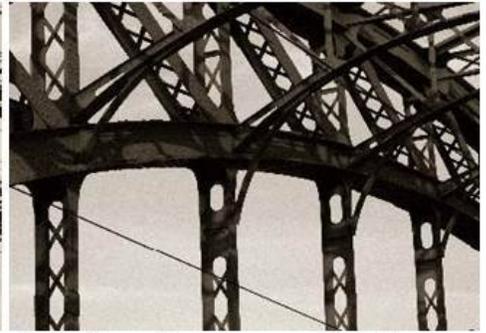


CRITERION INSTITUTE



Shaping Market Systems Initiative

CONVERGENCE XV: FULL CONVERSATION LISTING

Set A: How Do Systems Change? Tuesday 10:15-11:30 AM		
Breaking the Frame: Rules and Cultural Mindsets Talcott	<p><i>Frame: a basic structure that underlies or supports a system, concept, or text.</i></p> <p>This conversation assumes that shifting systems is cultural work. There are a set of ideologies, mindsets, deep cultural rules that the change you seek challenges at a fundamental level. Nothing really changes until we shift the mindset of the actors in the system.</p> <p>And, we are imprinted by the dominant system, and often don't see possibilities outside of it. We then build systems which reflect our mindsets. And so the mindsets are imprinted on the rules of the system. And so it goes.</p> <p>As an example, what will it take to reframe modern portfolio system? This reflects both an ingrained mindset, reinforced by structures that keep it in place.</p> <p>What is particularly challenging about breaking the frame of market systems? Which efforts around impact investing or new economy are breaking the frame, and which ones are redirecting existing beliefs?</p> <p>Where do we acknowledge racism, sexism and other forms of bias within these belief sets? How are those relevant to the conversations about market systems?</p> <p>In market systems two beliefs are at play, the cultural about economic systems but also the deep belief that this system is out of reach.</p> <p>How does breaking the frame work? For example, do you look to build on what is already understood? Reveal something new about something commonly understood? Or do you want to blow up their mindset?</p> <p>Given that there are deep emotional issues when you break the frame, when can you get past that to impact and not backlash?</p>	Joy Anderson Josh Arnow Bonnie Foley Wong Andy McCarroll Sally Boulton Sarah Brooks Octavia Hudson Jim Davidson Gary Gunderson

	<p>As an organizing theory of change, how does this shape or define how you develop strategy? What strategies do you reject? What do you lean toward? What kinds of collaborations work?</p> <p>What is the impact that is sought in breaking the frame? How do you measure?</p> <p>“Change requires meeting people where they can hear a message of change and not feel terrified, or powerless.” Chris Peck</p> <p>“The mainstream believes that people will maximize their utility from activities but in fact there are lots of examples of where people make bad economic decisions due to other social factors.” Steven Godeke</p> <p>“Changing the game means upending the status quo and moving institutions to think differently and respond differently to market forces. This probably will take federal-level policy change and new funding opportunities.” Gregory Heller</p> <p>“The reductionist investment mindset has enabled great technological and commercial achievements and improved standards of living while simultaneously leaving a global wake of destabilizing economic gaps and devastating environmental deterioration.” Joshua Arnow</p>	
<p>SLOW, steady, Change</p> <p>Laurel A</p>	<p>It takes 10 Years to make anything happen. Sigh. Rather than grieving, in this conversation we acknowledge it and build efforts that embrace a normal pace of change.</p> <p>Are we celebrating slow change or simply coping with the slowness as a flaw? Does “slow as failure” work against or for us?</p> <p>How do you shift how you think about change if you assume it will be slow?</p> <p>How is this conversation particularly relevant to market systems? Can’t market forces accelerate the pace of change?</p> <p>What is the role of urgency? The problem, the challenge is pressing. Disasters and crises are created in a moment. But system change is slow. How do we lead, communicate, engage, given this paradox?</p> <p>What drives slowness? Is it the nature of systems or the nature of strategies? Is it a set of values about what creates durable change? For example, strategies such as organizing to build a network, intentionally, take time. What are the other ways of understanding change, that fall within a set that we could think of as slow change?</p>	<p>Cheryl Dahle</p> <p>Allen Ludgate</p> <p>Kaliya Hamlin</p> <p>Gregory Heller</p> <p>Chris Peck</p> <p>Robert Ricigliano</p> <p>Jim Boyd</p> <p>Michael Pergola</p> <p>Shawn Smith</p> <p>Sara Shroff</p>

	<p>How do we build the capacity of the system to change itself and resilience within the system? This would argue against radical disruption or displacements.</p> <p>How do we design our work, our organizations, to reflect an assumption of slow change?</p> <p>Many of the structures that support the work are not set up to support the reality of slow change. They have 2 year planning cycles, or annual budgets. Where are the natural supports for slow change? How do you challenge existing systems to acknowledge slow change?</p> <p>How do you know that you are on the right track?</p> <p>How do you intentionally incorporate calculations of time into communication and strategies, rather than simply defecting cries for urgency?</p> <p>“Change happens when you restructure practices and systems that support markets to align with the behavior change you want to see. And it occurs when you convene players in a system to collaborative own and vest in making that shift.” Cheryl Dahle</p> <p>“And as we discussed in the NY convening, we really need to address our timeframe problem – the endless chase to patch together 6 and 12 month planning grants is no way to tackle systems that evolve in close to geologic time.” Allan Ludgate</p> <p>“First, I subscribe to the fundamental principle that to make change in any complex, adaptive environment, one must engage systems to affect how they change and evolve over time (e.g. systems change best, when systems change themselves).” Robert Ricigliano</p>	
<p>Orchestrated Swarming of the System</p> <p>Atrium</p>	<p>So many market interventions are single audience, single product innovation that can’t achieve large scale change in a complex industry. Rather we need to siege from all sides. Top down, bottom up, from the inside, from the outside, both connecting the dots and disrupting the core. All at the same time.</p> <p>“Think big and swarm from multiple directions.”</p> <p>What kinds of systems respond better to swarms? What kinds of leverage can you gain?</p> <p>Do swarms need to happen in formation?</p> <p>But the assumption is that this needs to be coordinated in some way. Why? This</p>	<p>Rachel Sinha</p> <p>Anna Muoio</p> <p>Peter Battisti</p> <p>Bruce Campbell</p> <p>William Fisher</p> <p>Liz Schaffer</p> <p>Steve Godeke</p> <p>Lynnea</p> <p>Brinkerhoff</p> <p>Caroline Heine</p> <p>Melissa Hoffman</p>

