCH

A participatory process to understand and change the relationships and interactions among system variables and their resulting patterns of behaviors. It combines design, planning, action and evaluation into an action-learning cycle that is repeated every few months to enable real-time learning. It is helpful for fields, issues and movements when there is a need to engage multiple stakeholders. For more information and resources, see the profile on page 43.

| | |
|-----------------------------|---|
| PARTICIPATION | Highly participatory |
| EXPERTISE | A skilled facilitator |
| SHORTEST TIME | Six to 12 months |
| GRANTMAKING STAGE(S) | Develop grantmaking strategy, Identify and select grantees, Shape and monitor grants, Assess impact and learn |
| SYSTEM QUESTION(S) | People, Variables, Learning |
| RESOURCE TYPE | Process |

SYSTEMS MAPPING

A visual mapping resource that looks at how variables interact over time and form patterns of behaviors across the system. This is not the common vernacular of systems mapping, which refers to any way to understand and depict a system. Rather, Systems Mapping rigorously combines Causal Loop Mapping with Stock and Flow Diagrams (see pages 21 and 26). Systems Mapping helps grantmakers identify the most influential variables. Thus, there is the potential for elegant solutions to influence patterns over time that can be replicated and scaled for different geographies. It is also often used as a tool for stakeholder engagement by “bringing the system into the room.” For more information, see the profile on page 45.

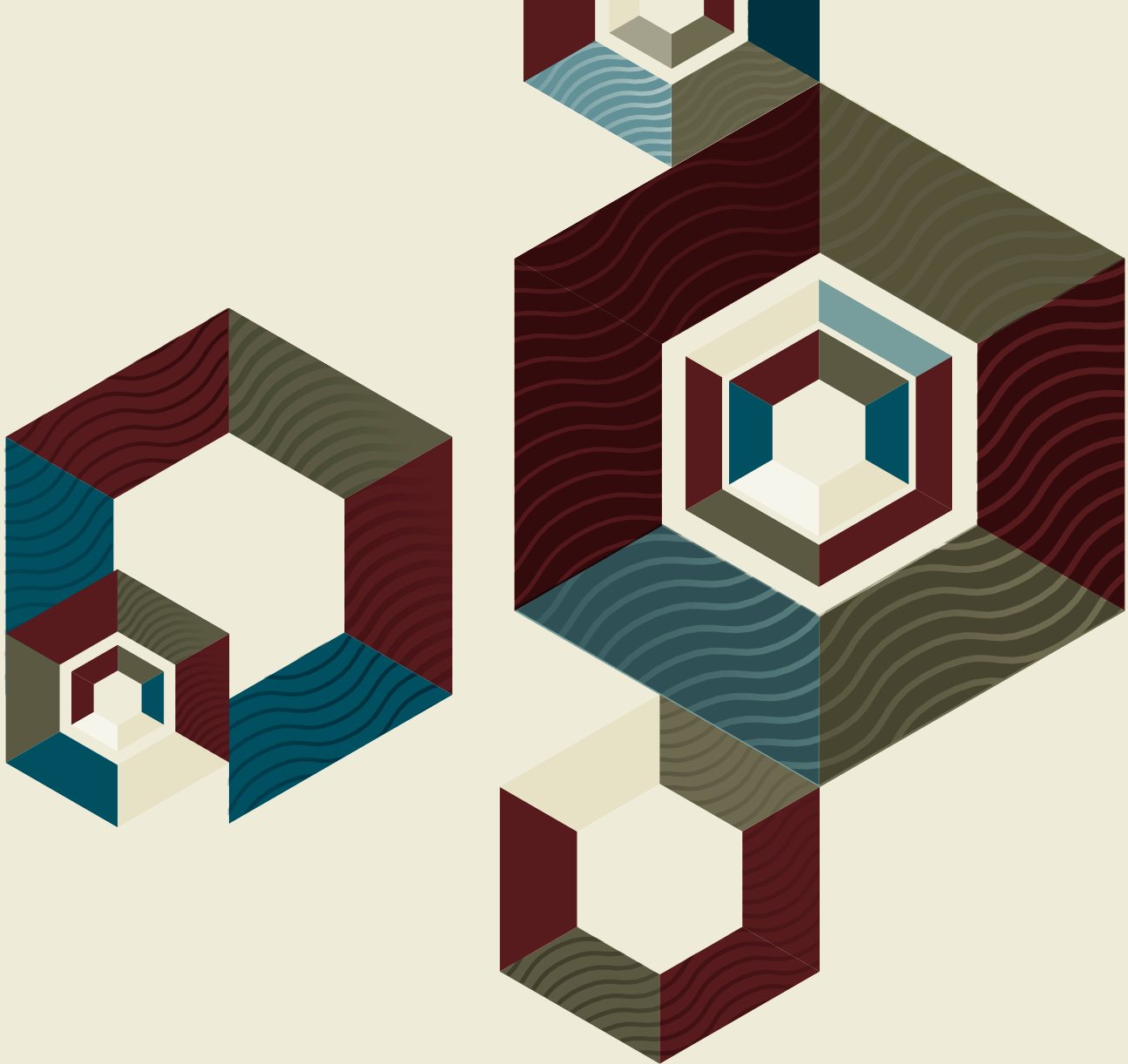
| | |
|-----------------------------|---|
| PARTICIPATION | Flexible from no/some participation to highly participatory |
| EXPERTISE | An expert with specialized knowledge or technology |
| SHORTEST TIME | One to five months |
| GRANTMAKING STAGE(S) | Develop grantmaking strategy, Identify and select grantees |
| SYSTEM QUESTION(S) | Variables, Patterns and Structure |
| RESOURCE TYPE | Visual Mapping |

THEORY U

A five-step process to shift consciousness and awareness among system stakeholders. It includes observing the reality of a system, reflecting on what learning emerges, and prototyping a future reality using fast feedback loops. It incorporates shifting the inner state of change agents and allows a group of stakeholders to let go of the past; open their hearts, minds and will; and forge new patterns of behavior in the system. Theory U is well suited for community change and issue-based efforts that involve multiple stakeholders. For more information, see Otto Scharmer’s Presencing Institute.²⁰

| | |
|-----------------------------|---|
| PARTICIPATION | Highly participatory |
| EXPERTISE | Someone who has been trained on the resource |
| SHORTEST TIME | More than one year |
| GRANTMAKING STAGE(S) | Develop grantmaking strategy, Identify and select grantees, Shape and monitor grants, Assess impact and learn |
| SYSTEM QUESTION(S) | Variables, Patterns and Structure, Learning |
| RESOURCE TYPE | Process |

²⁰ <https://www.presencing.com>.



APPLYING RESOURCES IN THE FIELD: SELECTED PROFILES

In this section, you will find detailed descriptions of a selected group of resources. We chose them to represent the range of systems grantmaking resources reviewed in the previous section. Each profile includes a brief overview of the resource and its purpose, when it is useful for systems grantmaking, an example of how it works, and some considerations for grantmakers and other social-sector actors using the resource.

ABLE CHANGE FRAMEWORK

WHAT'S ITS PURPOSE IN SYSTEMS GRANTMAKING?

To guide a participatory systems learning and change process.

WHAT IS IT?

A six-step process for guiding stakeholders through systems change. The process includes the following:

1. Define a targeted problem.
2. Engage diverse perspectives.
3. Scan system conditions influencing the targeted problem.
4. Engage stakeholders in making sense of the system data.
5. Develop a shared agenda and local infrastructure.
6. Facilitate an action-learning process, which is an iterative cycle that combines design, planning, action and evaluation.

WHEN IS IT USEFUL?

- When a group of grantees and other social-sector actors must collectively understand the system to influence it
- In systems bounded by community-level issues or by geography

HOW DOES IT WORK? AN EXAMPLE

Over the course of a three-year grant, the ABLe Change Framework's creators at Michigan State University used the process to develop an integrated service delivery system for youth with severe emotional disorders in Saginaw County, Michigan. As a result of this initiative's work, access to care increased, there was greater trust among organizations and coordination of services improved. Additionally, the community received a competitive federal grant to continue building the integrated service delivery system.

