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Creating Habits for Inclusive Change

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Introduction

The act of transforming communities requires the mobilization of diverse stakeholders as agents of change: adopting, implementing, and diffusing policy and practice changes in support of collective goals and creating the conditions for transformation within their own spaces and places. This movement to action lies at the heart of effective community change efforts, but it remains one of the most challenging aspects of collective work.

Despite stakeholders' desire for change and despite efforts toward inclusive planning and governance, the actions needed to transform outcomes within communities often do not emerge (Miller & Burns, 2006). Many communities report the lack of action as a significant barrier to change, and funders, initiative leaders, and backbone staff often struggle to determine the best processes to trigger momentum for change and build collective accountability for action. This inaction can have significant negative consequences for collaborative groups, causing some stakeholders to withdraw support and even terminate their involvement (Demant & Lawrence, 2018).

This article presents four processes we have introduced in numerous communities across the United States to create an inclusive culture for action through our work using the ABLe Change Framework.¹ This framework aims to create the community conditions and systems needed to reduce inequities and improve population-level outcomes. Central to the ABLe Change approach is a continuous-transformation model of change (Burnes, 2004): the belief that communities and organizations must have the ability to continuously adapt and improve in order to thrive and

Key Points

- The act of transforming community outcomes requires diverse stakeholders across an array of settings to become actors of change. While this movement to action lies at the heart of effective community change, it also remains one of the most challenging aspects of collective work.
- Drawing from the ABLe Change Framework systems-change model, this article presents four processes used in numerous communities across the United States to effectively engage diverse stakeholders in taking actions to improve local systems. These processes prioritize the voices of the most disadvantaged within communities and engage them as key actors in the change process.
- This article introduces the ABLe Change Framework tools, which are used to promote these action-oriented habits, and then discusses how foundations can use them to create the conditions that promote inclusive community change.

survive. Such an approach is particularly appropriate when tackling complex social problems (Anderson, 1999); the dynamic, unpredictable nature of these problems requires attention to system reactions to change (Olson & Eoyang, 2001) and considerations of system incongruences with change efforts (Coburn, 2003). Effective change pursuits are best able to respond to this complexity when they involve diverse stakeholders, settings, and sectors as active learners and agents of change. Overall, when action becomes the basis for learning and is coupled with opportunities for reflection on the actions taken,

¹ See <http://ablechange.msu.edu>.

Change efforts are more likely to succeed when they penetrate vertical and horizontal layers within a community and become integrated into the habits of daily living.

significant personal and systems development can emerge (Checkland & Scholes, 1990).

For these reasons, the ABLe Change Framework engages diverse actors in action-learning processes that are supportive of community change plans and responsive to emergent understandings of community systems (Burns, 2007). In general, these actions work to build the conditions needed for successful community system-change pursuits:

- local system conditions aligned with change goals, including supportive policies and practices, power dynamics, network exchanges, and resource access (Coffman, 2007; Foster-Fishman & Watson, 2017);
- a climate for effective, equitable implementation, including capacity and readiness for change, effective diffusion of change efforts, and institutional alignment to support action (Fixsen, Naoom, Blasé, Friedman, & Wallace, 2005); and
- a culture for adaptive learning and continuous improvement, including access to relevant data, feedback loops, and stakeholders learning from and taking action on findings (Burns, 2007; Eoyang & Holladay, 2013).

The Need for Action

Change efforts are more likely to succeed when they penetrate vertical and horizontal layers within a community (Coburn, 2003; Foster-Fishman, Nowell, & Yang, 2007) and become

integrated into the habits of daily living. For example, when education reforms influence policy and practices within diverse sectors (e.g., early childhood, employment) and saturate multiple layers and spaces within an education system, a “normative coherence” (Coburn, 2003, p. 7) emerges, creating the culture for sustained transformative change (Coburn & Meyer, 1998). Such coherence is more likely to occur when stakeholders representing these different contextual layers and spaces are actively engaged in reform efforts.

Unfortunately, many change initiatives struggle to create this level of engagement. Even when local stakeholders are committed to change goals and when initiatives build the core elements included in many collaboration and collective-impact frameworks (Butterfoss & Kegler, 2009; Kania & Kramer, 2011; Wolff, 2010), the history and context of many communities can create conditions ripe for inaction (Demant & Lawrence, 2018). Take, for example, one state-wide early childhood systems-building effort that aimed to engage diverse cross-sector stakeholders in taking the actions needed to create a more effective early childhood system. Evaluation data revealed that despite the relatively high levels of collaborative capacity (Foster-Fishman, Berkowitz, Lounsbury, Jacobson, & Allen, 2001) present within these 54 coalitions, only 16 percent of the 1,107 members reported that their organization took actions to shift internal policies and procedures in support of collaborative goals (Foster-Fishman, Wattenberg, You, Collins, & McAlindon, 2012). Importantly, the level of action pursued was strongly predictive of success: More action was linked to improvements in service coordination, access to services, and responsiveness to local needs. In fact, some scholars have noted that collaborative efforts need to trigger a tipping point for community change in order to achieve transformative outcomes (Fawcett, Lewis, Paine-Andrews, Francisco, Williams, & Copple, 1997). Actions taken by diverse stakeholders are a necessary precursor to this tipping point.

Challenges to Generating Action for Inclusive Change

In 2010, we started to engage communities tackling a range of social problems in systems-change efforts via our ABLe Change Framework. While communities were eager to embrace a systems-change lens, we were surprised to discover how difficult it was to build change momentum and promote action. Even communities with strong collaborative infrastructures and effective backbone staff struggled to engage diverse stakeholders as actors of change. In our conversations with and surveys of local stakeholders across multiple communities, five common challenges to action consistently appeared:

1. lack of readiness for and resistance to change, including beliefs that change is not desirable, feasible, or necessary (Armenakis, Harris, & Mossholder, 1993). These beliefs often generated significant resistance to change and eroded commitment to action (Edwards, Jumper-Thurman, Plested, Oetting, & Swanson, 2000). These beliefs emerged from stories of the failure of prior initiatives (Lasker, Weiss, & Miller 2001), concerns about the time-consuming nature of community change efforts (Hoey & Sponseller, 2018), and an unwillingness to challenge the status quo, including shifting existing power dynamics (Ryan, 2008; Wolff, Minkler et al., 2017);
2. lack of clarity around the goals or aims of the change effort and the resultant ambiguity around what actions to take to support it (Holt, Armenakis, Feild, & Harris, 2007);
3. lack of engagement from critical stakeholders, most notably the individuals most affected by the targeted problem (Wolff, Minkler et al., 2017), though other critical stakeholders (e.g. business, direct-service delivery providers) were also often excluded. This practice was often supported by the belief that only the “power elite” could enact change (Aragon & Giles Macedo, 2010);
4. norms and practices that value information over action. This emerged as “analysis paralysis,” where stakeholders overemphasized the need to further understand data before moving forward (Burch, 2010), also showing up in the format and structure of many collaborative efforts that prioritized information sharing over problem-solving and action; and
5. lack of mutual accountability for action coupled with the fear of failure, including the belief that the “collective” or paid backbone staff would implement change.