	<p>kind of coordination is complex. What are the variables in that complexity?</p> <p>Systems change is often, then, the design of the coordination mechanism. How do you measure your impact as a coordination mechanism (if you are not actually in the swarm)?</p> <p>What are the subtle signaling mechanisms that can create more organic flocking or swarming? Think about networks or memes rather than intentional or hierarchical coordination.</p> <p>Aligned action is thought of as “tight” on the ends “loose” on the means.</p> <p>How do these theories of change incorporate understandings of difference and structural inequities? How does it resist or deflect the same?</p> <p>How do you think about a local swarm? Can you swarm global?</p> <p>“How to more adequately map the flow of money and value across the interlocking systems so that the resources and assets locked in the frozen disorder of the current patterns is freed to move in more rational and meaningful ways to advance the health that both faith and science see as possible.” Gary Gunderson</p> <p>“I am a fan of “going big” to define the system, the narrative, and the desired outcomes, then “swarming” the problem in lots of ways from lots of directions, with thoughtful feedback / learning loops built in to make smarter investments over time. Said another way, I think innovation is strongest if we are “tight” on the ends and “loose” on the means.” Allan Ludgate</p> <p>“Change happens when a number of interrelated structures emerge simultaneously. It is necessary to create new organizational structures, culturally, socially and economically. In order for this to take place, however, there must be a team of committed individuals who have the understanding and emotional resilience to see and act in a new way.” Michael Pergola</p> <p>“My organization [Global Fund for Women] is authentically global and multi-contextual. Ironically, its challenge is to be less multi-contextual and drive efficiency.” Liz Schaffer</p>	
<p>Innovating Toward a New Future</p> <p>Laurel B</p>	<p>A new future is going to be created through ingenuity and innovation. We create a set of interventions where new solutions become possible.</p> <p>This isn't the one shot solution, where we assume we can flip a switch and the solution will magically transform the system, but it does assume that without imagination, innovation, invention the system cannot change.</p>	<p>Michele Kahane Jos Hill Stephen Reily Ayesha Khanna Rosita Namji Jim Kucher</p>

	<p>Within this line of thought, the entrepreneur, the innovator, the inventor becomes the most critical unit of change. How is that right? How is that not?</p> <p>The entrepreneur sits within a context of broader systems that do not support this kind of innovation, so systems change is focused on creating an ecosystem for innovation.</p> <p>What is the broader environment required for innovation to take hold?</p> <p>What is the role of government regulation, smart subsidies, industry level change?</p> <p>And the billion dollar question. How do we get appropriate investment and capital moving in this direction? What is emerging to be able to strengthen investment strategies for early stage innovation? Where are the efforts misplaced, working with ineffective assumptions or approaches?</p> <p>“Are these new innovative startups creating new solutions that are truly moving the needle on these complex social issues? How do we know this is the case?” Ayesha Khanna</p> <p>“We need more models that use lessons learned from entrepreneurs and their ecosystem to do good. In the world of social impact, everyone is (or should be) an entrepreneur.” Stephen Reily</p>	<p>Talia Arnow Ben Powell</p>
<p>SET B: Pulling Levers Tuesday 12:45-2:00 PM</p>		
<p>The Rules of Capital; Finance and Investing</p> <p>Talcott</p>	<p>When is capital the lever for other systems change? When is the system of finance the object of change itself?</p> <p><i>Three Case Studies:</i></p> <ol style="list-style-type: none"> 1. <i>Trimtab Portfolio</i> 2. <i>Pique Ventures</i> 3. <i>(re)Value Gender</i> <p>Sometimes we are directing finance toward new subjects; sometimes we are changing the practices, the rules, the design of the systems of finance.</p> <p>One lever is how we convince people to move their money. How much of the work to do is about the motivations of the investors?</p> <p>Another lever is the design of instruments, the valuation practices of analysts, and</p>	<p>Joy Anderson Bonnie Foley Wong Josh Arnow Julianne Zimmerman Sally Boulter Rachel Sinha Cheryl Dahle Bruce Campbell</p>