The Michigan State team members began by engaging diverse stakeholders, such as service delivery providers and affected youth, in conversations to make meaning of the problem and their

QUICK FACTS



Participation:
Highly participatory



Expertise:
Someone who has been trained on the resource



Shortest Time:
Six to 12 months



Grantmaking Stage(s):
Develop grantmaking strategy, Identify and select grantees, Shape and monitor grants, Assess impact and learn



System Question(s):
People, Variables, Learning



Resource Type: Process



community. They conducted a systems scan that revealed root causes, system patterns, and what would be needed for effective implementation related to system capacity, readiness and diffusion.

The stakeholders collaboratively developed a theory of change that identified system attributes that were sustaining and reinforcing the problem as well as leverage points for shifting the system. They identified two examples of systems-level changes: more coordinated services and inclusion of youth and family voices in service delivery decisions. Partner agencies then created action plans toward achieving these changes. They tracked the action items in these plans over time and surveyed people in order to measure the benefits of the change process as well as identify areas for improvement.

To support implementation, they also

- created four systemic action-learning teams to understand the problem, take action, assess the actions and reanalyze the current situation;
- identified system behaviors that were barriers to change and created four simple rules to shift those patterns of behavior during implementation; and
- promoted small wins as a precursor to transformative change and to maintain momentum around the change effort.

The ABLe Change website offers a range of resources to support the process for people trained on the ABLe Framework. Examples include a visioning workshop, a guide to engaging diverse perspectives, system scan guides and worksheets, a community assessment process through photography, a root cause analysis worksheet, questions for uncovering leverage points, an action plan template and a guide to systemic action learning.

TIPS AND CAUTIONS FOR GRANTMAKERS AND THE SOCIAL SECTOR

- Participants need clear expectations and support to participate.
- The facilitator needs to be able to acknowledge and navigate power dynamics within the system, particularly if the grantmaker is present during the conversations.
- ABLe works best with multiyear initiatives. However, the creators of the framework have found ways to incorporate aspects of ABLe into shorter initiatives of a few months. For example, the early childhood system building efforts in several states nationwide are using the system-scanning process to guide the system change design and strategic planning efforts in local communities.

RESOURCES

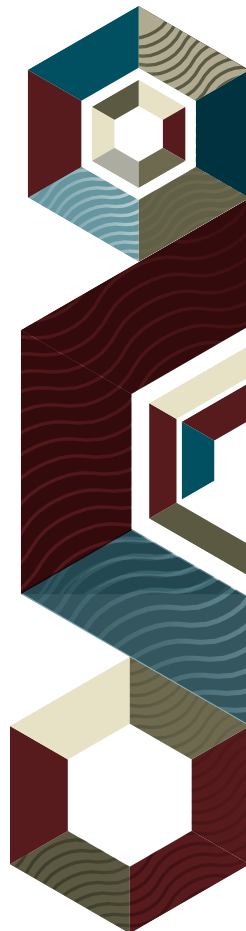
ABLe Change Framework

Available at <http://ablechange.msu.edu/>

“The ABLe Change Framework: A Conceptual and Methodological Tool for Promoting Systems Change”

By Pennie G. Foster-Fishman and Erin R. Watson, *American Journal of Community Psychology*, 2012

Available at <http://www.buildinitiative.org/Portals/0/Uploads/Documents/ABLe%20Framework.pdf>



CONCEPT MAPPING

WHAT'S ITS PURPOSE IN SYSTEMS GRANTMAKING?

To align varying beliefs about how to influence a system, understand how different groups of stakeholders contribute and create a collective plan for systems change.

WHAT IS IT?

A visual mapping technique that uses a six-step process to depict how different types of stakeholders cluster ideas into larger concepts. The six steps include the following:

1. **Preparation:** Identify the project focus and relevant stakeholder groups.
2. **Generation:** Collect qualitative data about stakeholder perceptions (e.g., what they think are solutions to a problem).
3. **Structuring:** Sort the answers from the second step into clusters of similar ideas. Participants also rate each idea (e.g., based on its importance and feasibility for influencing the system).
4. **Representation:** Use multidimensional scaling and hierarchical cluster analysis to map the clusters by stakeholder group and rating.
5. **Interpretation:** Make meaning of the maps and work through areas of alignment and disagreement.
6. **Utilization:** Create plans to change the system.

Some advanced technology is needed.

WHEN IS IT USEFUL?

- In settings where multiple types of stakeholders need to work together to influence the system
- In systems bounded by a particular issue area or field of work

QUICK FACTS



Participation:
Highly Participatory



Expertise:
An expert with specialized knowledge or technology



Shortest Time:
Less than one month



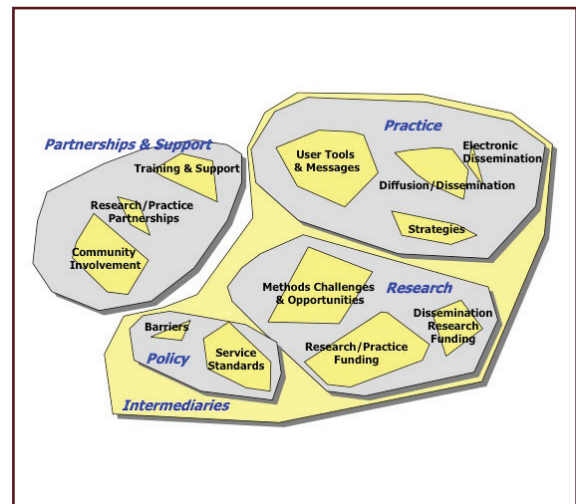
Grantmaking Stage(s):
Develop grantmaking strategy



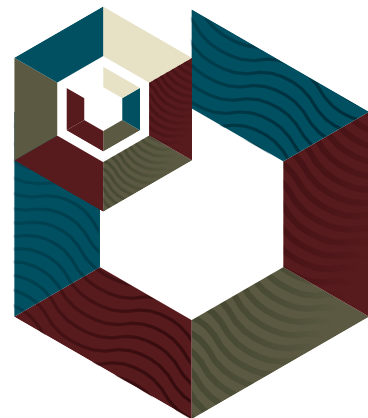
System Question(s):
Variables



Resource Type:
Visual Mapping



Resulting concept map from The Initiative on the Study and Implementation of Systems work on tobacco control.



HOW DOES IT WORK? AN EXAMPLE

The Initiative on the Study and Implementation of Systems, funded by the National Cancer Institute, used Concept Mapping in addition to a variety of other tools and processes to bring systems thinking to tobacco control. The initiative used the concept maps to create a logic model and action plans focused on systems-level interventions to help stakeholders integrate research and practice efforts.

The initiative asked a set of conference participants to name “one thing that should be done to accelerate the adoption of cancer control research discoveries by health service delivery programs.” The planning committee took more than 200 submissions and sorted them into 98 distinct ideas, 12 concept clusters and four larger chunks of activities, pictured on the opposite page.

The participants then rated the 98 ideas based on feasibility and importance in addressing the research/practice gap. Additional analysis determined that researchers and practitioners had differing ideas about the role of each group in addressing the problem. Surfacing this lack of alignment was key for informing action plans because it allowed people to understand and value different perspectives and to develop a shared vision to address the problem.

TIPS AND CAUTIONS FOR GRANTMAKERS AND THE SOCIAL SECTOR

- It is critical to engage diverse systems stakeholders in order to identify different conceptions and roles and to forge common agreements about actions and responsibilities moving forward. For more participatory processes, managing power dynamics is key.
- The generation and structuring phases may involve dozens to thousands of people and can be implemented in person or virtually.
- The representation phase requires special expertise and technology to be successful.
- It is helpful for the interpretation phase to be implemented in person to strengthen relationships among systems stakeholders and the system’s capacity for self-organizing. A facilitator can help stakeholders understand the somewhat abstract maps and identify implications for systems change priorities and their roles.
- This method has been used in conjunction with Rapid Realist Review, Social Network Analysis, and Developmental Evaluation (see pages 39, 41, 23).