Toward the goal of creating an environment that promotes “inclusive action,” we have worked to develop social technologies — change processes, ways of working together, and new tools — that can address these barriers (Ryan, 2008) and create new norms or habits where all stakeholders become active agents of change. Communities can use these processes and tools even if they are not working within the ABLe Change Framework. While it is our experience that more action will happen if all of these tools are used because they work synergistically together, the tools can be adopted individually. (See Table 1.)

Critical Process No. 1: Organize Stakeholders Around a Shared Vision

The adoption and pursuit of a shared vision for change is a key ingredient for moving communities to action (Kania & Kramer, 2011), as it provides the direction for change, inspires individuals, and focuses the energies of all collaborative members (Martin, McCormack, Fitzimons, & Spirig, 2014). Importantly, effective community change efforts not only generate commitment to the shared vision across involved stakeholders, but they also work to broaden public will and buy-in, integrating the shared vision across actors and settings throughout the system (ORS Impact & Spark Policy Institute, 2018). When the vision truly becomes embedded within a community, diverse stakeholders start to pursue aligned actions, creating ripple effects that trigger larger systems changes (Trickett & Beehler, 2017). Overall, developing a shared,

TABLE 1 Sample Tools and Processes to Promote Inclusive Action

Critical Process No. 1: Organize Diverse Stakeholders Around a Generative, Shared Vision for Change			
Process Activity	Tool	Description	Value for Promoting Action
Develop generative vision.	Shared Visioning Agenda ²	Process agenda for engaging diverse stakeholders in establishing shared agenda	<ul style="list-style-type: none"> • Develops shared vision across diverse stakeholders • Builds readiness for change • Promotes diverse stakeholders support for change goals
Engage stakeholders in system scanning.	System Scan Design Guide	Step-by-step instructions for designing a system scan	<ul style="list-style-type: none"> • Ensures system conditions are targeted for action • Incorporates diverse perspectives into system understanding
	System Scan Question Menu	Sample system scanning questions	<ul style="list-style-type: none"> • Engages diverse stakeholders in system understanding • Promotes critical consciousness and motivation for action
	PhotoVoice guide	Instructions for carrying out a PhotoVoice project	<ul style="list-style-type: none"> • Promotes value of vulnerable populations' perspective • Promotes critical consciousness and motivation for action
Engage stakeholders in sense making.	ABLe Sense-Making Guide	Methods for engaging diverse perspectives in making sense of system-scan data	<ul style="list-style-type: none"> • Promotes critical consciousness and motivation for action • Build readiness for change
	Prioritizing Worksheet	Techniques for prioritizing powerful and feasible change targets emerging from system-scanning process.	<ul style="list-style-type: none"> • Ensures change priorities consider community conditions and needs • Promotes diverse stakeholders support for change goals
Critical Process No. 2: Transform Collaborative Groups Into Systemic Action Learning Infrastructures Where Numerous Diverse Actors Become Agents of Change			
Process Activity	Tool	Description	Value for Promoting Action
Redraw system boundary.	Stakeholder assessment ³	Heuristic for intentionally identifying potential stakeholders to engage in the change effort	<ul style="list-style-type: none"> • Expands stakeholders to consider for action and inclusion in infrastructure • Promotes diverse stakeholder support for change goals
Create systemic action infrastructure: <ul style="list-style-type: none"> • Design the infrastructure • Create feedback loops 	Guide to Designing a Systemic Action Learning Infrastructure	Instructions for designing a systemic action learning infrastructure in response to local community dynamics	<ul style="list-style-type: none"> • Ensures safe spaces for authentic inclusion of diverse perspectives • Engages diverse stakeholders in learning and action processes
	Infrastructure Assessment	Assessment tool for determining if an existing infrastructure provides conditions for inclusive, collective action	<ul style="list-style-type: none"> • Supports development of inclusive infrastructure that supports collective action
	Weaving Cheat Sheet	Facilitation tool for identifying opportunities for weaving critical information across action teams	<ul style="list-style-type: none"> • Integrates knowledge and action synergy across action teams

² See http://systemexchange.org/application/files/8315/4265/7741/ABLe_ExampleSharedVisioning_11-19-18.pdf

³ See http://systemexchange.org/application/files/2615/3184/1197/ABLe_IdentifyingRelevantPerspectives_f.pdf

TABLE 1 (continued)

Critical Process No. 3: Create Collaborative Meeting Processes That Emphasize Action Over Information Sharing			
Process Activity	Tool	Description	Value for Promoting Action
Design agendas for action.	Shared Agenda Template	Template for creating a shared agenda around prioritized systems-change goals	<ul style="list-style-type: none"> Organizes meetings around taking action towards systems-change goals Promotes aligned actions
Support action between meetings.	Quick Wins Coaching Tool	Facilitator prompts to support quick-win actions between meetings	<ul style="list-style-type: none"> Reduces resistance to change Supports movement on actions
	Example Coaching Schedule	Process for providing support to stakeholders initiating quick-win actions between regular meetings	<ul style="list-style-type: none"> Reduces barriers to action encountered by stakeholders Promotes effective implementation and action success
Create culture of accountability.	Action Record Template ⁴	Template to document initiated and completed quick-win actions related to prioritized goals, including outcomes	<ul style="list-style-type: none"> Builds culture of accountability
	Run Chart Database	Database to automatically generate run charts summarizing initiated and completed quick-win activities	<ul style="list-style-type: none"> Builds culture of accountability
Critical Process No. 4: Emphasize Quick Wins to Galvanize Meaningful Actions, Build Momentum, and Expand Capacity for Change			
Process Activity	Tool	Description	Value for Promoting Action
Launch 100-day challenges.	100-Day Challenge Guide ⁵	Guide for engaging groups in identifying and achieving an ambitious and concrete result within 100 days	<ul style="list-style-type: none"> Promotes readiness for change and reduces resistance to change Engages diverse stakeholders in promoting actions in support of shared goals Builds culture of accountability Quickly creates movement towards action and shared goals
Create culture for quick wins: <ul style="list-style-type: none"> Identify quick-win opportunities Empower all stakeholders as agents of change 	Quick Win Facilitators' Cheat Sheet	Tip sheet for promoting quick-win actions during and after collaborative meetings	<ul style="list-style-type: none"> Promotes readiness for change and reduces resistance to change Engages diverse stakeholders in promoting actions in support of shared goals Shifts meeting focus to problem-solving and action Builds culture of accountability