	<p>the packaging of products. What are the limits and opportunities in this driver?</p> <p>How would we go about dismantling modern portfolio theory? What would change if we did?</p> <p>Where are signs of hope within the field of impact investing? Beyond impact investing?</p> <p>“Less conventional portfolios that explicitly aim to be “socially responsible”, “green”, adhere to selected environmental, social and governance standards (ESG) or focus on social impact, are typically built the same way as their conventional brethren. It’s also the case for grant portfolios built by the some of the most progressive visionary foundations and individual donors whose ultimate purpose is to solve the world’s most pressing problems. When all is said and done they typically resemble a fragmented collection of parts instead of a well-integrated engine designed to drive systems level change.” Joshua Arnow</p> <p>“Ultimately, it seems that what’s needed to drive large scale systems change is a large scale change in consciousness and thinking about the value of money. Somehow, we as a global society need to take a more collective view of wealth, sustainability and health. Is that possible?” Bruce Campbell</p> <p>“[We should] continue to do good economic analysis but to then layer on how other factors drive decision-making and resource allocation. I guess I assume that if we could integrate more factors (environmental and social) into our economic decision-making, we would make better and more just decisions.” Steve Godeke</p>	
<p>Intervening across an Industry: Supply Chains, Policy and other Cross-cutting Levers</p> <p>Laurel C</p>	<p>The starting point of this conversation is that to find leverage properly, one needs to look holistically at an industry.</p> <p><i>Three case studies:</i></p> <ol style="list-style-type: none"> 1. <i>Local food systems (Kentucky or others)</i> 2. <i>Seafood industry</i> 3. <i>The real estate industry</i> <p>What are effective strategies for innovating in or influencing the infrastructure of an industry?</p> <p>What are the key levers at play in each industry? How do the levers play off each other?</p> <p>What is common across the case studies?</p> <p>What happens when the industry splits: For example, social change based real</p>	<p>Sara Shroff</p> <p>Peter Battisti Gregory Heller Stephen Reilly Rosita Najmi Jos Hill Jim Davison Caroline Heine Robert Ricigliano</p>

	<p>estate that works in a way fundamentally different from market based real estate.</p> <p>How do we move toward lasting systems change versus responses to government subsidies or other (potentially) temporary incentives?</p> <p>What is the role of consumers in broad based industry change? How do customers shift the practices of a supply chain through their intentions?</p> <p>What is the role of the government as an actor? What needs to be learned here?</p> <p>“How can market-based solutions create or inform policy and regulatory change? The idea is to shift the supply chain towards more responsible behavior until it reaches a tipping point to become what non-adopters decide they must do or they will be left behind.” Peter Battisti</p> <p>“There is a fairly significant unmet demand for local food across all demographics in our community. This information has been quantified and is fairly well known. In “normal” economics, this should indicate an opportunity for businesses to step in and profit on meeting this demand. However, there doesn’t seem to be sufficient infrastructure in place yet for this to happen. Both ends of the value chain need to be developed in parallel, which seems daunting.” Caroline Heine</p>	
<p>Defining Standards: Policy, Transparency and Accountability</p> <p>Laurel B</p>	<p>Standards and measurement is one of the classic systems levers. This conversation will play out the traditional patterns and interventions and beyond.</p> <p><i>Three case studies:</i></p> <ol style="list-style-type: none"> 1. <i>Health care (potentially, Leading Causes of Life)</i> 2. <i>Social impact bonds</i> 3. <i>Accreditation systems and standard setting bodies. E.g. NIST</i> <p>What is the change we are seeking by pulling this lever?</p> <p>How can we address the endemic challenge of moving from counting to valuing in measurement systems?</p> <p>How do different sectors use the power of standards differently? What is there to learn?</p> <p>We often expect the government to ensure standards and accountability but how do we keep the government transparent?</p> <p>What is the role of activism?</p>	<p>Deborah Chay William Fisher Gary Gunderson Kaliya Hamlin Anna Muoio Steve Goedeke Michele Kahane</p>

	<p>What is the relationship between standard setting and shifting mindsets or breaking the frame?</p> <p>“And as any good system thinker knows, the rules are what defines a system’s scope, boundaries and degrees of freedom. And the greatest malfunction of any system tends to be around the rules it engenders. Paying attention to what those rules are and who has sway over them is one of the best levers you can pull. I’d love to learn from people how they’re changing the rules of the systems they’re working in--and doing this in really powerful ways. “ Anna Muoio</p> <p>“Measurement is the fundamental source of leverage for changing the rules of market systems, and for managing them going forward. It plays a key role in markets, providing indicators of both quality and quantity that inform consumer choices, product definitions, and quality improvements. But we have done little as a society to systematically apply established methods of measurement in the management of intangible assets: human, social, and natural capital.” William P. Fisher</p> <p>“Counting is widely assumed to be a basic tool of quantification, but a little bit of thought shows that this is not true. You may have four rocks, and I may have 11, but you may still have a lot more rock than I do if your four rocks weigh a kilogram (2.2 pounds) and my 11 weigh only 500 grams (1.1 pounds). There is in fact no way to determine from the count alone who has more rock. Measurement requires a constant unit, like a gram or an ounce, that mere counting does not possess. Good measuring tools must do more than just help us count correct answers to test questions, or to sum up ratings.” William P. Fisher</p>	
<p>Human Capital: Changing who is at which Tables</p> <p>Laurel A</p>	<p>The tenors of these conversations at Convergence are about crossing sectors, breaking down boundaries. This conversation focuses on thinking about talent that can break down boundaries as the systems change lever.</p> <p><i>Three case studies:</i></p> <ol style="list-style-type: none"> 1. <i>Education reform in Memphis</i> 2. <i>Movement of leaders from nonprofit to for profit sector</i> 3. <i>Developing design thinkers</i> <p>What are the risks and freedoms that come from switching sectors and breaking down the sanctity of disciplines and fields?</p> <p>We can shift talent and change who is at different tables, but what gives them voice? How is that voice amplified? How do we make sure that voices are heard?</p> <p>How does this engage questions of gender, race and class?</p>	<p>Liz Schaffer Octavia Hudson Sarah Brooks Chris Peck Jim Boyd Michael Pergola Melissa Hoffman</p>