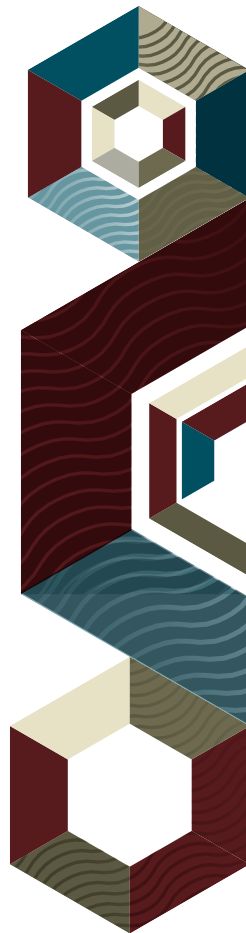
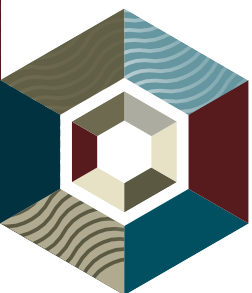
RESOURCES

“Concept Mapping”

By William M. Trochim, Research Methods Knowledge Base website
Available at <http://www.socialresearchmethods.net>

“Greater Than the Sum: Systems Thinking in Tobacco Control”

By the National Cancer Institute, *Tobacco Control Monograph*, 2007
Available at <http://cancercontrol.cancer.gov/Brp/tcrb/monographs/18/index.html>



CONTAINERS, DIFFERENCES AND EXCHANGES MODEL

WHAT'S ITS PURPOSE IN SYSTEMS GRANTMAKING?

To create the conditions for people to self-organize in ways that disrupt and change system patterns.

WHAT IS IT?

A framework for understanding how people interact with and influence systems. There are three parts:

1. **Containers** are the boundaries of the system, which can be physical, organizational, behavioral or conceptual.
2. **Significant Differences** are those differences among stakeholders (e.g., power, race, gender, values) that most influence patterns in the system.
3. **Transforming Exchanges** are interactions among stakeholders that transform the stakeholders and their relationships.

It is one of the frameworks in a larger process, called Adaptive Action, for managing change in complex adaptive systems.

WHEN IS IT USEFUL?

- When developing the participants' capacity to be systems thinkers
- When you are trying to build social capital among diverse participants
- When fragmentation, silos or power dynamics impair progress on an issue
- In systems bounded by a particular issue area or field of work

HOW DOES IT WORK? AN EXAMPLE²¹

A grantmaker working with grantees to improve the conditions of home health care workers used CDE to lay the groundwork for systems change. This resulted in the launch of a workforce development and employer training program as well as the "Fair Care Pledge" to shift standards in employment practices. The effort began with a landscape scan to understand how stakeholders across the home health care system conceptualized the system. Through a number of interviews with experts, home health care workers and their employers, the grantmaker and grantees identified the following:

1. **Containers:** They discovered that the workers defined their field in terms of service work and elderly care employers and advocates defined their field in terms of aging.
2. **Significant Differences:** Home health care workers wanted sustainable, dignified work that allowed them to support their

QUICK FACTS



Participation:
Highly participatory



Expertise:
A skilled facilitator



Shortest Time:
Six to 12 months



Grantmaking Stage(s):
Develop grantmaking strategy;
Identify and select grantees;
Shape and monitor grants



System Question(s):
People and Learning



Resource Type:
Theories and Frameworks

²¹ This is a hypothetical example, largely drawn from the Caring Across Generations work and, specifically, the December 2014 report, "The Eldercare Dialogues: A Grassroots Strategy to Transform Long-Term Care." Available at https://cdp.urbanjustice.org/sites/default/files/CDP.WEB.doc_Report_Eldercare-Dialogues_20141211.pdf.

families. Their employers wanted affordable care in their own homes. Additionally, the elderly and their advocates had more power and resources than the workers.

3. **Transforming Exchanges:** The home care workers, their employers and their employers' advocates had few interactions. At the same time, the grantmaker saw opportunities to change the elder care system in this country, which is strained due to the vast increase in elderly people in need of care and fewer caregivers to care for them, especially within the home, as well as the lack of funding to support these services.

Based on this research, the grantmaker considered how it could shift the system boundaries (i.e., the containers), help stakeholders reconcile and transcend differences, or create opportunities for interactions that could lead to new ways for people to self-organize. It chose the third as the place to experiment and as a starting point to shift all three conditions.

The grantmaker supported a series of convenings (i.e., transforming exchanges) between its traditional grassroots grantees and the elder care employers. A cross-section of leaders met to develop a shared understanding of how their perceptions of the system differed and how they could redefine their goals to be mutually beneficial and grounded in accountability and trust. They reached a joint commitment to bring dignity to home health care jobs, spur job creation in the field, and ensure that families and individuals have the quality care they need to live independently and with dignity. This mutual commitment allowed the participants to self-organize into an ongoing group that has fought for a living wage for home health care workers, immigration reform — which impacts many of the workers — and expanded funding for home health care assistance for the elderly.

TIPS AND CAUTIONS FOR GRANTMAKERS AND THE SOCIAL SECTOR

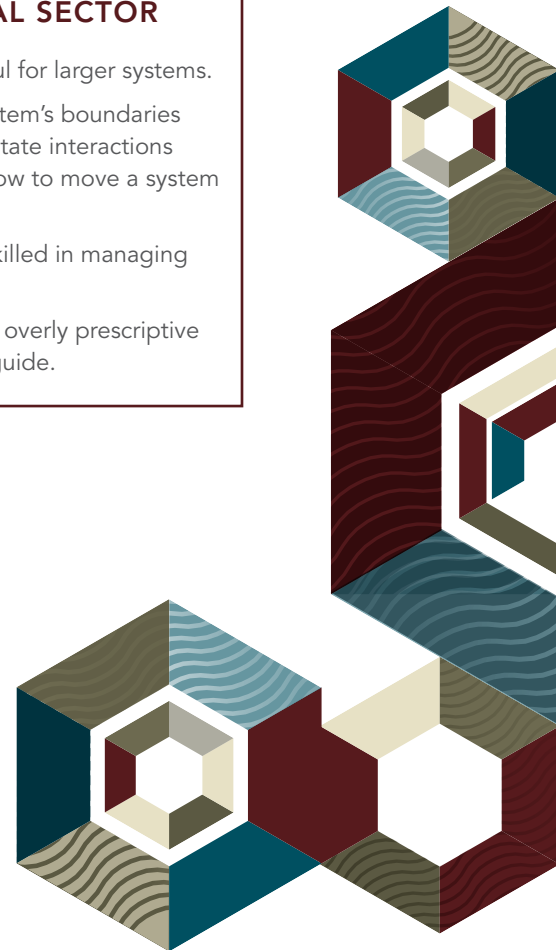
- This model was created for use inside complex organizations, but it is also useful for larger systems.
- The model's authors offer many tools and processes to expand or shrink the system's boundaries (i.e., containers) and identify the most significant differences to bridge and facilitate interactions (i.e., exchanges) among diverse stakeholders. There are also concrete tips on how to move a system (e.g., use difference to disrupt the status quo).
- To facilitate transforming exchanges among diverse stakeholders, a facilitator skilled in managing power dynamics is often needed.
- The model provides a framework for thinking about grantmaking without being overly prescriptive in terms of defining a process. It can be integrated into other resources in this guide.

RESOURCES

Facilitating Organization Change: Lessons from Complexity Science

By Edwin Olson and Glenda Eoyang

Jossey Bass/Pfeiffer, 2001



FOUR-STAGE SYSTEMIC CHANGE PROCESS

WHAT'S ITS PURPOSE IN SYSTEMS GRANTMAKING?

To align diverse stakeholders around a shared understanding of why a complex social problem persists and identify leverage points that might improve systemwide performance in sustainable ways.

WHAT IS IT?