Tools

⁴ See <https://www.dropbox.com/s/tnbm7l763hv2l1t/able-Systems-Change-Action-Record-Template.pdf?dl=0>

⁵ See <https://www.dropbox.com/s/t1zlm76fjtnfu0/ABLE%20Change%20100%20Day%20Challenge%20Planning%20Guide.pdf?dl=0>

Once a community has identified a prioritized goal and used data to understand outcome disparities, we engage diverse stakeholders in a system-scanning process to understand why targeted problems and inequities exist in their community.

generative vision can be a powerful mechanism for promoting inclusive change by reducing ambiguity around what to prioritize for action, and clarifying individual and collective roles for improving community systems.

Certainly, most community change efforts target a set of shared goals or prioritized problems; yet, broad goal or problem statements alone are often inadequate for mobilizing diverse stakeholders around transformative action. First, these statements can create uncertainty among stakeholders around how to bring about change, which in turn can delay action (Dearing, 2008). For example, a broad aim such as “increase children’s readiness for school” raises several questions that need to be answered before stakeholders can determine effective actions: What does “ready for school” look like? In what ways are children not ready for school in our community? Which children are the least ready for school, and why? When these questions remain unanswered, stakeholders often stall action due to uncertainty or take actions that unintentionally worsen local inequities because they are unable to tailor their efforts to address the needs of the most disadvantaged (LaChasseur, 2016).

Second, broad, vague goal or problem statements can increase the possibility of misaligned actions across settings (Dearing, 2008; Knott, Weissert, & Henry, 1999). In communities focused on increasing school readiness, for example, it is

common for definitions of school readiness to vary across settings, such as preschool and kindergarten classrooms. Because this definition influences decisions such as curriculum selection, assessment procedures, and parent-engagement practices, pre-K programs can inadvertently take actions (e.g., adopting new curriculum) in solidarity with the broad school-readiness goal that are actually misaligned with the readiness needs of kindergarten classrooms.

To overcome these challenges, effective visions clearly define shared goals and prioritized problems, clarify the populations experiencing the greatest inequities, and reveal the multiple reasons why targeted problems and inequities are happening (Wolff, Minkler et al., 2017). When diverse stakeholders are engaged in developing the vision, they discover their own role and value within the change effort (Wolff, Minkler et al.) — insights than can motivate aligned actions. When visioning processes increase critical consciousness about local conditions, stakeholders become committed to systems-change goals (Fear, Rosaen, Bawden, & Foster-Fishman, 2006). The following activities were designed to promote these insights while engaging diverse stakeholders in developing a shared vision for change.

Engage Stakeholders in System Scanning

Once a community has identified a prioritized goal and used data to understand outcome disparities, we engage diverse stakeholders in a system-scanning process to understand why targeted problems and inequities exist in their community. In contrast to more general needs-assessment processes, the system scan explicitly focuses on understanding deep system structures within organizations, neighborhoods, service delivery systems, and whole communities that explain how and why a place and its members behave as they do (Watzlawick, Weakland, & Fisch, 1974). This focus on system characteristics reflects the growing recognition that transformative change occurs only if and when the deep structures of a system are altered, as they determine the dynamics that create and maintain targeted social problems and inequities (e.g., Best, 2011; Lounsbury & Mitchell, 2009). The system scan focuses on six characteristics

identified as critical to system functioning (e.g., Coffman, 2007; Foster-Fishman, et al., 2007): mindsets, program components, connections, regulations, resources, and power. By making the system the focus of inquiry, the system scan engages diverse stakeholders in a critical analysis of the local community, helping to move the conversation away from victim blaming to a recognition that the community system propagates and maintains poor outcomes. A variety of methods can be used to gather system-scan data, including conversations, surveys, and large group processes.⁶

The system-scan data is incorporated into the larger visioning effort and processes are used to ensure diverse perspectives are valued as a way to address common power and privilege imbalances (LaChasseur, 2016). For example, diverse stakeholders can be organized into affinity groups representing individuals from the same system role (e.g., leader, staff, consumer) to promote safe spaces for dialogue and the inclusion of diverse perspectives (Burns, 2007). If certain stakeholders — particularly those experiencing the greatest inequities — are logistically unable to participate, facilitators can reduce resulting power imbalances by gathering their input in advance and centering the remaining vision work around their perspectives.

Michigan's Ingham Great Start Collaborative⁷ is a case example. The county collaborative facilitated a system-scanning process that initially gathered input from hundreds of diverse families and providers throughout the county. These findings were then brought into the monthly collaborative meetings for additional scanning and sense making sessions; stakeholders not part of the collaborative were also invited to these meetings. Participants initially sat in affinity groups with others who shared the same role (e.g., family member, direct service provider, leader, funder) and sought to identify root causes by asking questions about each of the six system characteristics (e.g., "What local

[S]ystem-scan processes often start with gathering the perspectives of individuals experiencing inequities, and then use these perspectives to guide what questions to ask other stakeholders with greater power and privilege (e.g., organizational leaders and staff).

policies and procedures are getting in the way of kids being ready for school?"). The system scan helped this collaborative foster action in several ways. First, the process helped the group quickly gather information from multiple perspectives on systemic root causes to guide strategy design and clarify the focus for subsequent actions; system-change priorities emerged from these conversations. Second, engaging a diverse set of stakeholders in the system-scan process, including stakeholders not yet involved in the collaborative, helped the collaborative expand the network of stakeholders aware of and concerned about the system conditions influencing early childhood outcomes. Immediately following these processes, new stakeholders joined the collaborative, increasing membership by almost 45 percent and improving overall participation in collaborative efforts. Third, the process improved stakeholders' ownership of shared goals; following the system scan, members who had never before been engaged in the work volunteered to lead actions and work groups.