	<p>How do you shift sectors and learn the new language to gain credibility, but not be coopted by the new system?</p> <p>When you bring together different groups, cross sector, and need to create time for creating shared language. What are the strategies for creating language that is shared?</p> <p>“Very well intentioned people, often idealistic, enter systems and professions and come out jaded. The institution did its job, molding individual actions to institutional values. The well-intentioned, idealist, was vulnerable to the myth of individualism, believing that it would not happen to her.” Octavia Hudson</p> <p>“If women are under-represented – or even fleeing – the halls of corporate power, how will real and permanent change happen? Is it time to start of movement of talent from the nonprofit to the for-profit sector?” Liz Schaffer</p>	
<p>Business Model and Structure Shifts as an Engine Change</p> <p>Atrium</p>	<p>The limits of structures that we work can define what we see as possible and the frame in which we design and imagine. Therefore, the lever or intervention would be to expand or to innovate the structures and models of organizations.</p> <p><i>Two case studies</i></p> <ol style="list-style-type: none"> 1. <i>The Civic Accelerator or one of its portfolio companies</i> 2. <i>An educational reform effort</i> <p>What is the outcome we hope for in shifting organizational forms? Where do we see important innovations happening around business models?</p> <p>What has been the impact of Benefit Corporation and other legal structure innovations?</p> <p>How do we create new models, behavioral norms, and models for collaboration that span/eliminate traditional organizational boundaries?</p> <p>How much of the shifts in organizational reform are designed around individuals, either investors or the leaders? What is the relationship between individual and organizational change?</p> <p>“I am keenly interested in whether Benefit Corporation and similar business models as engines for social change can be effective on a large scale. In the abstract, they represent a potentially superior approach to human organization than a bifurcated profit/non-profit world, but the proof will be in the real world implementation. I am also very interested in business approaches that seem to be "awakened" to the implications of new scientific ideas.” Andy McCarroll</p>	<p>Jim Kucher</p> <p>Lynnea Brinkerhoff Andy McCarroll Ayesha Khanna Allen Ludgate Talia Arnow Ben Powell Shawn Smith</p>

	<p>“We are thinking hard about how to maximize the likelihood of success for very different business models (our portfolio companies) all designed to crack the unsolvables; how to identify and attract LPs and co-investors who share our aims; how to internalize and leverage heterogeneity to achieve both.” Julianne Zimmerman</p> <p>I am developing the management tools to implement the idea that “proactive mercy is more decent and cheaper than reactive charity.” Gary Gunderson</p>	
<p>SET C: How is change changing? Tuesday 2:15-3:30</p>		
<p>The Trouble with and Potential of the Individual</p> <p>Laurel C</p>	<p>The individual is a problematic character in shifting market systems. Discuss.</p> <p>So many of our assumptions about change rest on an understanding of the role of the individual in the context of complex systems and institutions.</p> <p>We want strong leaders in organizations, entrepreneurial rock stars and strong choosers as consumers. We build whole change strategies that rest on the individual. And we need individuals who believe they can make a difference. “I can change the world by recycling my soda can.” We simultaneously need that belief to exist and we need to recognize it is fundamentally incomplete.</p> <p>And, the terrain is shifting around who leads, how crowds lead, and our understanding of individual choice.</p> <p>Enterprise, charity, philanthropy, investing: how do each of these modes of engaging see the individual?</p> <p>How do systems change strategies of change do a workaround for individual fears and resistance?</p> <p>Most new economy efforts start with early adopters, who are often persons of privilege, and never get past that. How do your strategies shift to get past those individual actors who have the privilege of choice?</p> <p>What have we learned about the role of consumer action in shifting markets and industries?</p> <p>“Individuals talk about changing institutions. More often institutions change individuals.” Octavia Hudson</p> <p>“I think change happens one mind and one heart at a time. It’s a slow game of individual change—in thinking and behavior—that adds up to the big stuff that matters, when you come right down to it.” Anna Muoio</p>	<p>Sara Shroff Octavia Hudson Jim Kucher Kaliya Hamlin Lynnea Brinkerhoff Talia Arnow</p>

	<p>“Has the concept of “individual liberty” been co-opted by the liberal and neoliberal project?” Sarah Shroff</p> <p>“The sharing economy is “cute” but if you don’t have enough to eat. If you don’t have a job that gets you to a stable place to live. What is the point?” Kaliya Dyson</p> <p>“If we partner with the desire for development/evolution, for greater good, then change is much more interesting. This translates into: AS A PERSON, be an open system over the long haul, willing to examine held assumptions, seek out people interested in finding out what’s true, and then tell the truth along the way by talking with interest, with facts, and due diligence, and an embedded desire for a transcendent good. Integrity of the individual is key to bringing about change.” Melissa Hoffman</p>	
<p>Intermediaries Driving Change</p> <p>Talcott</p>	<p>Intermediaries are a force in social and environmental change. And, as we look at shifting market systems, they become even more central. Intermediaries are part of the infrastructure of industries and sectors. Intermediaries help the parts see the system whole. They sense of the system for the parts and facilitate relationships.</p> <p>Intermediaries are complex actors in shifting market systems. Discuss.</p> <p>What are the emerging roles of intermediaries as market shapers? What are the surprising roles they are playing?</p> <p>How has impact investing, in particular, relied on financial intermediaries as social change agents? What are the fault lines, in that case?</p> <p>There is a challenge around who is the customer driving the intermediary. Who do they serve? To whom are they accountable?</p> <p>When do intermediaries support silos and when do they break down silos? When are they an effective bridging structure?</p> <p>What constitutes effective leadership in an intermediary?</p> <p>How are the organizational forms of intermediaries evolving?</p> <p>“So, as an intermediary in the market, we are trying to connect founders and ventures with investors, philanthropists and possible partners and supporters in a more efficient way to build awareness, create investment opportunities, make connections and showcase successes.” Ayesha Khanna</p>	<p>Joy Anderson</p> <p>Gregory Heller</p> <p>Ayesha Khanna</p> <p>Peter Batiste</p> <p>Josh Arnow</p> <p>Steve Goedeke</p> <p>Jim Boyd</p> <p>Rosita Namji</p> <p>Ben Powell</p> <p>Robert Ricigliano</p>