A four-stage process to collectively engage stakeholders across a system in systemic change by harnessing the energy and sense of urgency that generates from *creative tension*,²² which is the gap between current reality and vision for the future. These four stages are iterative and nonlinear:

1. building a foundation for change,
2. facing current reality,
3. making an explicit choice about the future, and
4. bridging the gap between the current reality and the future.

WHEN IS IT USEFUL?

- When stakeholders have trouble seeing how they contribute to the problem and what they can do to optimize the whole system instead of just their part of it
- To identify leverage points and integrate them into a systemic theory of change
- When systems are bound by a social change issue that can be addressed at a local, state or regional level

HOW DOES IT WORK? AN EXAMPLE

A group of local funders, including the Battle Creek Community Foundation, Community Foundation Alliance of Calhoun County, W.K. Kellogg Foundation and United Way, supported a coalition in Calhoun County, Michigan to come up with a 10-year plan for ending homelessness. The coalition used the Four-Stage Systemic Change Process, which resulted in decreased homelessness rates even during the economic downturn.²³

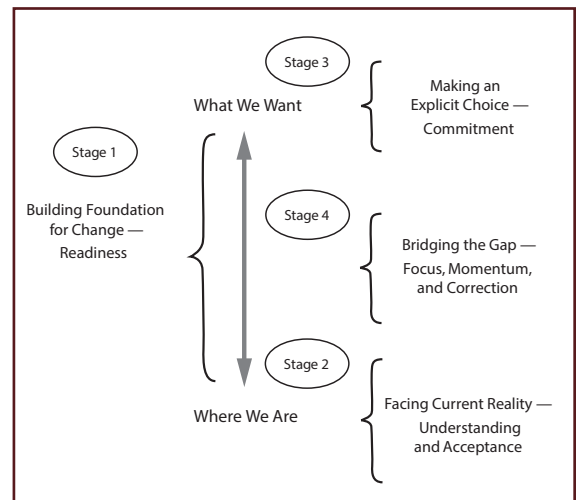
In the first stage of the process, the goals are to engage key stakeholders, create a shared initial picture of people's vision and where they are now, and build capacity to collaborate. The coalition engaged stakeholders, including service providers, business people, government officials and the homeless. The coalition introduced this diverse group of stakeholders to

²² Drawn from: Peter Senge, *The Fifth Discipline: The Art & Practice of The Learning Organization* (Doubleday, 2006).

²³ The coalition engaged consultants David Peter Stroh and Michael Goodman to facilitate the Four-Stage Systemic Change Process.

QUICK FACTS

- 👤
Participation:
Highly participatory
- 🗄️
Expertise:
Someone who has been trained on the resource
- 🕒
Shortest Time:
Six to 12 months
- 🔗
Grantmaking Stage(s):
Develop grantmaking strategy;
Identify and select grantees;
Shape and monitor grants;
Assess impact and learn
- 🏠
System Question(s):
People, Variables, Patterns,
Structure, and Learning
- 🏷️
Resource Type:
Process



Systems Thinking for Social Change: A Practical Guide for Solving Complex Problems, Avoiding Unintended Consequences, and Achieving Lasting Results
By David Peter Stroh
Chelsea Green, 2015

systems thinking and productive conversation techniques, and the group created a vision for the future that centered on ending homelessness.

The goal of the second stage is to develop a deep understanding of the current reality. The consultants conducted interviews with stakeholders to understand the issues around why people became homeless and why they were not able to attain stable housing. They then created a systems map to identify interdependencies among the variables influencing and affected by the problem (see Systems Mapping on page 45). A small committee expanded this map and brought it to the larger steering committee for deeper analysis, continued mapping and catalytic conversations (which challenge stakeholders to recognize and change their role in the status quo). During this stage, they surfaced “shifting the burden” as the primary system archetype at play. System archetypes distill key insights about how the system operates (see inset). They also added mental models — the beliefs and assumptions driving actions — to the map.

In the third stage, people commit to moving toward their envisioned future by understanding and comparing the payoffs of the status quo with the payoffs for change and creating solutions that maximize the benefits of both states or make conscious trade-offs in support of what they care about most deeply. In Calhoun County, they explored how current efforts to solve the problem of homelessness often exacerbated it by creating negative unintended consequences. They also made decisions to shift resources from programs that helped people cope with homelessness (temporary housing) to programs that would end homelessness (permanent affordable housing).

In the final stage, stakeholders work to bridge the gap between their current reality and their commitment to the future. This includes identifying leverage points (such as those proposed by Donella Meadows) to shift a system archetype, integrating these into a systemic theory of change, and developing new mental models. It also includes creating a process for ongoing learning and engagement to recalibrate plans based on what the group is learning.

12 SYSTEM ARCHETYPES

Each archetype has specific leverage points that work to shift the system. The archetypes include:

- virtuous/vicious cycles,
- balancing process,
- fixes that backfire,
- shifting the burden,
- limits to growth,
- success to the successful,
- accidental adversaries,
- drifting goals,
- competing goals,
- escalation,
- tragedy of the commons, and
- growth/underinvestment.

TIPS AND CAUTIONS FOR GRANTMAKERS AND THE SOCIAL SECTOR

- The four-stage process is flexible. There is space to incorporate other tools and frameworks.
- It is critical to engage diverse stakeholders early on in order to create accurate maps. The stakeholders should be varied enough to generate divergent thinking.
- During the second stage, a facilitator skilled in managing power dynamics, who is comfortable with conflict resolution, may be needed for successful catalytic conversations.
- The process includes powerful questions that foundations may ask of staff, board, grantees, and others to transform how they think about their goals and strategies. These questions can be used to help people think and act systemically. They can be found in the article “Leveraging Grantmaking – Part 2: Aligning Programmatic Approaches with Complex System Dynamics.”

RESOURCES

Systems Thinking for Social Change: A Practical Guide for Solving Complex Problems, Avoiding Unintended Consequences, and Achieving Lasting Results

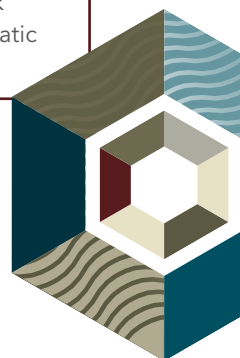
By David Peter Stroh, Chelsea Green, 2015

“Leveraging Grantmaking: Understanding the Dynamics of Complex Social Systems”

By David Peter Stroh, *The Foundation Review*, 2009

“Leveraging Grantmaking – Part 2: Aligning Programmatic Approaches with Complex System Dynamics”

By David Peter Stroh and Kathleen Zurcher, *The Foundation Review*, 2010



POWER ANALYSIS

WHAT'S ITS PURPOSE IN SYSTEMS GRANTMAKING?

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.

WHAT IS IT?

A visual mapping technique that creates a common understanding of the current power relations related to a particular problem by placing stakeholders on two intersecting continuums: 1) from opposing to supporting a systems solution and 2) from having no power to significant power to make decisions about the systems solution. There are eight steps:

1. Define the major **problems** or conditions negatively impacting your primary constituency.
2. Define **your agenda and the major competing agenda** against the conditions you would like to change.
3. Plot the major **policy battles or campaigns** related to the problem and conditions.
4. Identify the major **centers of decision-making** that control the problem or conditions.
5. Plot the major **organized and active opposition**.
6. Plot the **organized ally groups**.
7. Plot the key **unorganized groups or constituencies**.
8. Analyze the picture and **develop strategies** for creating change.

WHEN IS IT USEFUL?

- When power dynamics are a major driver of a problem and focusing resources on a specific set of constituencies will help shift those dynamics
- When determining goals and strategies for movement-level change or community organizing, policy or advocacy campaigns
- When there is a well-defined issue, problem or desired outcome

QUICK FACTS

- 👤
Participation:
Highly participatory
- 🗄️
Expertise:
A skilled facilitator
- 🕒
Shortest Time:
Less than one month
- 🔗
Grantmaking Stage(s):
Develop grantmaking strategy;
Identify and select grantees;
- 👥
System Question(s):
People
- 🏷️
Resource Type:
Visual Mapping



This is a simplified version of a Power Analysis map. For the full version of this map, please see the presentation cited for this example or go to <http://systems.geofunders.org>.