While the system-scan process empowers all stakeholders to serve as "experts," it intentionally privileges the perspective of those

⁶To view the tools, listed in Table 1, see the System Scan Design Guide at https://www.dropbox.com/s/klrdb4ajfom1vnb/GENERAL_able-System-Scan-Design-Guide-6-15-18.pdf?dl=0 and the ABLe Change System Scan Question Menu at <https://www.dropbox.com/s/pxkaavphrini01p/Systems%20scan%20question%20menu%205-17-18.pdf?dl=0>

⁷See <https://inghamgreatstart.org>.

experiencing targeted problems and inequities to help recenter efforts within the margins (Ford & Airhihenbuwa, 2010), challenge existing assumptions and power dynamics (Beer, Finnstrom, & Schrader, 2016), and increase the engagement of these individuals in ongoing change efforts. For example, system-scan processes often start with gathering the perspectives of individuals experiencing inequities, and then use these perspectives to guide what questions to ask other stakeholders with greater power and privilege (e.g., organizational leaders and staff). Methods such as PhotoVoice⁸ (Wang & Burrell, 1997) can serve as a powerful scanning method to engage and privilege the perspectives of individuals experiencing targeted problems and inequities.

Engage Stakeholders in Sense-Making and Prioritizing

While many change efforts engage diverse stakeholders in gathering data on local problems, few also engage these stakeholders — particularly those experiencing inequities — in making sense of this information to inform action (Foster-Fishman, Law, Lichty, Aoun, 2010). Yet, sense-making is a critical activity for triggering critical consciousness and action, as it promotes further insights into community conditions influencing local problems and increases motivation to change these conditions (Fear et al., 2006). Engaging diverse stakeholders in the sense-making process not only can provide a more comprehensive understanding of the community system (Midgley, 2000), but it can also help to address power imbalances within collaborative spaces related to who has the privilege to frame local issues (LaChasseur, 2016).

Facilitators can use a variety of processes to promote collaborative sense-making. Processes that provide opportunities for stakeholders to reflect on patterns within their data and identify root causes to foster a deeper understanding of system

conditions and dynamics are more likely to promote critical consciousness and trigger action⁹ (Watts, Williams, & Jagers, 2003). To leverage the motivation and concern triggered by these processes, facilitators can engage stakeholders in identifying root causes on which they can start to take action immediately. Stakeholders also prioritize system-scan themes to target for change and these priorities are integrated into the shared vision and shared agenda for action.¹⁰

A case example is Ready for School, Ready for Life, an early childhood system-building initiative in Guilford County, North Carolina, that aims to improve birth outcomes, ensure on track development starting at birth through preschool, and help all children be ready for school. Launched in 2014, initiative leaders adopted ABLe Change as one of the frameworks to enhance their inclusion of diverse perspectives and build a communitywide vision for early childhood systems building. As part of the system scan, community conversations were held with over 240 diverse families and hundreds of local professionals and leaders representing the range of health and community-service agencies. To ensure broad support for the initiatives, diverse stakeholders were engaged in making sense of these data and integrating the findings into a shared vision. Given the compelling story families of young children told of exclusion and the need for a more responsive system, a PhotoVoice project was launched to further capture their voices and engage them as change agents. To further engage the full community in adopting the vision and mobilizing for action, the initiative held an Early Childhood Summit in early 2015 where 450 community stakeholders learned about the importance of early childhood and had an opportunity to examine local data related to the vision and to volunteer for action in support this vision. A communitywide communications campaign designed to support the initiative's vision was also launched to build

⁸ For a guide to using the PhotoVoice tool, listed in Table 1, see <https://www.dropbox.com/s/3zmom0dyqzg2zzh/able-pv-manual.pdf?dl=0>

⁹ For sample processes, see the ABLe Sense-Making Guide, listed in Table 1, at https://www.dropbox.com/s/z9c7zk4fs2mlbr0/GENERAL_ABLe%20Sense-Making%20Guide_6-15-18.pdf?dl=0

¹⁰ To view the System Scan Prioritizing Worksheet, listed in Table 1, see <https://www.dropbox.com/s/1246yr1rad54b5j/able-prioritizing-system-change-targets-0605182.pdf?dl=0>

public will around early childhood. Four years later, this vision still drives the work and engagement of local stakeholders, including families, continues to expand.

Critical Process No. 2: Engage Numerous Diverse Actors as Agents of Change

Change initiatives often struggle with how to best design their community change infrastructures in ways that engage diverse stakeholders and effectively support action. Questions concerning who to invite to the table(s) and how to organize and structure stakeholders into effective groups pose quandaries for even the most seasoned network managers and backbone staff. And these questions are critical: The infrastructure design that emerges within a community can have a profound impact on whether or not critical actions emerge and the collaborative effort succeeds (ORS Impact & Spark Policy Institute, 2018). Unfortunately, typical infrastructure models often create environments that unintentionally impede diverse stakeholder action. For example, many communities struggle to effectively engage residents (ORS Impact & Spark Policy Institute, 2018) and, as a result, few incorporate significant numbers of residents in their infrastructures or engage them in action (Wolff, Minkler et al., 2017). In addition, in the traditional coalition model, the collaboration can involve too many members to meaningfully engage stakeholders in discussions that motivate action (Foster-Fishman & Watson, 2012). As a result, many coalitions create smaller, nested, hierarchical groups to accommodate more stakeholders, but these structures can quickly become encumbered in approval steps and regimented processes that can delay and even impede action (ORS Impact & Spark Policy Institute, 2018). These structures also often reify existing power and privilege dynamics (Neal & Neal, 2010), with authority and governance decisions typically centralized within the executive or governance group containing the “community elite” (Ryan, 2008). As a result, other stakeholders can become disenfranchised from the collective effort as they find their agenda or engagement in decision-making suppressed by these processes

The infrastructure design that emerges within a community can have a profound impact on whether or not critical actions emerge and the collaborative effort succeeds.

(LeChasseur, 2016). Together, these structural configurations inadvertently create spaces incongruent with the type of problem solving and action needed to tackle complex social issues.

Inclusive change efforts need nimble structures that empower diverse stakeholders to innovate and take actions around the shared vision while coordinating actions to leverage larger systems change (ORS Impact & Spark Policy Institute, 2018). This is more likely to occur when infrastructures leverage the wisdom within the “crowd” (Surowiecki, 2004) by providing individuals with opportunities to connect, share, and problem solve around relevant information; the authority to act on these insights; supports to learn quickly about these actions and respond accordingly; and processes to quickly distribute this knowledge across the network (Foster-Fishman & Watson, 2012; Marion & Uhl-Bien, 2001). We have found two tools and processes useful in creating these conditions: redrawing system boundaries to expand who gets invited to the table (Midgley, 2000; Wolff, Minkler et al., 2017); and creating systemic action organizing structures to engage diverse stakeholders as actors of change (Foster-Fishman & Watson, 2012).