<p>Sector Collisions: Beyond Sector Thinking</p> <p>Laurel B</p>	<p>In the strategy section that follows, we'll have a conversation about cross sector collaboration. Rich topic. This is about sector collisions.</p> <p>In particular, it is the intersection of arenas like public education, social justice, conservation, with sectors of the economy and business. Those are particular collisions.</p> <p>World Wildlife Fund just posted a position for Vice President of Animal Protein. This represents an uneasy intersection of the language of commodities and the language of conservation.</p> <p>In the public education realm, market-based language around competitive, accountable education created huge schisms in reform efforts.</p> <p>In Criterion's gender work, finance is a field with few women, and gender theory has its intellectual roots in Marxism. Bringing together the two groups is, well, challenging.</p> <p>How do we manage the challenges of language, assumptions and lenses?</p> <p>Many of us here straddle two sectors and learn how to translate between the two (or three or four). What are the skills needed to straddle?</p> <p>How do these collisions make the work of shifting market systems more complex? Where do they help?</p> <p>"How might one go about overcoming the reductionist silos that plague and separate the domains of financial and philanthropic investing and build portfolios that are forces for fundamental systems change?" Joshua Arnow</p> <p>"Working with individual case studies and clients at the nexus of global development, I have seen lack of real stakeholder empowerment and consciousness at play. More often than not, social justice is commodified, narrated as an asset through the language of global philanthropy, development and corporate social responsibility where health interventions, education initiatives, and economic upliftment are being sold." Sara Shroff</p> <p>"I fear that much of the issue-specific work we are engaged in is tilting at windmills." Allan Ludgate</p>	<p>Deborah Chay</p> <p>Chris Peck Allen Ludgate Sally Boulter Cheryl Dahle Bruce Campbell Michele Kahane</p>
<p>Investing in Systems that Create Life</p>	<p>Gary Gunderson and collaborators have developed a framework around "leading causes of life." They name five: Coherence, Connection, Agency, Intergenerativity, Hope. This is a framework build within public health.</p>	<p>Rachel Sinha</p> <p>Andy McCarroll Anna Stephen Reily</p>

<p>Atrium</p>	<p>Andy, Rachel, Gary and Joy were together in South Africa in January talking about what these causes can add to a conversation about finance and institutions. Welcome to that conversation. Now add your piece.</p> <p>How do we see understand, interpret systems that create life?</p> <p>What would it mean to literally invest capital in systems that create life? How would that change how value is assigned?</p> <p>“What are the technical specifications of the networks and the messages we will send through them to measure and manage the things that make life worthwhile? How do we set up the market systems through which innovations in more creatively managing and increasing the things that make life worthwhile can be recognized, disseminated, and rewarded? When those questions are grasped, then further questions arise as to the social, cultural, and economic barriers and opportunities that might block or promote the creation of these networks and messages.” William P. Fisher</p> <p>“I want to be a facilitator of life's most beautiful, thoughtful, creative emergence. So much of this can happen through the economy and markets, but never will fully with current structures and definitions.” Andy McCarroll</p> <p>“We are encouraging a farm to table awareness, understanding, engagement and advocacy regarding that which does not contribute back to life but rather only takes from it with no regard for replenishing its resources with future generations in mind and heart. We become partners in wise choices for humanity at large, embedded in systems that replenish themselves and regard ourselves as a responsible and influential member of the web of life.” Lynnea Brinkerhoff</p>	<p>Sarah Brooks Gary Gunderson Michael Pergola Melissa Hoffman</p>
<p>Messing with Expertise</p> <p>Laurel A</p>	<p>Knowledge is power. And in market systems, particularly finance, the projection of expert knowledge stabilizes systems. We trust so much of our economic lives to a set of experts who claim particular knowledge. Expertise is a powerful system.</p> <p>Changing systems requires messing with what knowledge is seen as expert. Discuss.</p> <p>What new expert fields have emerged in an attempt to shift the rules of the economy?</p> <p>What is the role of systems of education and accreditation?</p> <p>If we are blending sectors, are we creating blended experts? What would it take for multi-contextual knowledge to matter?</p>	<p>Jos Hill William Fisher Bonnie Foley Jim Davidson Liz Schaffer Julianne Zimmerman Shawn Smith Carolien Heine</p>