HOW DOES IT WORK? AN EXAMPLE²⁴

A grantmaker worked with Strategic Concepts in Organizing and Policy Education 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-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.

First, the group had a meeting to identify problems related to poor nutrition and diet including increased rates of diabetes in children and the provision of high-fat, high-salt school meals. Second, the group sketched out its agenda related to the importance of healthy meals and health equity to education outcomes. It then sketched the opposition's agenda, which included maximizing vendor revenue and cuts to education funding. Third, it identified the major policy battles influencing the problem, such as school board elections.

In the fourth through seventh steps, the stakeholders developed a shared understanding of power by mapping out the following: 1) major decision-makers (i.e., the school board), 2) major opposition (i.e., meal vendors), 3) allies (i.e., the local PTA), and 4) unorganized groups (i.e., low-income families with school-aged children). They plotted these groups on the map in relation to where they stand on the issue and the level of influence each stakeholder has in the system. Refer to the example map for details.

Finally, in the eighth step, strategies for changing the problem were developed by discussing: the strengths and challenges of the current position of their organizations and allies; which allies are essential partners; which unorganized constituencies should be developed as allies; and, given the discussion, where they need to put the most energy.

This mapping technique is a critical complement for other resources like Social Network Analysis and Causal Loop Mapping (see pages 41, 21), which provide more information about the relationships among stakeholders and/or what variables need to be influenced.

TIPS AND CAUTIONS FOR GRANTMAKERS AND THE SOCIAL SECTOR

- To create a richer map, it may be useful to include diverse stakeholders who are considered insiders and outsiders of the system or who know about policymaking and policy implementation.
- The technique requires a high level of trust among participants. A facilitator skilled in managing power dynamics and conflict among participants is important. The technique needs sufficient space and time for discussion, particularly when identifying the primary decision-maker and opposition groups.
- The technique simplifies stakeholders' positions by assuming competing agendas. It's important to be cautious about drawing conclusions that are too stark and clear-cut.
- As is true with all of the resources in this guide, grantmakers facilitating Power Analysis need to account for and address concerns about their own power. It can be useful to put both funders and grantees on the map and have conversations about power with both the grantmaker and grantees in the room.

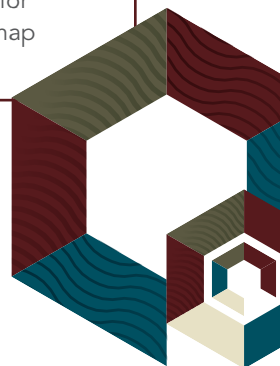
RESOURCES

“Introduction to Power Analysis”

By Gloria Medina, 501(c)onference presentation, 2015

Available at <http://cnmsocal.org/wp-content/uploads/2014/06/IntrotoPowerAnalysis.pdf>

²⁴ This is a hypothetical example based on the “Intro to Power Analysis” Presentation by SCOPE at the 2015 Center for Nonprofit Management conference. SCOPE has developed best practices and tools, which it shares nationally, based on more than 20 years of community organizing in South Los Angeles around economic development. For more information, please see <http://scopela.org>.



RAPID REALIST REVIEW

WHAT'S ITS PURPOSE IN SYSTEMS GRANTMAKING?

To identify which interventions are most likely to influence the system in a specific context, what mechanisms need to be put in place first and a few simple rules to guide systems change.

WHAT IS IT?

A narrative reporting resource used in 10 rapid steps to quickly understand what interventions are likely to change a system, under what circumstances, through which mechanisms (i.e., structures, processes, activities, etc.) and with whom. The 10 steps, of which steps three through seven are iterative, include the following:

1. Recruit reference and expert panels and develop the project scope.
2. Develop the specific research questions.
3. Identify how the findings and recommendations will be used.
4. Develop search terms.
5. Identify articles and documents for inclusion in the review.
6. Conduct quality scoping literature review.
7. Extract data from the literature and appraise and synthesize the evidence.
8. Validate findings with content experts.
9. Synthesize the findings into a final report.
10. Disseminate the results.

WHEN IS IT USEFUL?

- When there is a specific systems intervention or question
- In rapidly changing, emergent environments where a large amount of information needs to be processed and decisions made quickly
- It has been used most in health care and for policymaking but could be applied to other issues

HOW DOES IT WORK? AN EXAMPLE

As part of an effort to transform the Saskatchewan provincial health system, the provincial Ministry of Health, funded by the Canadian Institutes of Health Research, worked with a research team²⁵ to conduct a Rapid Realist Review about the role of government in conducting large-scale systems change in health care. The RRR identified five simple rules to guide Saskatchewan in its health system transformation efforts. These efforts, which included a number of initiatives, resulted in several improved outcomes such as decreased wait times for elective surgery and improved primary care.

²⁵ A list of all of the team members can be found here: Allan Best et al., “Knowledge and Action for System Transformation (KAST): A Systematic Realist Review and Evidence Synthesis of the Role of Government Policy in Coordinating Large System Transformation,” Centre for Clinical Epidemiology and Evaluation, Vancouver Coastal Health Research Institute, (2010).

QUICK FACTS



Participation:
Not participatory



Expertise:
Someone who has been trained on the resource



Shortest Time:
One to five months



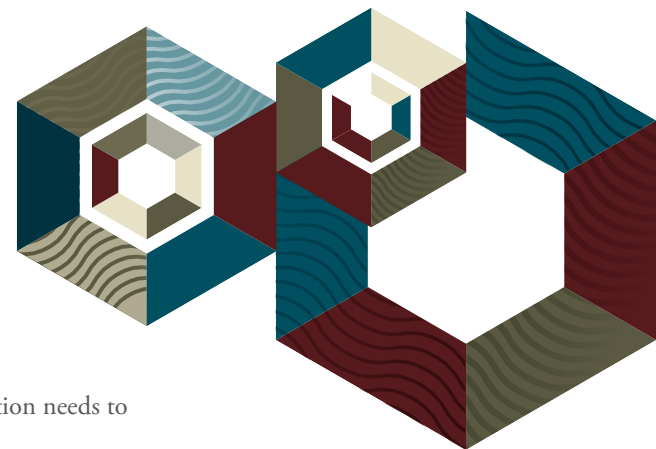
Grantmaking Stage(s):
Develop grantmaking strategy;
Identify and select grantees



System Question(s):
People, Variables, Patterns and Structure



Resource Type:
Narrative Reporting Resource



The ministry went through RRR's 10-step process, as described below, in six months.

STEP 1: Ministry staff members began by recruiting a reference (knowledge users) panel and an expert panel. They then worked with the knowledge users (i.e., those who implement or are impacted by the policy) and content experts to create a scope for the project. They defined the scope as understanding models and strategies, principles of partnership, and evaluation for large-scale systems change as well as identifying recommendations for the government's role related to four specific initiatives (e.g., surgical wait lists).

STEP 2: They cocreated four major research questions focused on the social processes that drive systems change, the contexts that impact this change, the transition points in change and the role of government.

STEP 3: They identified how the findings would inform the design of health care reform.

STEPS 4 TO 5: They selected relevant search terms for the review and used them to identify articles and literature. They also asked experts and knowledge users for resources. They revised the search terms and identified additional literature. The team ultimately gathered more than 410 potential resources.

STEP 6: They selected a sampling of 84 documents to review.

STEP 7: They reviewed the documents using a template for data extraction to identify interventions, contexts, mechanisms and outcomes.

STEP 8: They surveyed 44 field experts to validate the findings and fill gaps in the literature.

STEPS 9 TO 10: They synthesized and disseminated the findings in a report, which included actual recommendations for government involvement in the system change.

TIPS AND CAUTIONS FOR GRANTMAKERS AND THE SOCIAL SECTOR

- This is an alternative to traditional policy research and analysis or landscape scans. It explores what works for whom under what circumstances.
- Since the information gathered is historical and current, newly emerging and untested future ideas are not captured. Thus, RRR recommendations may need to be complemented with other methods to generate innovations.
- Some fields may not contain enough published or grey literature to adequately draw conclusions about relationships among context, mechanisms and outcomes.
- While not participatory, RRR incorporates contributions from content experts and knowledge users. Those contributions are key to ensuring that RRR captures emerging ideas not yet in the literature and validates the findings. If it isn't possible for grantmakers to survey these individuals, the data may be limited and biased.