Draw System Boundaries to Include Diverse Perspectives

Complex social problems such as education, employment, homelessness, and health emerge from an array of interacting conditions that are impossible for any given stakeholder to fully see and understand (Ulrich & Reynolds, 2010). Successful efforts strategically redraw their system boundaries to intentionally include the

Systemic action learning infrastructures are powerful organizing mechanisms for engaging diverse stakeholders in community-based change efforts.

variety of perspectives needed to fully understand and address this complexity (Checkland & Scholes, 1990). Because most communities have histories of excluding critical perspectives (e.g., Wolff, Minkler et al., 2017), the act of redrawing current engagement boundaries can communicate value and legitimacy to previously silenced perspectives (Peirson, Boydell, Ferguson, & Ferris, 2011) and expand the array of stakeholders available as actors of change. System boundaries can be redrawn at any phase of a change effort. To support the boundary-expansion process, we provide communities with a simple heuristic to aid their identification of additional stakeholders and perspectives to include in their efforts:

- individuals directly experiencing the problem. Attention to the diversity within this group is essential, so we encourage communities to consider a variety of demographic, experience, and geography categories (and their intersectionality) and to recruit with attention to this diversity, ensuring inclusion of those who are experiencing the most inequities;
- direct service providers across sectors who are or should be engaged with individuals experiencing the problem. We have found the social determinant of health categories (Healthy People, 2020) an easy framework to guide identification of relevant providers because it encourages attention to the array of conditions causing community problems;
- neighborhood intermediaries who support those experiencing the problem (e.g.,

faith-based leaders, neighborhood organizations, advocacy groups); and

- leaders of local cross-sector institutions or organizations, funders, and elected officials. We intentionally include multiple leadership levels to ensure efforts engage actors representing vertical organizational layers.

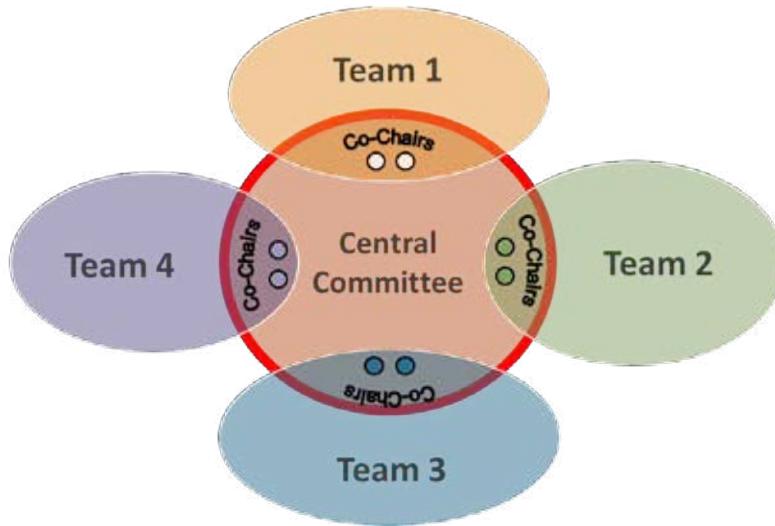
Develop a Systemic Action Learning Infrastructure

Systemic action learning infrastructures are powerful organizing mechanisms for engaging diverse stakeholders in community-based change efforts. Individuals are convened into separate affinity groups — referred to as systemic action learning teams (Burns, 2007) — organized around similar roles (e.g., family members, providers, leaders, funders) or outcome and strategy areas. Affinity groups are intentionally designed to provide safe spaces for diverse stakeholders to solve problems, influence decisions, and initiate action with others sharing their unique perspective. For this reason, attention is paid to the local dynamics that can interfere with engaging diverse stakeholders in authentic dialogue and collective action, such as a history of poor relationships among local agencies, distrust and cynicism between individuals within these agencies, and failed or absent attempts to engage local youth and families.

A case example is a system-of-care initiative in Saginaw, Michigan (Foster-Fishman & Watson, 2012), that set out to create a new infrastructure to support a systemic action learning process. Initial assessments revealed several community dynamics influencing infrastructure design: youth and families had little experience participating in decision-making groups, key public agencies involved in the effort had a history of interorganizational conflict, and leadership and staff within these organizations had a great deal of mistrust. In response, the conveners made the following design decisions:

- Spaces were created strictly for residents to develop skills in voicing their concerns before joining other decision-making tables.

FIGURE 1 Sample Systemic Action Learning Infrastructure



Tools

- No private-sector organizations were brought to the table at first, which gave the public organizations time to first improve their relationships.
- Staff and leaders were separated into their own affinity groups (e.g., cross-sector leaders with leaders, staff with staff) to promote space for honest dialogue.

Attention to these local dynamics created the context for success: Stakeholder engagement grew quickly as participants found the affinity group format empowering to their unique perspective. The authentic discussions and problem-solving sessions that emerged triggered more than 80 systems-change actions within the first six months; these actions led to significant systems improvements, including policies and procedures that increased access to mental health services and enhanced multisector service coordination.

Systemic action learning engages stakeholders in these “parallel and interacting” affinity groups to address shared goals (Burns, 2007). These teams

use iterative, rapid action-learning processes to define and understand local problems, design strategies to address those problems, carry out actions, and learn for continuous improvement from their unique perspective. While each group works separately, backbone staff works to integrate knowledge and action between the groups by “weaving” critical information about emerging insights, questions, and action ideas across the teams and with relevant stakeholders outside the infrastructure. These rapid-feedback loops help to integrate diverse perspectives (Surowiecki, 2004) into other action teams while maintaining the confidentiality of specific individuals from each team.¹¹

A change effort can also establish a central coordinating committee to engage team co-chairs in real-time weaving. (See Figure 1.) Overall, this infrastructure model also helps to legitimize typically undervalued stakeholders by helping the community understand, value, and use their resources (e.g., knowledge, skills, relationships) to promote collective action (Watson & Foster-Fishman, 2013).