	<p>Whose expertise matters? What other factors are at play of race, class, gender, geography, etc?</p> <p>“So many misconceptions in the prevailing wisdom. I’m interested in figuring out how to replace those with more functional, more insightful, and more humane memes.” Julianne Zimmerman</p> <p>“The process of investing can be an in-depth intellectual exercise, potentially an intimate engagement of investors and the problems they intend to affect. I don’t believe the current system is effectively addressing the core emotional and intellectual needs of the social-venture investor, instead relying too heavily on traditional investing systems and expectations.” Jim Davidson</p> <p>“How do we make efficient markets for intangible assets? How do we tune the instruments of the human and social sciences so as to better harmonize and orchestrate relationships, and arrange and play the songs of life in the forms of every conceivable genre, from the blues to jazz to the classics and rock?” William P. Fisher</p>	
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<p>SET D: Strategy Design and Development Wednesday 9:45-11:00 AM</p>		
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<p>When Many Agree: Developing Collective Action/ Intelligence/ Impact Strategies</p> <p>Talcott</p>	<p>People coming together for collective action. United for a common good, working in coordination. It’s the systems change dream.</p> <p>What are the strategies of collective impact, intelligence, action?</p> <p>Collective action aggregates power and enables organization to work toward a common goal. Who defines the common narrative?</p> <p>How can you reach efficiency of scaling across multiple contexts, without losing the contextual, grounded richness?</p> <p>Where is the deliberative power of the people in shifting market systems?</p> <p>What is the difference between strategies at an organizational level and at an organizing level?</p> <p>How much of the collective is top down or grass tops?</p> <p>What is the role of movements?</p> <p>How do we navigate the illusion of kumbaya? Sometimes we hear the collective even when it is not there.</p>	<p>Joy Anderson</p> <p>Anna Muoio</p> <p>Liz Shaffer</p> <p>Jim Boyd</p> <p>Caroline Heine</p> <p>Kaliya Hamlin</p> <p>William Fisher</p> <p>Robert Ricigliano</p> <p>Jim Kucher</p>
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	<p>“When trying to craft a shared narrative of the change that a group can make in the world, the challenge of releasing the tight grip each holds on his or her tribal story in order to ladder up to a common agenda can be a tricky moment.” Anna Muoio</p> <p>“Consensus building is a huge challenge in this work, as is overcoming the fear of change and the human tendency to avoid risk.” Jim Kucher</p> <p>“A focus on the organization as the unit of change needs to shift—and the game is not about scaling orgs but about scaling impact. If you ask how you can best scale impact, the range of viable theories opens up.” Anna Muoio</p> <p>“We are not in the business of trying to change peoples’ minds.” Rachel Sinha</p>	
<p>Constructing Cross Sector Strategies</p> <p>Laurel B</p>	<p><i>Metaphor 1: Figuring out how to get elephants to dance with tigers and ants in an orchestrated way.</i></p> <p><i>Metaphor 2: Sitting at the middle of a three legged stool.</i></p> <p>Where do we see examples of cross sector collaboration really working? Who is leading those?</p> <p>Walk through a couple examples: Who is at the table representing what interests? What is the strategy? What is the impact sought? Who set that table? What do the actors expect from the collaboration?</p> <p>What levers are these strategies most often directed at? Flow of capital? Standards? Is there a pattern?</p> <p>Talk about cross sector collaboration is common. Why is this so rare?</p> <p>What can make cross sector collaboration more efficient? Should we try?</p> <p>Which sectors are best equipped to play what role? What can each sector bring to the table in these conversations?</p> <p>What are the elements of a cross sector collaboration that works? (Begg the question of what “works” means)</p> <p>“Employing janitors and housekeepers to work as part time community health workers as a way of controlling and redirecting charity care toward better use. Oh, and saving their jobs in the process.” Gary Gunderson</p> <p>“Government lacks the dollars to pay for and mange new programs itself, but</p>	<p>Deborah Chay</p> <p>Stephen Reilly</p> <p>Ayesha Khanna</p> <p>Gregory Heller</p> <p>Stephen Goedeke</p> <p>Sally Boulter</p> <p>Allan Ludgate</p> <p>Gary Gunderson</p>

	<p>people in government keep talking like it does, and people outside government keep turning to it like it does. Non-profits can make things happen, but rarely by themselves. And for-profit companies, while essential are easily distracted from a more civic-minded mission. I continue to think that energy focused at combining the best of these three realms – working in the middle of a three-legged stool – is the most innovative place to effect change, but also one of the rarest.” Stephen Reily</p>	
<p>Broadcasts: Amplifying Messages for Systems Change</p> <p>Atrium</p>	<p>The systems of markets and industries have maintained a shroud, a cloak of opacity. To course correct, we need to broadcast, amplify messages that unveil the system and create imagination for a different future.</p> <p>How do we tell complex stories? The stories that get told are the stories of the mythic hero, of the individual overcoming challenges to transform the world. How do we tell the other stories in a way they will get heard?</p> <p>How do we curate systems change efforts? What are the strategies that work?</p> <p>What are the megaphones of systems change?</p> <p>What are the moments of “magic messages”? When, like the phrase abracadabra, does the message, or the reframe, shifts someone’s understanding and effects change?</p>	<p>Sara Shroff Cheryl Dahle Chris Peck Octavia Hudson Bruce Campbell Shawn Smith</p>
<p>Methods of Surfacing Innovation</p> <p>Laurel A</p>	<p>This conversations digs into methods for surfacing innovation.</p> <p>Are we supporting, surfacing, generating, diffusing innovation? What is the difference in the current methods?</p> <p>Thinking through the networks that vet innovation: Are they surfacing innovation? Are they creating the right pipeline?</p> <p>Do we have the best carrots to motivate innovators? (prizes, connections, etc)</p> <p>Do we have the best institutional structures to invite innovators? (universities, accelerators)</p> <p>What if the work of finding innovation was more based in conversation?</p> <p>How do we aggregate and map the most promising breakthrough solutions? Are the current models doing that effectively? What does it take to do this well?</p> <p>In these networks, who defines what innovation is? Who defines what innovation matters?</p>	<p>Rachel Sinha Lynnea Brinkerhoff Jim Davidson Peter Battisti Bonnie Foley Wong Andy McCarroll Michele Kahane Ben Powell Melissa Hoffman</p>