RESOURCES

“A Time-Responsive Tool for Informing Policy Making: Rapid Realist Review”

By Jessie E. Saul, Cameron D. Willis, Jennifer Bitz and Allan Best, *Implementation Science*, 2013

Available at <http://www.implementationscience.com/content/8/1/103>

“Knowledge and Action for System Transformation (KAST): A Systematic Realist Review and Evidence Synthesis of the Role of Government Policy in Coordinating Large System Transformation”

By Allan Best et. al.

Centre for Clinical Epidemiology and Evaluation, Vancouver Coastal Health Research Institute, 2010

“Large-System Transformation in Health Care: A Realist Review”

By Allan Best, Trisha Greenhalgh, Steven Lewis, Jessie E. Saul, Simon Carrol and Jennifer Bitz, *The Milbank Quarterly*, 2012

Available at <http://www.ncbi.nlm.nih.gov/pmc/articles/PMC3479379/>

SOCIAL NETWORK ANALYSIS

WHAT'S ITS PURPOSE IN SYSTEMS GRANTMAKING?

To influence a system's social structure by identifying key actors; roles; relationships; and how information, action, and behaviors flow across the network.

WHAT IS IT?

A visual mapping technique to show how people connect and relate to each other.

WHEN IS IT USEFUL?

- When you are trying to build social capital in a community, field or movement
- When fragmentation, silos or power dynamics hinder progress on an issue

HOW DOES IT WORK? AN EXAMPLE

The James Irvine Foundation created the New Leadership Network to build trust; increase information sharing; and foster collaboration among business, nonprofit, education, government, health, faith and media leaders in Fresno, California.²⁶ These leaders were not working together but were interested in building relationships across sectors. As a result of this initiative and social network analysis, 47 leaders have built strong relationships and participated in 84 collaborations on micro and macro levels.

The consultants began the social network analysis by surveying Fresno leaders in order to determine their network connections as well as the strength and nature of these connections. Those data were then analyzed with network mapping software through

QUICK FACTS



Participation: Flexible from no/ some participation to highly participatory



Expertise: Someone who has been trained on the resource and/ or an expert with specialized knowledge or technology



Shortest Time: Less than one month



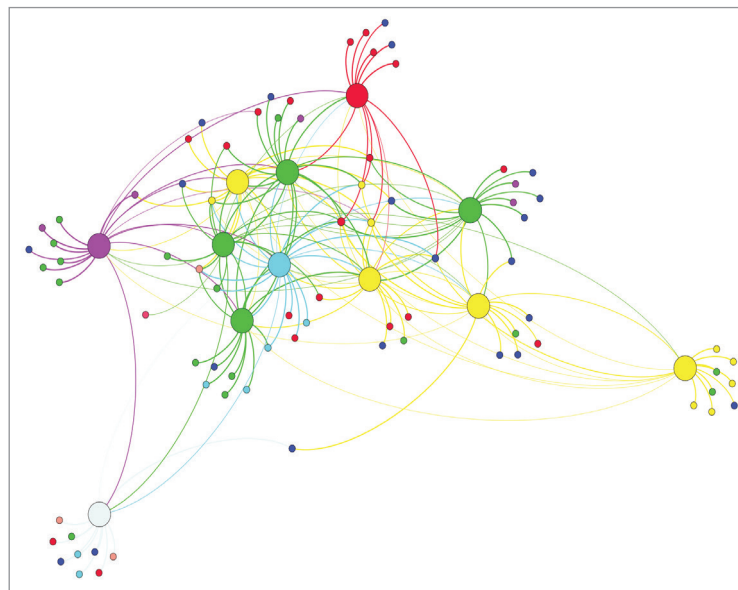
Grantmaking Stage(s): Identify and select grantees; Assess impact and learn



System Question(s): People



Resource Type: Visual Mapping



Social network map developed to understand connections among leaders in the Fresno, California community.

²⁶ The foundation worked with consultants Heather McLeod Grant, David Erlichman and David Sawyer to design the network and facilitate the use of social network analysis and other network-building sessions.

lenses such as race, gender and geography. Their initial baseline image, depicting second-degree connections by sector, is shown here. Through this analysis, they were able to see a few strong clusters where people are tightly connected and identify areas to target with respect to relationship building.

The initiative coupled social network analysis with facilitated network-building sessions and with leadership training on systems, networks, and design thinking. For instance, the foundation supported meetings to identify challenges in Fresno and surface leverage points and solutions.

TIPS AND CAUTIONS FOR GRANTMAKERS AND THE SOCIAL SECTOR

- Social Network Analysis has been adapted to understand different types of information (e.g., Values Mapping) and different types of actors (e.g., Social Movement Mapping).
- It's possible to do basic mapping of social networks without software, which may be a useful exercise when forming collaborations or networks within the social sector.
- Incorporating diverse perspectives triangulates information and ensures accuracy of the social network analysis.
- Social Network Analysis can be used to identify the diverse perspectives needed to engage in systems change work, even if there is no intention to build a network.
- Software is helpful for analyzing very large networks but can also detach the process from the people involved. Grantmakers need to balance technological approaches with participatory processes that build relationships.
- Social Network Analysis may be enhanced by other resources, like Power Analysis; SenseMaker; and the Containers, Differences and Exchanges Model, which help forge understanding with respect to how a network interacts with and affects systems.

RESOURCES

“Engage: How Funders Can Support and Leverage Networks for Social Impact”

By Monitor Institute and The Rockefeller Foundation

Available at <http://engage.rockefellerfoundation.org/>

Gephi is a visualization platform for mapping social networks and analyzing them at a mathematical level. It is useful in measuring network growth and evolution.



SYSTEMIC ACTION RESEARCH

WHAT'S ITS PURPOSE IN SYSTEMS GRANTMAKING?

To influence the system by understanding and changing the relationships and interactions among system variables and their resulting patterns of behaviors.

WHAT IS IT?

A participatory process that combines design, planning, action and evaluation into an action learning cycle that is repeated every few months to enable real-time learning. The iterative phases include the following:

1. Analyze the situation.
2. Generate new theories of change.
3. Plan action.
4. Take action.
5. Evaluate impact.

WHEN IS IT USEFUL?

- When working on issues, fields or movements that need to engage multiple stakeholders with different perspectives on what systems change is needed
- In formative assessment and learning processes

HOW DOES IT WORK? AN EXAMPLE

SAR contains many of the elements of traditional action research, which is a participatory process that incorporates design, planning, action and evaluation into iterative cycles.²⁷ However, SAR focuses on system change rather than individual, group or community-level change. It studies how and why change happens (not what change happens) as well as unintended consequences. SAR is guided by five principles:

1. It must focus on the system dynamics that need shifting through the process.
2. It is designed to engage large groups of people across the system in multiple parallel inquiry processes that are linked together.
3. As different aspects of the system are revealed, the boundaries of the system will continue to shift, bringing different stakeholders into the inquiry process.

²⁷ For more on action research, please see <http://actionresearchplus.com/handbook/>.

QUICK FACTS



Participation:
Highly participatory



Expertise:
A skilled facilitator



Shortest Time:
Six to 12 months



Grantmaking Stage(s):
Develop grantmaking strategy
Identify and select grantees;
Shape and monitor grants;
Assess impact and learn

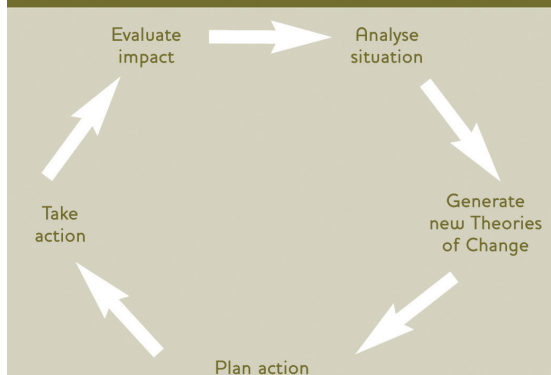


System Question(s):
People, Variables, and Learning



Resource Type:
Process

Building theories of change into the action research cycle



Source: Adapted from Kolb (1984).