¹¹ For a tool to help identify opportunities for weaving, see the ABL^e Change Weaving Cheat Sheet, discussed in Table 1, at <https://www.dropbox.com/s/akpqlup581rj1am/Weaving%20Cheat%20Sheet.pdf?dl=0>

A childhood obesity effort supported by the Down East Partnership for Children, in Rocky Mount, North Carolina, is a case example. Partnership staff assessed the boundaries of the community's health improvement efforts and recognized that most of those with obesity problems — low-income African American and Hispanic residents — were excluded from decision-making and action processes. They formed a resident action team, engaging them as agents of change and creating feedback loops between the residents' group and existing collaborative infrastructures and organizations. This resident group became a critical structure within the larger service system, recasting the role of residents from these low-income neighborhoods and institutionalizing the engagement of resident voices. Within just a few years, significant outcomes for participants, the partnership, and the community emerged. Participating residents demonstrated increased agency and expanded their leadership roles, independently initiating changes within the community. Several joined boards of local organizations and/or became employed as a result of their role in this group. Within the community, several local organizations shifted their policies and practices to better support local health as a result of the residents' actions — food policies shifted within the YMCA, for example — and more families increased their health literacy and connections to local resources such as SNAP and well-child pediatric visits.¹²

Critical Process 3: Emphasize Knowledge Generation and Action During Meetings

The facilitation and meeting processes of collaborative groups establish the climate for action within change initiatives (Carmell & Paulus, 2014). Opportunities for effective action are most likely to emerge when diverse stakeholders are inspired to make a difference, have opportunities to share and integrate their unique knowledge sets to understand problems and generate novel

insights, and are encouraged to develop and carry out creative solutions (Baruah & Paulus, 2009). While many collaborative groups have developed sophisticated information-sharing practices (to keep each other updated on local programs, etc.), effective processes for promoting problem solving and action are less common. Baseline data from communities with which we partner often identify the meeting processes as a critical barrier to promoting action. Some community partners have even named this problem: "Sit 'n Gits," where diverse stakeholders meet, sit, get information, and leave. To help shift these habits, we have designed specific tools surrounding the meeting agenda, minutes, and implementation supports to encourage and nurture a climate supportive of action and continuous improvement within the action teams. (See Table 1.)

Design Agendas for Action

Agendas are widely recognized as a critical tool for having an effective meeting (Kruse, 2015) and for establishing the norms regarding meeting focus and priorities. We promote two agenda processes to encourage the focus on action and learning. First, we organize the agenda around prioritized systems-change goals to maintain the focus on changing the system and to facilitate coordinated action. Each systemic action learning team has an agenda organized around these priorities, though the work for each group is varied given their roles, interests, and spheres of influence. Second, because effective community change processes encourage continuous improvement (e.g., Porter, Martin, & Anda, 2016), we language the agenda items around problem-solving and action questions to create a culture of inquiry around all phases of the work. For example, if a prioritized goal is "promoting service coordination," we include questions to identify and understand areas of excellence ("What is an example of coordination working this past month?" "What did that look like?" "Why was it successful?" "Where

¹²For more details, see the ABL Change Guide to Designing a Systemic Action Learning Infrastructure and Infrastructure Assessment, listed in Table 1, at <https://www.dropbox.com/s/jmw96todpevlocq/Guide%20to%20designing%20an%20ABLE-infrastructure-060115.pdf?dl=0> and <https://www.dropbox.com/s/9fpy7ij3i3ex40w/Assessment%20of%20Your%20Efforts%20Infrastructure.pdf?dl=0>

else might this work?”) and current challenges (“What is an example of coordination not working this past month?” “What did that look like?” “Why did it break down?” “What else might we need to understand?” “What can be done about this?”). Both areas of inquiry help to cultivate a climate where stakeholders generate new knowledge about the targeted problem that can be integrated into novel solutions (Kohn, Paulus, & Choi, 2011). As the discussion proceeds, an action orientation is supported through questions such as: What does this suggest an important next step might be? What else do we need to understand before we act? This culture of inquiry can also promote rapid feedback about implementation efforts and encourage continuous learning and improvement efforts¹³ (Patton, 2011).

The power of adopting an action orientation with collaborative meetings is well illustrated in the case example of the transformation experienced by Smart Start Norman, an early childhood collaborative. The collaborative had been meeting for over 10 years, with recent meetings focused mostly on information sharing, such as organizational updates. Meetings were poorly attended (fewer than 10 people a month) and little action was generated. The collaborative’s coordinator decided to launch a system scan to elicit conditions that impeded early childhood success. Her hope was that an authentic conversation about the early childhood system would re-energize members, and it did; within a few months monthly meeting attendance increased to more than 20 people. She then developed a shared agenda based on the group’s system-scan priorities and reorganized the meetings to focus on designing strategies to address these priorities.

In this revamped process, members were now highly engaged and interested in taking action because the meetings were focused on addressing issues members themselves had learned about and prioritized through the scan. One priority, for example, was the low level of well-child visits to pediatricians and immunizations

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after age 5. After learning more details about the root causes of the problem, the group launched a series of actions to create a context that encouraged these healthy behaviors. Teachers and Oklahoma Department of Human Services workers received protocols to talk with parents about well-child visits and immunizations. Health clinics revised their processes to automatically remind families to schedule their next visit. The group also helped schools to add questions to their annual enrollment forms asking about the last well-child visit and to follow up with families showing lapses. These systems changes helped create the contextual coherence needed to reinforce families’ increased engagement in well-child visits and immunizations.

Support Effective Implementation Between Meetings

Stakeholders who volunteer to initiate action often need support behind the scenes; they often experience barriers to carrying out actions or simply fail to act (Fixsen et al., 2005). Providing support between meetings can promote more effective implementation and help ensure continued momentum (Powell et al., 2015). This support is particularly important to ensure all stakeholders — regardless of initial skills, resources, and social connections — have equitable power and opportunities to take action as part of the change efforts.

¹³ For sample questions to promote learning and action, see the ABL e Change Quick Wins Guide, listed in Table 1, at https://www.dropbox.com/s/jjob90n13zxtaf1/5.%20ABLe%20Change%20Quick%20Wins%20Guide_5-28-18.pdf?dl=0

One way to support action between meetings is to develop actionable meeting minutes that summarize in detail the group’s discussion and all action items. A second approach involves contacting those members tasked with action items to ensure they can carry them out effectively.

One way to support action between meetings is to develop actionable meeting minutes that summarize in detail the group’s discussion and all action items.¹⁴ A second approach involves contacting those members tasked with action items to ensure they can carry them out effectively.¹⁵ Stakeholders are more likely to carry out actions when they believe they have the capacities to implement them well (Honig, 2003); providing technical assistance to support and build these capacities has been shown to increase the effectiveness of local change efforts (Spath & Greenberg, 2011). The best method (e.g., phone, email) for this behind-the-scenes coaching and technical assistance will depend on local community dynamics. Regardless of the method, it is essential to identify someone who can provide this coaching: It ensures members will come to each meeting ready to celebrate their progress and foster the group’s momentum. When staffing support is limited, group members can alternate these support roles.