	<p>“Change happens through empowering and connecting individuals and believing in human ingenuity.” Talia Arnow</p> <p>“We talk about good and positive impact. People on the ground are creating new and innovative business, however, the bounds of the power still rests with people with resources and power.” Bonnie Foley-Wong</p> <p>“Nothing seems to originate in the expected places, and yet people keep acting like it will.” Stephen Reily</p>	
<p>Strategies for Disrupting the System</p> <p>Laurel C</p>	<p><i>Disruption: disturbance or problems that interrupt an event, activity, or process.</i></p> <p>How can the investor, the fund, the entrepreneur disrupt what is normally written off as intractable?</p> <p>Disruption is often from outside the system, upending the current system. But sometimes it is a distraction, just a “shiny bauble.” And, the system simply rights itself and shrugs off the interruption.</p> <p>How do disruptive strategies deal with or fail to deal with questions of power and difference?</p> <p>What are the disruptive strategies that have worked to shift market systems?</p> <p>When do they accelerate change? How do they accelerate change?</p> <p>What principals need to guide design of disruption?</p> <p>How do you design disruption? Who needs to be in the process of design?</p> <p>What are the tactical challenges of disruption?</p> <p>“Practical ways to free ourselves from growing dependence on financial instruments that are far removed from our everyday lives” Michael Pergola</p> <p>“Positively disruptive phenomena are accelerating and have begun to change the rules. To name a few: open sourcing, crowd funding, crowd sourcing of knowledge and customer preferences, the DIY- hacker/maker/repairer/mapper movements, the organizing and data gathering capability of social media networking and mobile devices, collaborative citizen science, decentralized manufacturing via CNC reduction and 3D printing, collaborative asset sharing via vehicle, couch surfing and apartment sharing, digital currencies, impact bonds, social impact stock exchanges.</p>	<p>Jos Hill</p> <p>Josh Arnow Talia Arnow Julianne Zimmerman Rosita Najmi Sarah Brooks Michael Pergola</p>

	<p>How can all the phenomena listed above, plus whatever else I left out, be intentionally harnessed, integrated, and amplified in order to build the new models that have the potential to catalyze 2nd order change in the systems causing the most destruction to people and the planet.” Joshua Arnow</p> <p>“I believe there will always be a way to create new, more responsible market channels which can tackle a small percentage of the market, I worry about the larger market and how to create solutions that are viable to more than the 5% to10% of people who are willing to pay more to create change.” Peter Battisti</p>	
<p>SET E: Navigating Power Wednesday 11:15-12:30</p>		
<p>Transgressive Entrepreneurs</p> <p>Laurel C</p>	<p>Transgressive: involving a violation of accepted or imposed boundaries, esp. those of social acceptability</p> <p>Many of what we might call social entrepreneurs are pushing the boundaries of the market systems as they stand. We think of them as using market forces but they are innovators who are ahead of markets or outside of the standards or challenging value chains.</p> <p>Art is an interesting case study as it is seeking to shape discourse and yet it is a commodity that is sold in the marketplace.</p> <p>How do you use a market system to sell something that people aren't ready to buy? When do you need to shift from a product or enterprise focus to a systems level focus?</p> <p>Where do entrepreneurs borrow/gather/gain power to be able to stay in the game long enough for the market to catch up?</p> <p>What are the characteristics of entrepreneurs who have the ability to effectively be and stay transgressive? How do they understand their own power?</p> <p>In the end, entrepreneurs need to run a business. And they need to make their business grow. How do entrepreneurs drive operational mechanics in the context of uncertainty or market resistance? What keeps the entrepreneur on track?</p> <p>Where can transgressive entrepreneurs draw on ecosystems for support? How are these ecosystems different than the ones we are building now?</p> <p>“I am also working to use market systems to change the way artists think about themselves and their careers, and how they find a platform for their message.</p>	<p>Cheryl Dahle Ayesha Khanna Jim Kucher Julianne Zimmerman Stephen Reily Lynnea Brinkerhoff Caroline Heine Peter Battisti Rachel Sinha</p>

	<p>This include artists whose work reaches the enterprise level but also changes the way artists think of themselves, less as suffering geniuses than as transgressive entrepreneurs. It also helps art institutions see themselves as players in a broader marketplace rather than temples.” Stephen Reily</p> <p>“Entrepreneurs are busy with first starting and running their own company and often the greater systems change may be compromised because of this, have others had challenges along these lines where there have been commitments made but the inability to see their commitments through due to the pressures of being a business owner? How do you keep those parties motivated and committed?” Peter Battisti</p>	
<p>Subtle Maneuvers: The Stealth Approach</p> <p>Atrium</p>	<p><i>Subtle: (esp. of a change or distinction) so delicate or precise as to be difficult to analyze or describe.</i></p> <p>What if your challenge to the market system requires more power than you have at your disposal? Or for other calculated reasons, you can’t go full frontal.</p> <p>How do we describe the art of subtlety in big change?</p> <p>Can we be both subtle and disruptive?</p> <p>When do we seek to not yet satisfy cravings for clarity? When do we delay satisfaction on the simple answer? (The answer that in the light of day will simply be shot down by the forces that be.)</p> <p>Subtle strategies are often multiple, divergent threads. What does it take to manage these?</p> <p>How are subtle strategies effective at managing vested interests?</p> <p>What are the types of actors, in market systems that require the most subtlety?</p> <p>What is your favorite stealth strategy?</p> <p><i>This group is so subtle about their strategies they didn’t name it in their questionnaires.</i></p>	<p>Jos Hill</p> <p>Bonnie Wong Octavia Hudson Jim Davidson Sally Boulter Kaliya Hamlin Andy McCarroll Melissa Hoffman Sara Shroff</p>
<p>Unmasking Conflict and Recognizing Difference</p> <p>Talcott</p>	<p>In market-based work, we often believe we can simply innovate our way to a new future. The rational logic of the market will prevail as incentives and interests line up for the greater good.</p> <p>But this story masks conflict and difference.</p>	<p>Joy Anderson</p> <p>Rosita Namji Jim Boyd Josh Arnow Talia Arnow William Fisher</p>