"Assessing Impact in Dynamic and Complex Environments: Systemic Action Research and Participatory Systemic Inquiry." By Danny Burns
Centre for Development Impact, 2014

4. Facilitators need to be aware of their power and its impact on the learning framework (see more on this below).
5. Data are tested for legitimacy by determining if they resonate with stakeholders across the system.

In Nairobi's Kamakunji slum, the Netherlands International Development Organization used SAR to advance access to clean water and sanitation. The SAR process resulted in the creation of a youth group that successfully connected 120 homes to sewers in just three months and the identification of local champions who converted latrines into toilets.

At the beginning of the SAR cycle in Kamakunji, community members identified access to clean water as a pressing need. Rather than quickly moving to try to bring actors related to the water system to the table, the facilitators spoke to community residents. They discovered a key obstacle: landlords' resistance to connecting units to the water system. By opening up lines of inquiry with both landlords and tenants, stakeholders revealed that landlords did not want to connect to the water system because it meant that their units would be registered with the local council and they would then owe taxes. The organization did not know about or understand this link with taxes at the beginning of the cycle. An inquiry that kept tight system boundaries around the groups of stakeholders involved in the inquiry process would not have revealed it. As the facilitators moved through the SAR cycle, they kept the lines of inquiry with tenants and landlords parallel; power imbalances would make it challenging to bring these groups together. Both groups continued to move through action cycles and open up new possibilities to influence the system (in divergent and convergent ways), resulting in increased access to clean water. This example reveals how system boundaries are porous and, as issues are followed in a SAR inquiry, different actors join the cycle.

TIPS AND CAUTIONS FOR GRANTMAKERS AND THE SOCIAL SECTOR

- SAR does not assess impact in relationship to baseline measures of expected outcomes set forth at the outset of a project. Rather, it looks at decisions, actions and impacts that emerge during the process.
- The process may incorporate and utilize many of the other resources in this guide.
- The facilitators may be the only people in the process connected across the entire system. Thus, facilitators must be aware of their own power in creating the framework for learning and shaping the inquiry and connecting the data. Consequently, it is key to be intentional about who facilitates the process. Engaging local champions to help guide the process is one effective way of distributing leadership.

RESOURCES

Navigating Complexity in International Development: Facilitating Sustainable Change at Scale

By Danny Burns and S. Worsley
Practical Action Press, 2015

“Systemic Action Research: Changing System Dynamics to Support Sustainable Change.”

By Danny Burns, *Action Research*, 2014
Available at <http://arj.sagepub.com/content/12/1/3.full.pdf>

“Assessing Impact in Dynamic and Complex Environments: Systemic Action Research and Participatory Systemic Inquiry”

By Danny Burns, Centre for Development Impact, 2014
Available at <http://www.ids.ac.uk/publication/assessing-impact-in-dynamic-and-complex-environments-systemic-action-research-and-participatory-systemic-inquiry>



HOW DOES IT WORK? AN EXAMPLE

The Walton Family Foundation engaged systems stakeholders in a participatory process, facilitated by the Academy for Systemic Change, to map the fishery and ocean conservation systems. According to the academy, the resulting systems map “reveals one way of seeing the system of fishery and ocean conversation, the theory of change of various interventions, and how they interact with each other.” The map was used to form a collective impact strategy among the funders and grantees.²⁸

The foundation team members began the mapping process by developing a precise understanding of how multiple variables interact in the fishery and ocean conservation systems over time. This understanding is represented through a causal loop map superimposed onto a stock and flow diagram. The causal loop map is represented by the circular loops with arrows on the map. The arrows show the interconnected variables and the direction of influence among variables. The stock and flow diagram is represented by the rectangles and straight arrows on the map. The lines show how stock increases or decreases over time as a result of specific flows. System maps need both causal loops and stock and flow diagrams to show the precise linkages between the causal loops and how tangible things change over time.

In the example, the stock and flow diagram shows that regeneration rates increase the stock of juvenile fish and maturation rates decrease the juvenile stock and increase the adult fish stock (as juveniles move into the adult stock). The various loops show the variables that impact this process and the population size of juvenile and adult fish and thus offer areas for influencing the process. Related diagrams and accompanying documents can be found on the Academy for Systemic Change’s website.²⁹

TIPS AND CAUTIONS FOR GRANTMAKERS AND THE SOCIAL SECTOR

- Systems Mapping could help to prioritize where grantmakers need to focus. By identifying the most influential variables, there is potential for elegant solutions to influence patterns over time that can be replicated and scaled for different geographies.
- The maps can be a challenge to understand for those who are not visual thinkers. They can also seem abstract, and their meaning can be hard to convey to stakeholders. Bringing people into the analysis early helps to diminish these challenges.
- Systems Mapping is often used as a tool for stakeholder engagement by “bringing the system into the room.” It should be a living map that guides actions and is revised as the system changes over time.

RESOURCES

“Systemic Change Process Map”

By Joe Hsueh, Ph.D., Academy for Systemic Change

Available at http://www.academyforchange.org/wp-content/uploads/2013/09/Systemic-Change-Process-Map-08_2013.pdf

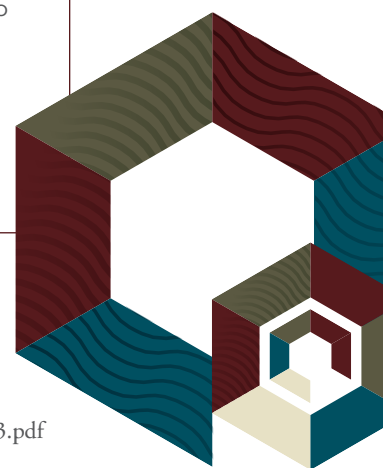
“Transformer: How to Build a Network to Change a System”

By Heather McLeod Grant, Monitor Institute, 2010

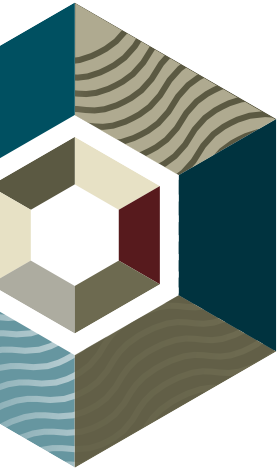
Available at <http://www.monitorinstitute.com/what-we-think/transformer/#transformer>

²⁸ Results of the collective impact strategy are not publicly available.

²⁹ This example is from the Academy for Systemic Change. Related diagrams and documents are available at <http://www.academyforchange.org/wp-content/uploads/2012/08/Fishery-Causal-Loop-Diagram-2011.9.pdf>.



GLOSSARY



ARCHETYPE

- A generalized structure that represents common reoccurring patterns of behavior in a system.
- There are several archetypes that have been identified.³⁰
- Each archetype can be translated into a simple narrative story about what is happening and why. This story also identifies potential unintended consequences to avoid.

COMPLEX / COMPLEXITY

- There are different meanings for *complex* depending on the discipline (e.g., biology, economics, social science). For grantmakers and social-sector actors, *complex* refers to situations that are both: Political — where there are differences of opinion and lack of agreement and Unpredictable — where it isn't possible to identify cause and effect in advance, variables are interconnected and interdependent, and there is not a linear progression from action to results.

EVENTS

- Events are the activities, actions and behaviors we experience.
- They represent a single point in time, yet events can occur simultaneously. They are tangible and observable with a marked start and finish. Some events are repetitive and others are not.
- Examples include an election, policy change, earthquake, oil spill, birthday or turning on a light switch.