Create a Culture of Mutual Accountability

Large stakeholder networks often experience “social loafing” (Karau & Williams, 1993), with partners assuming someone else will take necessary actions. Creating a culture of mutual accountability, where each individual is viewed as a critical actor of change who shares responsibility for taking actions, is a critical prelude to large-scale systems change (e.g., Hargreaves et al., 2017). To support this approach, we encourage groups to create and use “action records” that document initiated and completed actions and resulting outcomes.

Excel run charts are excellent visual summaries of action records that can help stakeholders review and celebrate progress, compare actions across change goals, and identify gaps in action. For example, backbone staff can create individualized run charts for each organization or team to illustrate their initiated actions compared to a de-identified summary of actions initiated by others; these summaries help organizational leaders track, and if necessary adjust, their own progress and efforts in the collective work, boosting mutual accountability.¹⁶

In the case example of another system-of-care initiative, a key partner agency was not engaged in action at the level needed. To address this issue, a customized visual run chart was developed and shown to every agency leader so they could consider their own organization’s activity level in relationship to the actions of others within the community. Leaders were asked to consider such questions as, “What does this chart tell you about the actions within this community and within your own organization?” “Moving forward, what would you like your action chart to look like?” “What supports could help you achieve this goal?” Leaders were also invited to have a private coaching call to further discuss these questions. This approach

¹⁴ For a sample format for meeting minutes, see the Shared Agenda template, listed in Table 1, at https://www.dropbox.com/s/ltxq4oqmexm4o2v/ABLe_Shared%20Agenda%20template_3-16-18.pdf?dl=0

¹⁵ As listed in Table 1, see the Quick Wins coaching tool at https://www.dropbox.com/s/03ruhhc8nuvzf7/Quick%20Wins%20Coaching%20Tool_5-28-18.pdf?dl=0 and a sample coaching schedule at <https://www.dropbox.com/s/cepfjnqyj94vtkg/Example%20coaching%20schedule.pdf?dl=0>

¹⁶ To access the run chart database tool listed in Table 1, see <https://www.dropbox.com/s/7w7bajcmbkz7yv6/Sample%20Quick%20Win%20Tracking%20Database%205.1.18%20template.xlsm?dl=0>

effectively re-engaged this agency; the leader, unaware of the lack of action within his agency, committed to increasing activity levels and within the year the agency's related actions increased more than tenfold.

Critical Process No. 4: Emphasize Quick Wins

Sometimes the very notion of taking on “yet another thing” is overwhelming for even the most committed stakeholders. For this reason, we adopted a focus on promoting quick wins — changes that are small enough to seem plausible but significant enough to matter given the purpose of the change effort (Weick, 1984). A typical quick win takes less than three months to accomplish and engenders little resistance because it tackles desirable improvements within the system that lay the foundation for larger system, policy, and practice changes (ORS Impact & Spark Institute, 2018). Because quick wins demonstrate the possibility of change within a short period of time, they exponentially grow capacity for change (Foster-Fishman, Fitzgerald, Brandell, Nowell, Chavis, & Van Egeren, 2006; Schaffer & Ashkenas, 2005); each change instigates more action and motivates more system members to pursue change, accelerating progress towards larger goals through their cumulative impact (Anderson, 1999; Weick, 1984). We focus on quick wins throughout all stages of our community change work. The following are the two most effective techniques we have used to promote them:

Launch 100-Day Challenges

Hundred-day challenges are collaborative projects designed to accomplish a specific goal, and tackle system improvements such as revised intake processes to reduce delays and pilot projects to address service-system gaps. Based upon the work of the Rapid Results Institute (Matta & Morgan, 2011; Schaffer & Ashkenas, 2005), 100-day challenges are intended to shift how participants think about the pace and possibility of change and about who can serve as a change agent within a community. It is not uncommon for communities and funders to believe that “change will take time.” This mindset can be a

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significant impediment to change, since work tends to fill the time available (Parkinson, 1957): If stakeholders believe that change should take years to accomplish, they are likely to design their processes and strategic plans in ways that support this temporal belief. These challenges aspire to create a new temporal synchronicity (Ryan, 2008) around the pace of change by creating the explicit expectation that significant results can occur within 100 days, which can be particularly powerful given that many communities become stuck or lose momentum in extended planning processes (Miller & Burns, 2006).

In addition to creating new norms around the pace and feasibility of change, 100-day challenges also serve as incubators for new habits and practices within a community. As alternative, temporary settings (Moos, 2003), they can provide a safe space for innovation and for “threading reform ideas” (Coburn, 2003, pg. 7). For example, we incorporate into our challenges the design-thinking practice of developing “empathy” for targeted populations (IDEO, 2015), where all challenge teams are expected to engage local residents to understand their lived experience and design in response to this insight. We also incorporate a rapid-cycle improvement process (Schaffer & Ashkenas, 2005) to enhance local problem-solving and learning capacities, which further expands readiness for

A quick-win focus can be emphasized in all stages in the life cycle of a project or change initiative by integrating the quick-wins lens into conversations and action-team meetings.

change (Cunningham et al., 2002). Finally, local implementation capability is enhanced as large numbers of stakeholders, including local residents, direct care providers, and organizational and community leaders, are simultaneously engaged in system improvements (Schaffer & Ashkenas).

In a case example, 100-day challenges were launched as part of the North Carolina early childhood initiative to spark immediate action and debunk the belief that “change never happens here.” These challenge teams were launched at the Early Childhood Summit, where stakeholders examined the new shared vision for change and suggested challenge ideas to spark action towards shared goals. Twelve challenge teams, engaging 146 parents and community stakeholders representing 44 agencies and organizations, tackled such issues as improving transition from pre-K to kindergarten, increasing access to culturally relevant literacy programs, and building a breastfeeding-friendly community; one team that included families focused on engaging families as change agents. Teams were trained in action-learning processes and received regular coaching to support their implementation. A post-challenge celebration was held to allow teams to share their successes and identify next steps in the work. In addition to launching the shared vision, the challenge fostered several mindsets and new habits for working that persist today: Stakeholders have integrated the

process of gathering family input as an integral part of design and continuous improvement, the belief that change is possible has become more prevalent, and stakeholders seek quick wins and actions in their current work. Stakeholder engagement in efforts to build early childhood systems expanded significantly through these challenges, and many of the early childhood strategic objectives pursued today were launched during those challenges.