	<p>How can we more effectively recognize when our strategies mask conflict?</p> <p>How can our strategies and tactics address assumptions about how people see their power in a market system?</p> <p>We have a tendency to only work with the people who “get it.” Or we wish everyone just agreed with us. When does that perpetuate tensions around difference, particularly around gender, race and class?</p> <p>How do we change who is at the table for reinventing the economy?</p> <p>“Today, the processes of corporatization, globalization and development gives ultimate power to economic value, assuming that purchasing power is what constitutes real success and its tradability in this international world is what one should aspire for. This didactic runs so deep, that communities on the receiving end are silenced, voiceless.” Sara Shroff</p>	<p>Gregory Heller Allan Ludgate Michele Kahane Shawn Smith Michael Pergola</p>
<p>Positional Power</p> <p>Laurel B</p>	<p>To be able to shift the system you need to have power. And where you chose to position yourself implicates you in the very systems you are seeking to shift.</p> <p>How do we managing complex, contextual power? Where you sit determines how you are seen, what power you have, your freedom to act and so much more.</p> <p>The classic choice of social change: Do you work within or withdraw from the system? In some market systems this is particularly challenging. How can you engage if you are not in the transactions?</p> <p>The role of consulting firms acting as change agents has grown. They are the outsider and sit at a systems lever where you can create and see a whole and name an efficient path. But you are an outsider, a temporary worker. What are the effective and ethical ways to manage this kind of positional power?</p> <p>Funders have power through capital but they have limits in what they can shape since they aren’t actually in the system. But they are as investors. How has that shaped funders roles in shifting market systems?</p> <p>For those who play the role of “boundary leader,” what are the tools that build trust when you are working in complex systems?</p>	<p>Deborah Chay Sarah Brooks Chris Peck Anna Muoio Liz Schaffer Bruce Campbell Steve Goedeke Robert Ricigliano Gary Gunderson Ben Powell</p>

SET F: Enabling Systems-Level Change Leadership Wednesday 1:30-2:45 PM		
<p>Teaching and Talking about Systems in Organizations</p> <p>Laurel C</p>	<p>How do we equip people to lead in systems change?</p> <p>Leaders in organizations are going to drive the change. What are the effective strategies to building organizational capability to think about systems?</p> <p>The language of systems is distancing in many ways. How can we expand who is in the conversation around systems change?</p> <p>What are the particular challenges to talking about market systems?</p> <p>How do we integrate conversations about systems into the impact investing/social entrepreneurship sector that is often focused at the level of the enterprise?</p> <p>Is there a role for gaming?</p> <p>What is the role of universities?</p>	<p>Sara Shroff Lynnea Brinkerhoff Steve Goedeke Jos Hill Talia Arnow Gary Gunderson Robert Ricigliano William Fisher Sarah Brooks Allan Ludgate Andy McCarroll</p>
<p>Holding Together Collaborations</p> <p>Laurel B</p>	<p>We all play some role in holding together alliances and collaborations. And we continue to be accountable for holding them together as they stumble and fall.</p> <p>What are the practices of good governance in collaborations?</p> <p>What is uniquely challenging in collaboration between naturally competitive organizations?</p> <p>What are the ways that technology helps? When is technology a core part of the solution and when do we need to keep it light and simple?</p> <p>What other technologies, like design thinking, help?</p>	<p>Michele Kahane Rachel Sinha Sally Boulter Josh Arnow Anna Munio Caroline Heine Gregory Heller Jim Kucher Chris Peck</p>
<p>The Price and Costs of Systems Change</p> <p>Talcott</p>	<p>Systems change work is risky and complex and impact is difficult to attribute (see all conversations above). Those characteristics make it difficult to resource.</p> <p>How do you solve for, in resource constrained organization, what people are willing to pay for systems change (price) and what it really takes to do this (costs)?</p> <p>Who pays for systems change, and how? How do they tend to understand what they are paying for?</p>	<p>Joy Anderson Elizabeth Shaffer Jim Boyd Bruce Campbell Stephen Reily Cheryl Dahle Ben Powell Shawn Smith Deborah Chay</p>

	<p>Where do you find efficiency in contextualized change? Partnerships and alliances. Staffing. Tools.</p> <p>How do we create a marketplace around change of market systems?</p> <p>What are the distortions of prices and costs?</p> <p>What is particular to the costs of building networks? How do you think through who pays for those networks?</p> <p>When do we keep things simple? Does that affect price and costs?</p>	<p>Jim Davidson Rosita Namji</p>
<p>Building Communities of Co-Conspirators</p> <p>Atrium</p>	<p>Systems change leaders spend time building networks to support leadership as their change strategy, but where are the networks that support their leadership.</p> <p>What kind of structural support is needed for systems leadership?</p> <p>How do you find comrades or co-conspirators who can travel with you? How do we make that possible for more people?</p> <p>What are the challenges of networks for networkers? It's like care for caregivers.</p> <p>In the end, though, this conversation can be contextual to this moment and this group can be co-conspirators for 75 min. It's a start.</p>	<p>Sarah Munford Octavia Hudson Peter Battisti Ayesha Khanna Bonnie Wong Kaliya Hamlin Michael Pergola Melissa Hoffman Julianne Zimmerman</p>