FORCES

- A force is the push or pull by which one event or behavior can trigger another. Forces are people, habits, customs, attitudes, emotions, and any other factor that can either drive or resist change. The term “forces” was coined by Kurt Lewin and is different, but not mutually exclusive from, other systems terms such as “events” and “behaviors.”

MENTAL MODELS

- A mental model is the set of beliefs, values and assumptions that individuals have about a system. An example is “voting is a right for every adult citizen.”

PATTERNS OF SYSTEM BEHAVIOR

- By looking at many events over time, it is possible to see patterns form. These patterns are called “behaviors” of the system. In this guide, the redundant term “patterns of behaviors/events” is used to distinguish this systems concept from the generic concept of patterns.
- They are observable and can be seen at different levels of the system. They help us to understand how events relate to other events.
- Examples include voting trends, rates of change over time and repeated failure to implement policies.

³⁰ While many people have written about and developed archetypes, one source for examples is: Peter Senge, *The Fifth Discipline: The Art & Practice of The Learning Organization* (Doubleday, 2006).

STRUCTURE

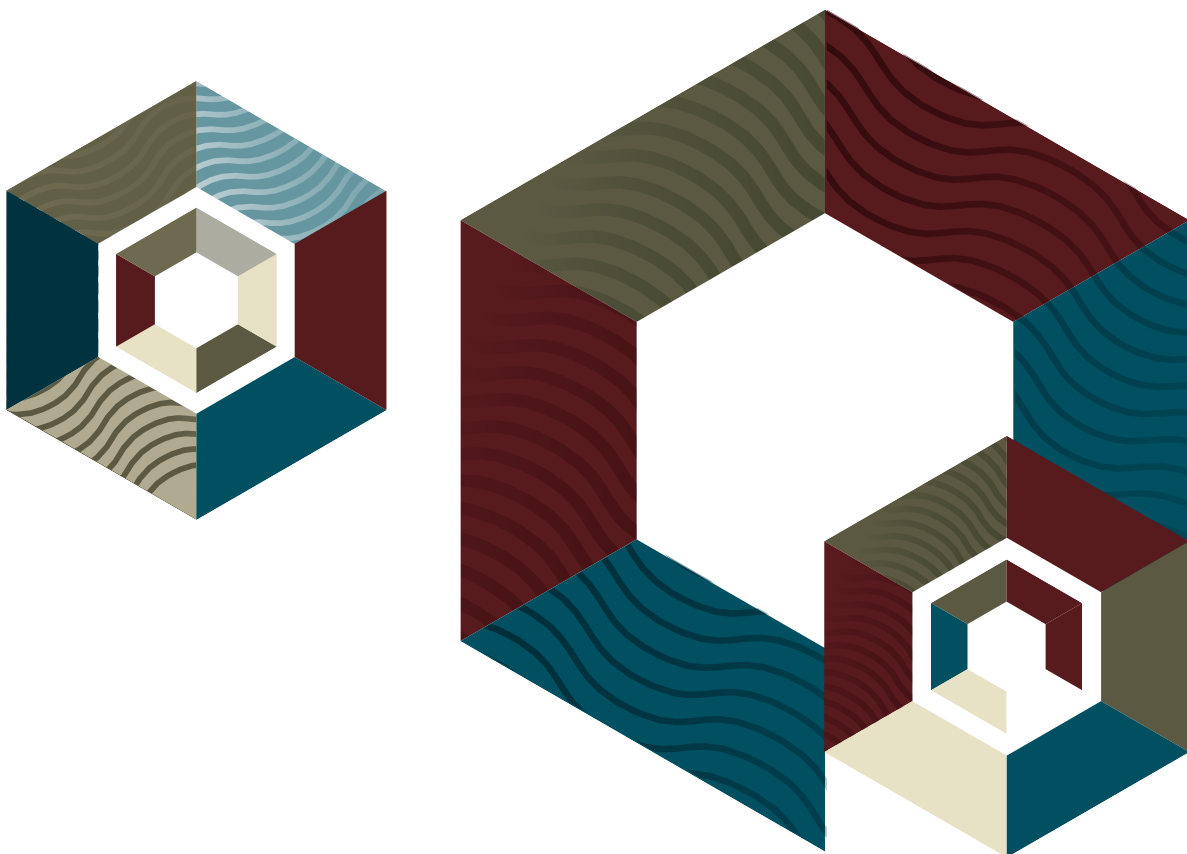
- The structure of a system is the relationship between patterns of behavior. A system's structure drives the patterns of behavior and events and, simultaneously, is created by them over time.
- Structure includes the interrelationships among parts of a system as well as the processes by which the parts interact over time. Structure may or may not be observable.
- Examples include the flow of resources to the wealthiest and voter disenfranchisement.

SYSTEM

- A system is a set of parts (e.g., issues, people, organizations, policies, norms) that are interconnected, porously bounded and continually changing over time.

VARIABLES

- This includes events, forces and mental models. It also includes people, organizations, policies, norms, values and all other parts of a system.



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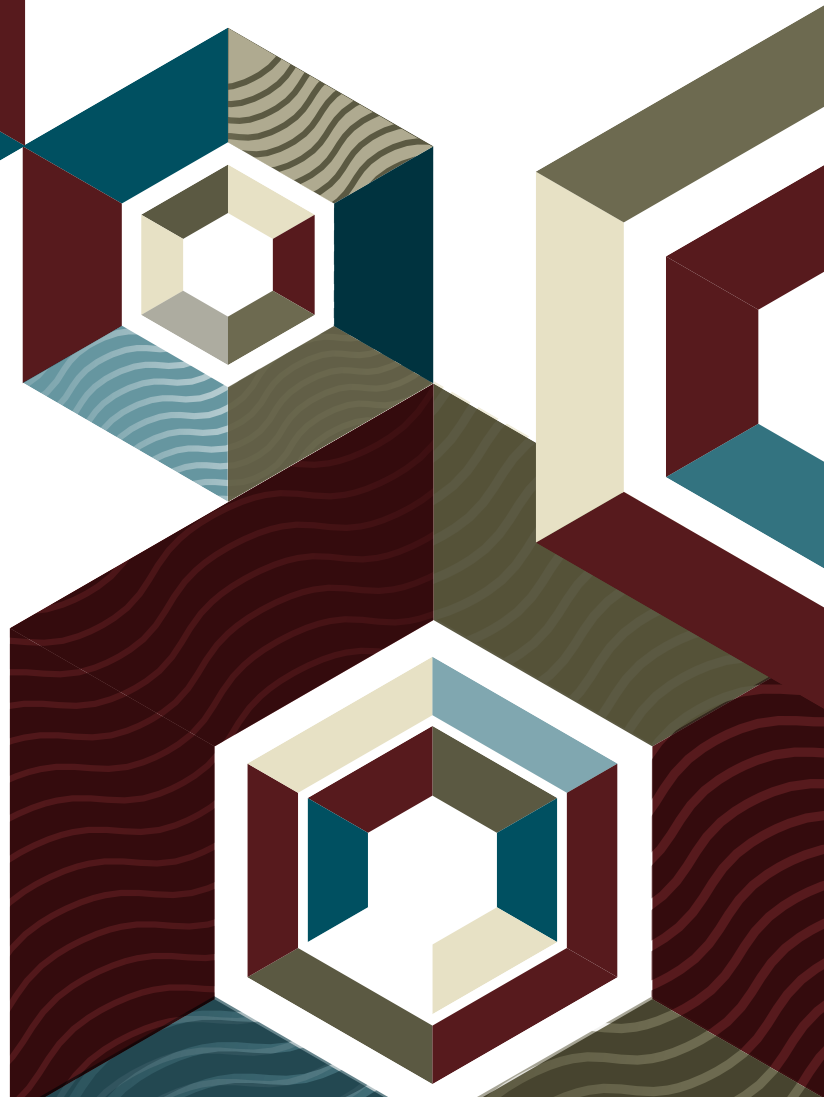
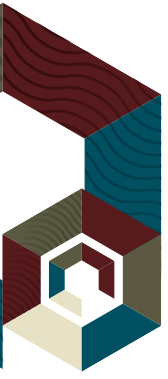
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