Create a Culture for Quick Wins

A quick-win focus can be emphasized in all stages in the life cycle of a project or change initiative by integrating the quick-wins lens into conversations and action-team meetings. For example, meeting facilitators prime stakeholders for action when they ask questions that seek to understand (e.g., “What else do we need to learn before we can move to action?”) and resolve local problems (e.g., “What can we do to address this barrier?” “What next steps could be taken to move this work forward?”). When they ask questions that situate action within the group and leverage opportunities and interests (e.g., “What quick win actions can you take in the next month to help solve this issue?”), they develop concrete action items.¹⁷

Empower All Stakeholders as Agents of Change

It is not uncommon for stakeholders who are not leaders (e.g., low-income families, direct-line staff) within a community system to feel powerless in their roles. Because transformative change requires action across diverse settings and layers (Schaffer & Ashkenas, 2005), creating the conditions for stakeholders to locate their agency or power within the system and take actions leveraging that power base is essential (Lipmanowicz & McCandless, 2014).

For example, facilitators can ask questions during action-learning meetings to help individuals creatively identify feasible actions they can implement within their scope of influence (e.g., “What do you have the power in this situation

¹⁷ For sample quick wins, see the ABLe Change Quick Wins Guide, listed in Table 1, at https://www.dropbox.com/s/jjob90nl3zxtaf1/5.%20ABLe%20Change%20Quick%20Wins%20Guide_5-28-18.pdf?dl=0

to influence to change?” “What does the system need from you and your peers in order for this to work?”). To build the value of all stakeholders as agents of change, action teams are asked about potential activities others could implement to support their efforts. Questions concerning these action opportunities are then integrated into upcoming meeting agenda.¹⁸

Successes and Limitations of the Framework and Tools

Communities are easier to mobilize around an action focus when critical capacities are in place. Others have highlighted the importance of backbone staff in collaborative efforts (Kania & Kramer, 2011), and we, too, have found that either paid staff or consultants with strong interpersonal, organizational, and action-learning facilitation skills are needed to effectively support the movement towards action and learning. In general, we have found that for a robust set of effective actions to emerge, about 10 to 15 hours per week of staff time for every three to four affinity teams is needed to support the practices described in this article; more time is needed if the practices run significantly counter to the status quo.

This focus on action is also more likely to succeed when local organizations or communities are not in a crisis/survivor mode. When organizations face insurmountable caseloads and administrative tasks, organizations are less likely to actively engage in collaborative efforts (Hoeft & Sponseller, 2018). Finally, the support and active engagement of top organizational leaders is essential in work that aims to transform the status quo. Actions pursued by other stakeholders become stalled and key policy and procedure changes remain elusive if key leaders are not engaged as agents of change.

The Role of Foundations

As institutional theory (Scott & Meyer, 1994) reminds us, organizations adjust their behavior to align with the norms and expectations of

This suggests that if foundations wish to support the creation of an inclusive change culture, they could consider modeling and promoting norms and practices that foster inclusion and a movement to effective systems-change actions.

their environment, particularly those of their funders. For these reasons, funder expectations can significantly influence the shape and success of community change efforts (Chaidez-Gutierrez & Fischer, 2013). This suggests that if foundations wish to support the creation of an inclusive change culture, they could consider modeling and promoting norms and practices that foster inclusion and a movement to effective systems-change actions. Specifically:

- Foundations should continue to work to recast the roles of the less powerful within communities, including establishing explicit expectations around the active engagement of disenfranchised populations. This engagement needs to include more than providing input or having only a few residents sitting on governance bodies; youth, adults, and families living with the targeted problems should be actively engaged in designing the vision, establishing the agenda, and participating in all stages of implementation, decision making, and learning. Because this practice continues to be relatively new for many communities, foundations can play an important role in establishing norms that value such engagement and investing in building the capacity of residents to engage in these ways. This

¹⁸ For sample facilitation questions to support this process, see the Quick Win Facilitators' Cheat Sheet, listed in Table 1, at <https://www.dropbox.com/s/rbfkw9sfmzdp1lj/Quick%20Win%20Facilitators%20Cheat%20Sheet.pdf?dl=0>

includes holding local decision-makers accountable to resident feedback.

- Contracting, monitoring, and reporting processes provide significant opportunities to further support norms for inclusive, transformative change. Adaptive contracting that encourages course corrections can create more transparency about the challenges inherent in this work and enhance the likelihood that grantees will adjust in response to community needs (Porter, Martin, & Anda, 2016). An inclusive change-making agenda (Brown, 2012) could be enhanced if systemic action and learning processes become integrated into contracts, monitoring, and reports. And, of course, reducing the frequency and length of reports will better align these requirements with grantee resources and change-effort needs.
- Foundations can help to debunk the myth that change takes time by intentionally promoting readiness for change (Easterling & Millsen, 2015). Shifts in local policies and practices can actually happen quickly, but only when communities believe that change is possible, systems change becomes the focus of the work, and change initiatives support quick action across diverse stakeholders (Foster-Fishman & Watson, 2012). Resources, through minigrants and supports to promote quick cross-sector action and learning, could further help to debunk this myth and create a culture for change.
- Foundations can work with other local funders to create aligned outcome and reporting frameworks to build synergy and reduce reporting burdens. These frameworks should include short and intermediate outcomes that emphasize systems change, effective implementation, and adaptive learning, as these create the foundation for inclusive transformative change.
- Foundations can invest in what Morgan (2015) calls “general community capacity”. This includes the ability to build honest

relationships across diverse stakeholders, engage in difficult conversations, share power and decision-making authority, address local inequities and structural racism, and pursue collective action. As many communities face the aging out of local leaders, investments in building such capacity are particularly important to ensure the next generation of leaders are equipped to promote transformative change.

Finally, foundations, just like other stakeholders within a system, need to recognize their power and influence and instigate change within that sphere of influence. Many community change efforts would benefit from foundations leveraging their networks and influence to shift community norms and mindsets and to align business and government policies with change goals (Brown, 2012).

And, of course, collaborative efforts that promote inclusive change would not succeed if some level of backbone staff did not exist. While many foundations invest in launching backbone organizations or supporting such efforts for a limited time, it is less common to find sustained funding for backbone functions. The disinvestment in these infrastructures reduces collaborative capacity and significantly stalls community change efforts as they work to restructure themselves to accommodate the loss of this support. Foundations have a significant opportunity to support transformative change by providing matching funds to encourage local and state governments to sustain these roles.

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